

# User Manual

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# Administration - Categories

A category must be created before any questions can be added by users.

- A question has to be linked to a category and more than one question can be linked to a category.
- The Categories option will be available to the Administrator on the Quick Links option on the right-hand side of the Ask the Expert screen.

## Create a Category

### Where do I find the Categories option?

To add a category, select the Categories menu item and after the page has loaded, click on the Create Category button.

The screenshot shows the LMS Portal interface. At the top, there is a dark blue header with 'LMS Portal' and navigation icons. Below the header is a search bar. The main content area is divided into sections. On the left, there are navigation tabs for 'e-Learning Programmes', 'Discussion Forum', and 'My Achievements'. Below these, there is a breadcrumb trail 'Discussion Forum > Categories'. A button labeled '+ Create a Category' is highlighted with a red box. Below this button is a table with two columns: 'Actions' and 'Category Heading'. The table contains two rows: one for 'Pathways' and one for 'Performance Management'. On the right side, there is a 'Quick Links' sidebar with a list of options: 'Ask The Expert', 'My Questions', 'Moderation', 'Questions', 'Comments', 'Categories', and 'Experts'. The 'Categories' option is highlighted with a red box. At the bottom of the page, there is a footer with the text 'Schema: [1] Signify Academy | Subgroup: All Employees' and 'V8.8.0.3 Copyright © 2019 Signify. All Rights Reserved.'

- Select the **Categories** menu item from the **Quick Links**.
- Click the **Create a Category** button.

The Create a Category page opens.

**LMS Portal** ? ✉ 👤

Search

e-Learning Programmes **1** ? Discussion Forum 🎓 My Achievements **18** **Quick Links**

Discussion Forum » Discussion Forum Question » Create

### Create a Category

Category Heading \*

**Save** Back

Schema: [1] Signify Academy | Subgroup: All Employees V8.8.0.3 Copyright © 2019 Signify. All Rights Reserved.

- Click the **Save** button. The new category will be listed on the categories page and can be edited or removed.



**LMS Portal** ? ✉ 👤

Search

e-Learning Programmes **1** ? Discussion Forum 🎓 My Achievements **18** **Quick Links**

Discussion Forum » Categories

**+ Create a Category**

Actions	Category Heading
<div style="border: 1px solid #ccc; padding: 2px;">           Actions ▾           <ul style="list-style-type: none"> <li> Edit</li> <li> Remove</li> </ul> </div>	Pathways
	Finance Management

Schema: [1] Signify Academy | Subgroup: All Employees V8.8.0.3 Copyright © 2019 Signify. All Rights Reserved.

## Actions

Click Actions:

- **Edit** to edit the Category.
- **Remove** to remove the Category.

