

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 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 user profile. Below the header is a search bar. The main content area features a navigation bar with three tabs: 'e-Learning Programmes' (with a '1' badge), 'Discussion Forum' (with a question mark icon), and 'My Achievements' (with a '18' badge). Below the navigation bar, there is a breadcrumb trail: 'Discussion Forum » Categories'. A blue 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 has two rows: 'Pathways' and 'Performance Management'. 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' (highlighted with a red box), and 'Experts'. 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 **Categories** menu item from the **Quick Links**.
- Click the **Create a Category** button.

The Create a Category page opens.

The screenshot shows the 'Create a Category' page in the LMS Portal. The header is dark blue with 'LMS Portal' on the left and navigation icons (help, mail, user) on the right. Below the header is a search bar. A navigation bar contains three items: 'e-Learning Programmes' with a count of 1, 'Discussion Forum' with a question mark icon, and 'My Achievements' with a count of 18. A breadcrumb trail reads 'Discussion Forum » Discussion Forum Question » Create'. The main heading is 'Create a Category'. Below it, the label 'Category Heading *' is next to a text input field containing 'Pathways'. At the bottom are 'Save' and 'Back' buttons. The footer shows 'Schema: [1] Signify Academy | Subgroup: All Employees' and 'V8.8.0.3 Copyright © 2019 Signify. All Rights Reserved.'.

LMS Portal

Search

e-Learning Programmes 1 Discussion Forum My Achievements 18

Discussion Forum » Discussion Forum Question » Create

Create a Category

Category Heading * Pathways

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.

The screenshot shows the 'Categories' page in the LMS Portal. The header and navigation bar are identical to the previous page. The breadcrumb trail is 'Discussion Forum » Categories'. A button labeled '+ Create a Category' is visible. Below it is a table with two columns: 'Actions' and 'Category Heading'. The first row shows 'Pathways' in the 'Category Heading' column. The 'Actions' column contains a dropdown menu with 'Edit' and 'Remove' options. The footer is the same as the previous page.

LMS Portal

Search

e-Learning Programmes 1 Discussion Forum My Achievements 18

Discussion Forum » Categories

+ Create a Category

Actions	Category Heading
Actions ▾	Pathways
Edit	Pathways
Remove	Pathways

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.

Home

Users

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



List of Users

Switch Schema

Search

Schema

Employee Number

Username

Category

Employee Name

eduard

Include Disabled Users

☐

Search

Clear

Add New User

Delete

Send Welcome Notification to New Users

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

View / Edit

Assign Subgroup Access

Assign Reporting Rights

Close

Reporting Structure

Roles

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"/>

Add

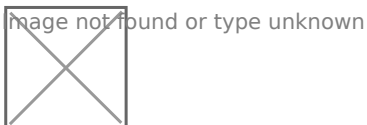
Delete

Add Multiple Roles

Reporting Structure

Roles

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

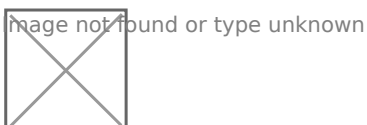


The Add Multiple Roles screen will open.

- 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

?

Search

e-Learning Programmes 1

Discussion Forum

My Achievements 18

[Discussion Forum](#) » [Discussion Forum Question](#) » [Assign](#)

