



CONFIDENTIAL

# **SAP SuccessFactors LEARNING ADMINISTRATION TRANSITION GUIDE**

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## New Learning Administration Interface - Introduction

SAP SuccessFactors is planning to release a new Learning Administration interface in May 2020. As all major browsers will end support for Flash by the end of 2020, the new Learning Administrator user interface replaces all Adobe Flash elements with HTML-based elements. This document provides information about the new interface to help customers prepare in advance of its release.

More than just a technology change, the new Learning Administration interface will provide an enhanced user experience consistent with the SAP SuccessFactors suite of products. Customers will benefit from streamlined navigation and terminology, reorganized menus and field groupings. The redesigned menu removes duplicate functions, consolidates day-to-day tools and reorganizes menu options for optimal use. The Administration application, available on the Platform (BizX) Home Page, has a clean, modern look and includes a work area that can be expanded to a full screen, allowing administrators to focus on the task at hand. These enhancements make working within SAP SuccessFactors Learning easier and more efficient.

The new Learning Administration will be accessible from a dedicated tile on the Platform home page. The Flash version will remain available in its current location (Learning Administration link from Administrator Center) for 6 months after the new application is generally available, to allow Administrators time for the transition and for customers to carry out essential change management activities.

**IMPORTANT NOTE:** All customer-owned and created Flash-based Learning materials (courses, videos, etc.) are the responsibility of the customer to identify, update and change. Customers that have Premium Content Service (PCM) can receive assistance in identifying their Flash courseware.

**GUIDE LIMITATIONS:** The information contained in this document is for general guidance only. The images shown on the guide are using current terminology and do not reflect the new terminology, thus detailed level field terminology shown on the images may change. In addition, these images reflect a system with all the configurations enabled.

**UPCOMING FEATURES:** The following features are planned to be included in a later release; thus, are not covered in this guide:

- Recents
- Record Configuration – to be renamed to Entity Configuration.
- Bookmarks is also being considered for a future release.

## What's New in the Guide

Description	Date
<p>Access, Navigation, and General Guidance – Accessing the new and current administrator interfaces. Validated Customers note, update on selecting the new tile will navigate to the current Flash application interface.</p> <p>Terminology Changes – Areas in which terminology will not change. Translated major terms available on the Community Blog. Course Evaluation will change to Course Feedback.</p> <p>Noteworthy Layout Changes – Creating an Item function, changes from the Flash application interface.</p> <p>User Entity – editable and supported fields for users who are not authenticated via the HXM platform.</p>	<p>March 2020</p>
<p>Terminology Changes – Terminology Updated to include terminology changes for Purchase Order, Coupon ID, My Employees, Segment, Registration Form, External Requests. Accessing the Entities from the New Administration Navigation – For the entities menus to display from the menu navigation, at a minimum, an administrator must be granted a Search or Add workflow to the entity.</p> <p>Entity Manager – Section has been updated to include a supporting spreadsheet listing the functional/display and terminology changes per entity.</p> <p>Entity Header Fields – Describes the entity header fields and common entity header fields across entities.</p> <p>Tabular Related Entity Tabs – Describes the related tabs and common changes across the entity tab tables.</p> <p>Noteworthy Layout Changes – Covers current and new Administration user interface layout changes and behavior for Item Entity - Online Content Tab, the Class (Scheduled Offering) entity, and the User entity.</p> <p>Upcoming Features – List of features available in the second release of 2020.</p> <p>Preparation Checklist – Updated it to include additional guidance.</p>	<p>December 2019</p>
<p>Customer Transition Initial Guide</p>	<p>March 2019</p>

## 1. Terminology Changes

The SAP SuccessFactors Learning application's terminology is being improved for clarity, consistency, and alignment across the SAP SuccessFactors suite. These changes are intended to bring new insights, clearer administrator workflows and a simpler interface and will be available with the Preview Release on both the current and new Learning Administration interface.

**Language Packs Impact:** There is an impact to language packs. The Localization and Internationalization team has worked with language experts to translate terms to all 42 supported languages. The translation of major terms in all supported languages will be available on the *Translated Major Terms* spreadsheet which will be posted on the Customer Community Blog.

**Reports Impact:** The new terminology will be reflected on out-of-the box reports with the Preview Release. Custom reports which utilize the application label IDs and not custom created label IDs, will be impacted by the terminology change.

