General Setup for Schemas

In Signify, Schemas are used to keep an organisation together in one unit. If your company has is a holding company and owns several other companies, management may want to retain the branding and culture of the companies within the group. If the companies have different values, different branding and different HR managers, consider using a schema to easily manage communication from the LMS. The purpose of this article is to elaborate on the steps required to create a new schema.

Requirements and Setup

Schema creation results in major system changed. The following precautions can assist in reducing any risk when creating a new schema:

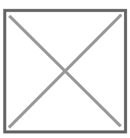
- Before you begin, **request a backup** to be made by sending an email to support@signify.co.za. Your responsible BA will be assigned on the Request and you will have someone from our team on standby should anything unexpected happen.
- Create the new Schema **on UAT** first. Complete the steps listed in these articles and make 100% sure that what you expect to see and do on the new schema is in line with your expectations.
- When creating the schema on LIVE, make sure to **do it after hours**. In line with the Backup request, Support can take the system offline for you to complete the configuration.

Navigate to System Administration | Users | Manage Users

A user must have specific rights to create a schema. On the List of Users page, complete the following steps to assign the appropriate access.

- Search for and select the user
- In the User Details section, check the Schema Administrator Option
- Click the Submit button at the bottom of the page

The user will now be able to create a new schema.



Create New Schema

Navigate to System Administration | Tools | Configuration | Schema Management

To create a new schema, click on the Add button. The Schema Management Details page will be displayed.

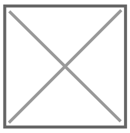
Zoom:

Below is a list of all the fields available on this screen and a description of the intention of each field.

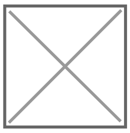
Field Name	Description
Schema Description	This will be then Schema name. For example Signify Software
Schema Prefix	This is a shortened version of the Schema name. For example SS
Item Order	This is the order of the Schema in the list. For example 4
Copy From Schema	Select the Schema you want to copy from
Schema SQL Criteria	More information regarding this field will be supplied as soon as possible.
Show On Portal	Checkbox is must be checked.
Always show on Primary Interface	Checkbox is must be checked.
Only Show to Current Division	Checkbox is must be checked.
Show "All Learning Programmes" link on interface	Checkbox is must be checked.
Show Learning Guides on Interface	Checkbox is must remain unchecked.
Show Advertised Events on Interface	Checkbox is must be checked.
Image URL for Schema Logo	Leave Blank.
Culture	Leave Blank.
Fiscal Year Start Month	This is the month the fiscal/financial year of the organisation starts on.

Switch to New Schema

System Administration Portal | Home (Icon) - Hover Only | Switch Schema

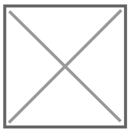


After creation the new schema, you must switch to the schema which was created to configure the schema. Click on Switch Schema to open the Schema Access Page.



- Select the new Schema you created from the Switch To Drop Down.
- Click the Switch Schema button.

The Administration Portal will open and you will see the Schema you have switched to in the bottom left corner of the screen.



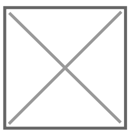
Define New Schema Administrator

Navigate to System Administration | Users | Mange Users

5.1. Assign Schema Administrator Rights

The first action to complete on the new Schema is to assign Schema administration access.

- Search for and select the user who will be the Administator of the new schema.
- On the User Information page, in the User Details section, check the Schema Administrator Checkbox.
- Click the Submit button at the bottom of the page.



Assign User Rights

From the left hand menu, select the Role Assignment Section to Assign the System Access Administrator Role to the new Schema Administrator.

Activate Modules

System Administration | Tools | Configuration | Framework | Modules | Set Active Value of Respective Modules

Create New Theme

System Administration | Tools | Configuration | Framework | Theme Management

Theme Key Management

System Administration | Tools | Configuration | Framework | Theme Key Management

New URL

Configure Basic Learning Store Login Page

System Administration | Tools | Configuration |

Banner: Width: 1815 x Height: 339

Configure Emails

System Administration | Tools | Configuration | Notifications | Emails | Notification - Global Settings

Revision #2
Created 2021-03-28 19:43:54 UTC
Updated 2021-03-28 19:53:52 UTC