**Try It Out:** Add a Category on the Discussion Forum module

# Administration - Experts

## What is an Expert?

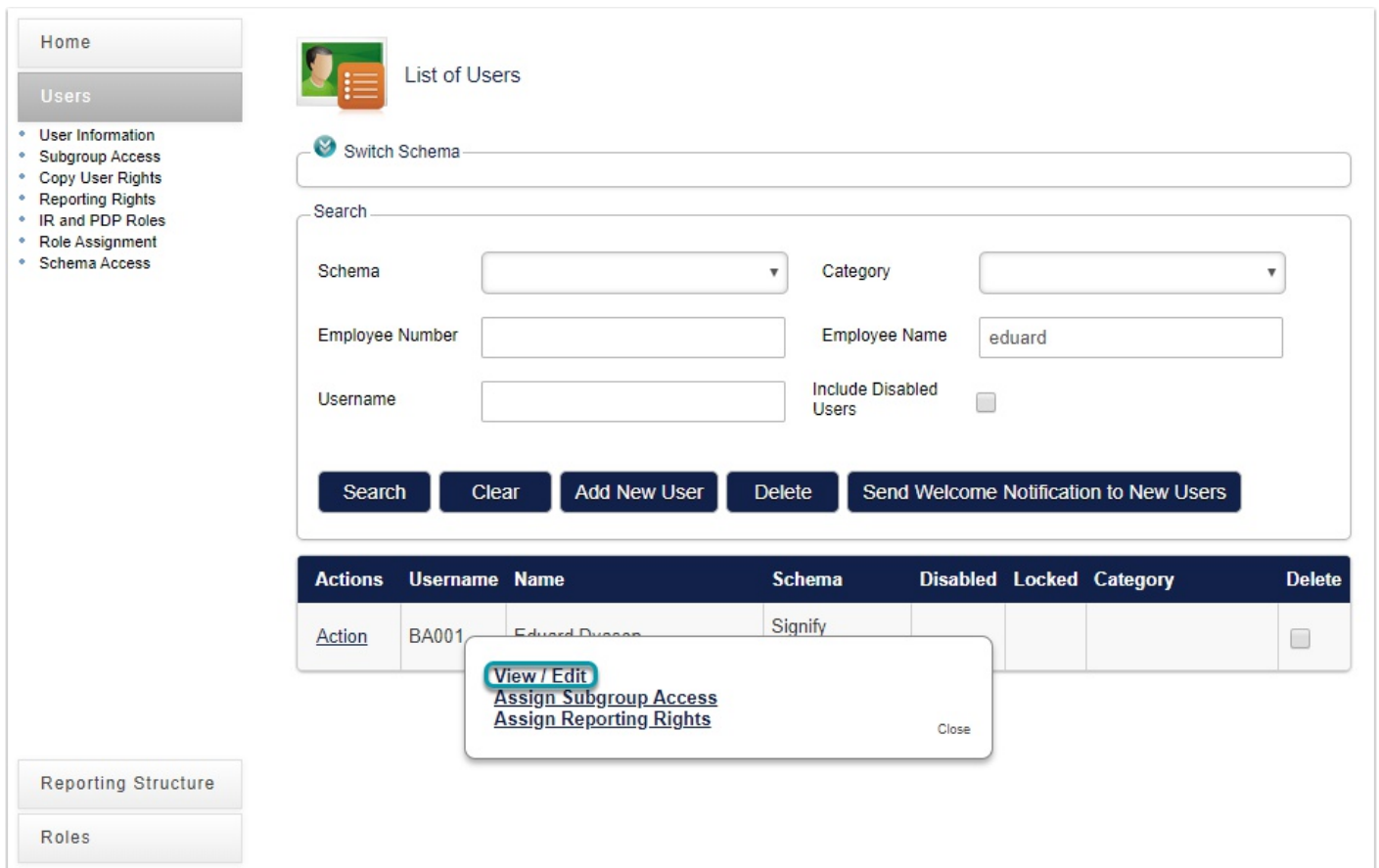
A Expert is an individual assigned to mentor and give expert advice on questions asked by learners or employees.

The administrator can assign an Expert to a category(s) to moderate. Experts can view, edit, remove and moderate questions and comments in the category(s) they have been assigned to.

## 1. Assign a User to an Expert Role

### Find the user

- Click on **System administration | Users | Manage users.**
- Click **Action | View / Edit** next to the user you want to grant access.



The screenshot shows the 'List of Users' interface. On the left is a navigation menu with 'Home' and 'Users' (selected). Under 'Users', there are links for 'User Information', 'Subgroup Access', 'Copy User Rights', 'Reporting Rights', 'IR and PDP Roles', 'Role Assignment', and 'Schema Access'. At the bottom left are 'Reporting Structure' and 'Roles' buttons.

The main content area is titled 'List of Users' and includes a 'Switch Schema' button. Below is a search section with fields for 'Schema', 'Category', 'Employee Number', 'Employee Name' (containing 'eduard'), and 'Username'. There is also an 'Include Disabled Users' checkbox. Action buttons include 'Search', 'Clear', 'Add New User', 'Delete', and 'Send Welcome Notification to New Users'.