There are a few notable exceptions in which administrators will still see the previous terminology:

- Within API validation messages
- When editing email notification token sets (Notification syntax)
- When importing or exporting administrator roles
- When editing the system configuration syntax

### Terminology Changes of Major Learning Administration Terms

Listed below are major terms that are changing on the new Learning Administrator user interface. To see the Main Navigation terminology changes, see [Section 4](#). To see the nine (9) major entities fields terminology changes see [Section 5B](#).

LMS Area	Current Term	New Term	User Side Impact
Content	Document	Document Links	Yes, currently it is called Attached Documents
Content	Content Network	Open Content Network	No
Content	Follow-Up Evaluation: Application of Learning	Follow-Up Survey	Yes, currently it is called Survey
Content	Item Evaluation: User Satisfaction	Course Feedback	Yes, currently it is called Course Evaluation and will change to Course Feedback
Content	Questionnaire Survey	Survey	No
Content	Filename	URL	No
Class	Segments	Time Slots	Yes, currently it is called Segment
Class	Registration Form	Special Requests	Yes

LMS Area	Current Term	New Term	User Side Impact
Item	Blended Course	Instructor-Led with Online Content	Yes, currently it is called Instructor-Led and Online Course
Item	Length	Duration	Yes
Item	Thumbnail File	Image	No
Item	Learning Event	History Record	Yes
Finance	Order Ticket	Voucher	Yes
Finance	Subscription	Free-of-Charge Subscription	No
Finance	Purchase Order	Prepaid Account	Yes
Finance	Coupon ID	Coupon Code	Aligning with User interface
General	Notification	Email Notification	No
General	Subordinate	Direct Report	Yes, on the Manager (Supervisor) interface.
General	My Employees	My Team	Yes, on the Manager (Supervisor) interface.
Learning Activities	Requirements	Curriculum Requirements	Yes
Learning Activities	Group Instances	Class Groups	No
Learning Activities	Scheduled Offering	Class	Yes
Learning Activities	Slots Reserved	Reserved Seats	No
Learning Activities	Schedule Block	Resource Block	Yes
Library	Catalog	Library	Yes
Library	Subject Area	Category	Yes, currently it is called Topics
People	Classes	Cohorts	No
People	Group	User Group	No
Role	Alternate Supervisor	Alternate Manager	Yes



LMS Area	Current Term	New Term	User Side Impact
Role	Supervisor	Manager	Yes
System Administrator	Custom Columns	Custom Fields	No
System Administrator	Deployment locations	Content Deployment Locations	No
System Administrator	Domains	Security Domains	No
System Administrator	Global Variables	Global Application Settings	No
System Administrator	Record	Entity	No
System Administrator	Subdomains	Security Subdomains	No
System Administrator	Time Slots	Time frames	No
System Administrator	Workflows	Permissions	No
User	External Requests	External Learning Requests	Yes

## 2. Access, Navigation, and General Guidelines

### 2A. Accessing SAP SuccessFactors Learning Administration (Platform/Learning Integrated Environment)

A Learning Administrator with access to the current application will have access to the new “Learning Administration” tile once the new administrator User Interface is generally available. The new tile will be present on the Platform Home Page from which the Administrator can access the new Learning Administration application as shown in the image below.