Quick Links

ASSIGN CATEGORIES TO EXPERT

Category Experts *

Eduard Dyason

Category *

Pathways

Performance Management

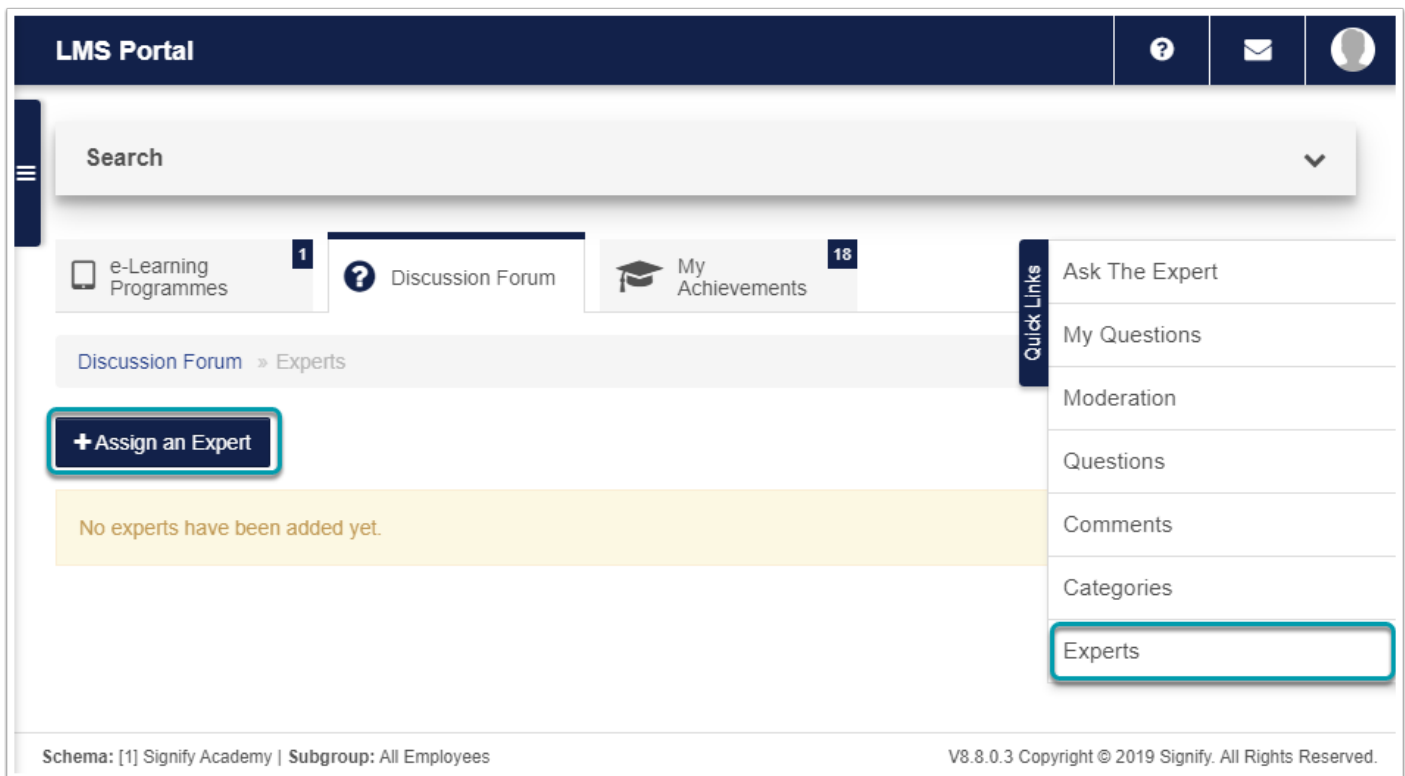
Assign

Back

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.



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

LMS Portal

?

Search

e-Learning Programmes

1

Discussion Forum

My Achievements

18

Discussion Forum

»

Discussion Forum Question

»

Assign

ASSIGN CATEGORIES TO EXPERT

Category Experts *

Eduard Dyason

Category *

Pathways

Performance Management

Assign

Back

- 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
<div>Actions</div> <div> <div>Edit</div> <div>Remove</div> </div>	Eduard Dyason (BA001)	Pathways
	yason (BA001)	Performance Management

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.



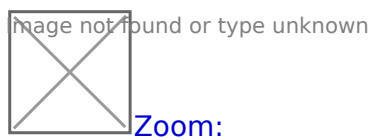
[Zoom:](#)

Overview of Fields

Field	Overview
Category	Select a Category from the drop down list.

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



Actions

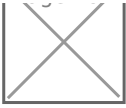
Click Actions:

- 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.