A table below the search section has the following columns: 'Actions', 'Username', 'Name', 'Schema', 'Disabled', 'Locked', 'Category', and 'Delete'. The table contains one row for user 'BA001' with name 'Eduard Dussan' and schema 'Signify'. A context menu is open over the 'Actions' column, showing options: 'View / Edit', 'Assign Subgroup Access', and 'Assign Reporting Rights'. A 'Close' button is at the bottom right of the menu.

Actions	Username	Name	Schema	Disabled	Locked	Category	Delete
Action	BA001	Eduard Dussan	Signify				<input type="checkbox"/>

# Assign the Role

Home

Users

- User Information
- Subgroup Access
- Copy User Rights
- Reporting Rights
- IR and PDP Roles
- Role Assignment**
- Schema Access

User Role List (BA001) [Successfully Saved - 10:32:11 AM]

Search  Search Clear

Add Delete **Add Multiple Roles**

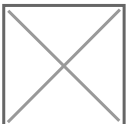
Module	Role	Delete
Event Management	Event Administrator	<input type="checkbox"/>
Job Profiler	Job Profiler Administrator	<input type="checkbox"/>
Learning	Learning Administrator	<input type="checkbox"/>
Organization	Organisation Structure Administrator	<input type="checkbox"/>
System Access	Schema Administrator	<input type="checkbox"/>
Global	System Administration Administrator	<input type="checkbox"/>

Reporting Structure

Roles

Add Delete **Add Multiple Roles**

- Select *Role Assignment*.
- Click the *Add Multiple Roles* button.

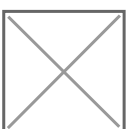


The Add Multiple Roles screen will open.

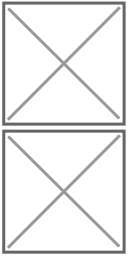
- Select the Ask The Expert Expert Role for the Ask The Expert module.
- Click the **Save** button.
- Click the **Close** button.

## Assign specific rights for the user

Click on the Role to open the specific access available for this role.



Select the Role detail applicable to the user.



- Click *Save* to *apply* the change.
- Click *Back to List* to Return to the User Role List.

## Rights available for a user with the Ask The Expert Role

Role	User	Moderator	Administrator
Add a new question	X	X	X
View the questions you asked	X	X	X
View question statistics	X	X	X
Search for specific questions / comments	X	X	X
View Current Discussions	X	X	X
View Most Read	X	X	X
View Most Commented	X	X	X
Report Questions asked by fellow users	X	X	X
Report Comments made by fellow users	X	X	X
Moderate questions and comments: Publish		X	X
Moderate questions and comments: Unpublish		X	X
Moderate questions and comments: Lock		X	X
Moderate questions and comments: Remove		X	X
Moderate questions and comments: Edit		X	X

Role	User	Moderator	Administrator
Remove / Edit questions individually		X	X
Remove / Edit comments individually		X	X
Add / Edit and Remove Categories		X	X
Add / Edit and Remove Experts			X
Mark comments as preferred			X
Assign Experts to categories			X

## What happens now?

The user's name will appear in the Expert drop down on the Assign an Expert page once the user has been assigned the Expert Role.

**LMS Portal** [?] [Envelope] [Profile]

Search [v]

e-Learning Programmes <sup>1</sup> Discussion Forum [?] My Achievements <sup>18</sup>

Discussion Forum > Discussion Forum Question > Assign

### ASSIGN CATEGORIES TO EXPERT

Category Experts \*

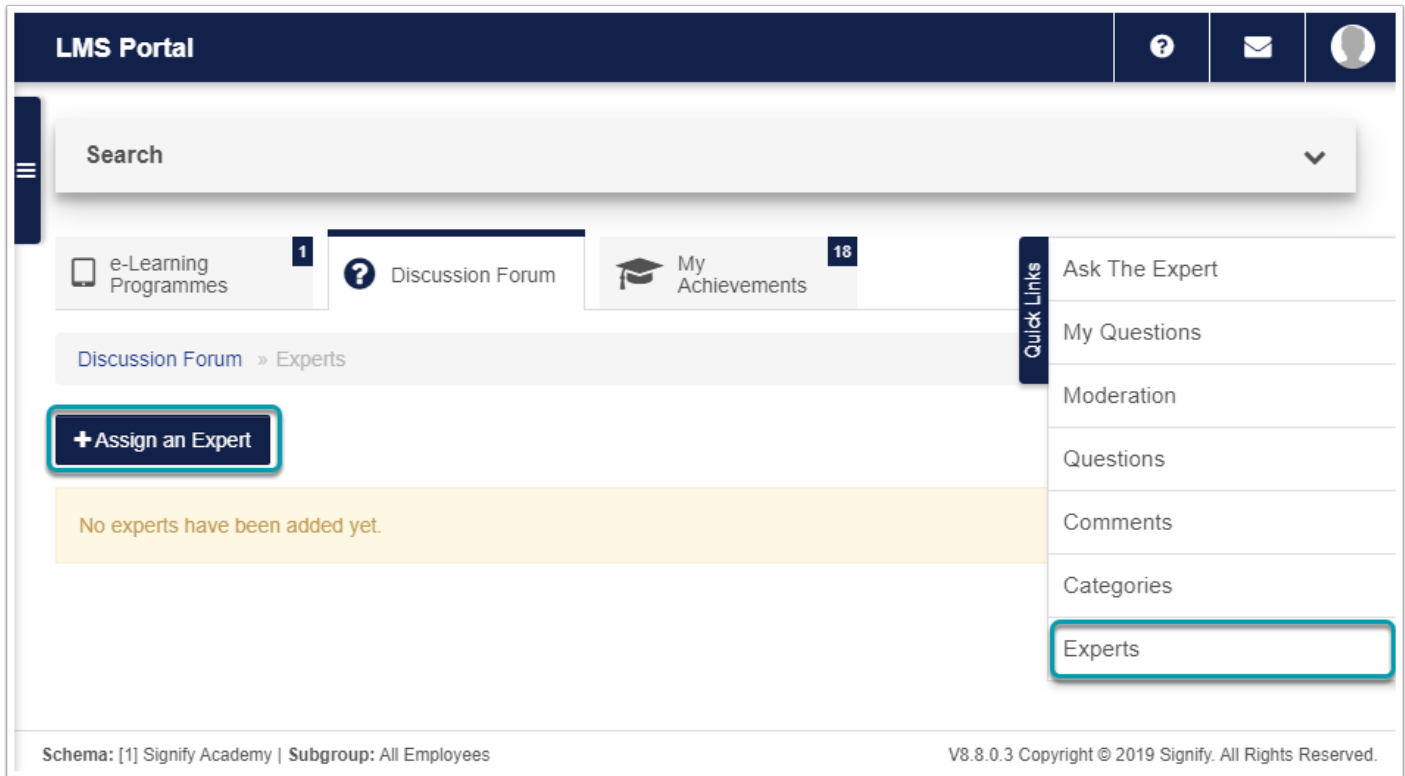
Category \*   
Performance Management

Quick Links

## 2. Assign an Expert

### Where do I find the Experts option?

The Experts option will be available to the Administrator on the Quick Links option on the right-hand side of the Ask the Expert screen.



The screenshot displays the LMS Portal interface. At the top, there is a dark blue header with the text "LMS Portal" and three icons: a question mark, an envelope, and a profile picture. Below the header is a search bar with the text "Search" and a dropdown arrow. Underneath the search bar are three main navigation tiles: "e-Learning Programmes" with a notification badge "1", "Discussion Forum" with a question mark icon, and "My Achievements" with a notification badge "18". Below these tiles is a breadcrumb trail: "Discussion Forum > Experts". A blue button with a plus sign and the text "+ Assign an Expert" is highlighted with a red box. Below this button is a yellow message box that says "No experts have been added yet." On the right side of the interface, there is a "Quick Links" menu with the following items: "Ask The Expert", "My Questions", "Moderation", "Questions", "Comments", "Categories", and "Experts". The "Experts" item is highlighted with a red box. At the bottom of the page, there is a footer with the text "Schema: [1] Signify Academy | Subgroup: All Employees" on the left and "V8.8.0.3 Copyright © 2019 Signify. All Rights Reserved." on the right.

- Select the **Experts** menu item from the **Quick Links**.
- Click the **Assign an Expert** button to open the Experts page.

The screenshot shows the LMS Portal interface. At the top, there is a dark blue header with 'LMS Portal' on the left and navigation icons (help, mail, profile) on the right. Below the header is a search bar. A navigation menu contains 'e-Learning Programmes' (1), 'Discussion Forum' (with a question mark icon), and 'My Achievements' (18). A breadcrumb trail reads 'Discussion Forum > Discussion Forum Question > Assign'. The main section is titled 'ASSIGN CATEGORIES TO EXPERT'. It features a 'Category Experts \*' dropdown menu with 'Eduard Dyason' selected. Below it, a 'Category \*' dropdown menu is open, showing 'Pathways' and 'Performance Management' as options. At the bottom, there are 'Assign' and 'Back' buttons.

- Select the **Expert** from the drop down.
- Select one or multiple categories for the Expert to moderate.
- Multiple categories can be selected if you hold the *Ctrl* button in and select the categories.
  - Click the *Assign* button.
  - The Expert will be listed on the Experts page and can be edited or removed.

## Expert List

**LMS Portal** ? ✉ 👤

Search ▼

📄 e-Learning Programmes **1**
🔍 Discussion Forum
🎓 My Achievements **18**

Discussion Forum » Experts

**+ Assign an Expert**

Actions	Employee	Category
Actions ▼ Edit Remove	Eduard Dyason (BA001)	Pathways
	yason (BA001)	Performance Management

Quick Links

Click Actions:

- **Edit** next to the Expert you want to edit.
- **Remove** next to the Expert you want to remove.

Try It Out: Assign Ask The Expert, Expert Rights to a user and add the user as an Expert on a Category.

# Administration - My Questions

Questions and discussions are at the heart of the Discussion Forum / Ask The Experts module.

Questions are linked to a Category so that an Expert can provide an answer to the question.

The My Questions section, displays questions created by the logged in user, in this case the Ask The Expert Administrator.

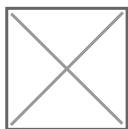


[Zoom:](#)

## Ask a Question

- Click the Ask a Question button to add a new question.

The Add New Question screen will open.



[Zoom:](#)

## Overview of Fields

Field	Overview
Category	Select a Category from the drop down list.
Question Status	Statuses available: <ul style="list-style-type: none"><li>• Hidden From User</li><li>• Locked</li><li>• Not Published</li><li>• Published - The question will be displayed to the learners/users.</li><li>• To Be Moderated</li></ul>
Question Heading	Use a short descriptive phrase which gives learners an idea of what is being asked.
Question	The question being asked.

Field	Overview
Click here to upload or drag your files to this window	A file (document, image, etc.) can be uploaded to support the question.

# Question List



[Zoom:](#)

# Actions

Click Actions:

- Edit to edit the Question.
- Remove to remove the Question.
- Generate Link to generate a link to the discussion related to the Question.

# Generate Link

To ensure the learners who need to see the Question and answers to the Question, the link can be added to a pathway.

- Click Copy to clipboard to copy the Question Link.



[Zoom:](#)

**Try It Out:** Add a question & generate the link and add it to a Pathway.