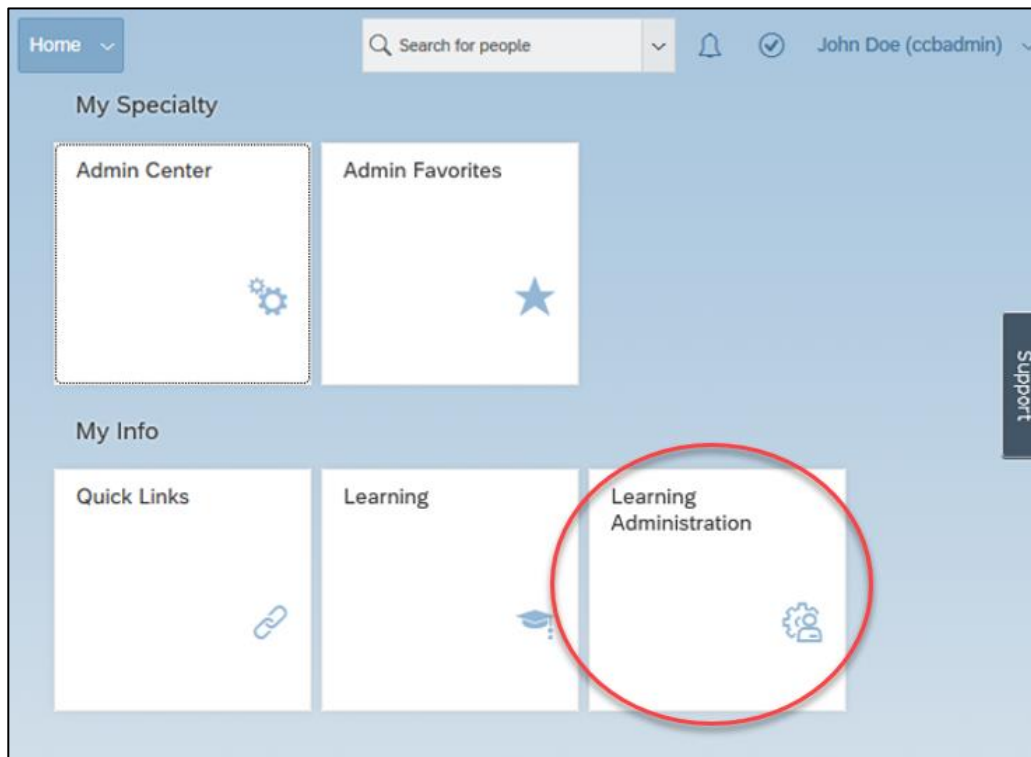


Figure 1.1 – Platform Home Page

An administrator will continue to have access to the current administrator interface by selecting the Admin Center menu option from the Platform Header, and then selecting the Learning Administration link. To access the new interface, an administrator will select the Home menu option from the Platform Header, and then select the “Learning Administration” tile.

**Note for Validated Customers (VSaaS):** The new administrator interface will be available on VSaaS Preview and Sandbox environments with the 1H 2020 Release. On selecting the Learning Administration tile in production environments, administrators of validated customers will be navigated to the Flash application interface until Learning production is upgraded in November 2020.

### 2B. How to Customize the Administrator Learning Home Page Content

Home displays the contents of the “Introduction Panel ID” selected in Flash System Administration> Configuration> Global Variables. If “Introduction Panel ID” is set to custom created panel, that custom

panel content is preserved. The out-of-the box *Welcome to SuccessFactors Administration* video/tutorial and the administrator Quick Links currently on the Learning application homepage will not be available in the new administrator interface. If “Introduction Panel ID” is set to DEFAULT\_ADMIN\_INTRO, this will be modified to DEFAULT\_LEARNING\_ADMINISTRATION\_INTRO during the upgrade process. Both of these panels will be non-editable. The new default intro panel contains an image and a message to the administrator in label ID label.ADMIN\_HOME.WelcomeMessage. Customers that edited the default admin intro *label* should use the recommend customization approach and copy any wanted content to a newly created intro panel. The previous default intro panel will be removed when Flash is removed.

For customers that want their custom content on the home page to prepare for this change, an administrator with proper permissions can set up an introduction message which is displayed to administrators on accessing the administration application by creating a new User Introduction from *System Administration > Application Administration > User Introductions* and then select it as the default introduction message from the Introduction Panel ID drop-down option in *System Administration > Configuration > Global Variables* page.

## 2C. Accessing the Entities from the New Administrator Navigation

Workflows that grant access to entity menus have been made more straightforward in the new administrator navigation. Currently, access to each entity menu is granted to an administrator based on that entity’s ‘Search’ or either the ‘Edit’ or ‘View’ workflows. In the new Learning Administrator navigation, the ‘Search’ or ‘Add’ workflows will grant access to a menu. For instance, to access the Library (Catalog) menu, either the Search Library (Catalog) or Add Library (Catalog) workflows will grant access to the Library (Catalog) menu within the Learning Activities main menu. Administrator ‘View’ or ‘Edit’ Library (Catalog) workflows will grant further access.

**Note:** The out-of-the-box system roles and any custom roles created for your organizations, which consist of permissions (workflows), will **not** be impacted.

## 3. New Administrator Navigation

When accessing SAP SuccessFactors Learning, administrators will see the new administrator interface. Below is an example image of the new administrator interface. Note that these options are highly dependent on the system’s configurations and permissions granted to an administrator.

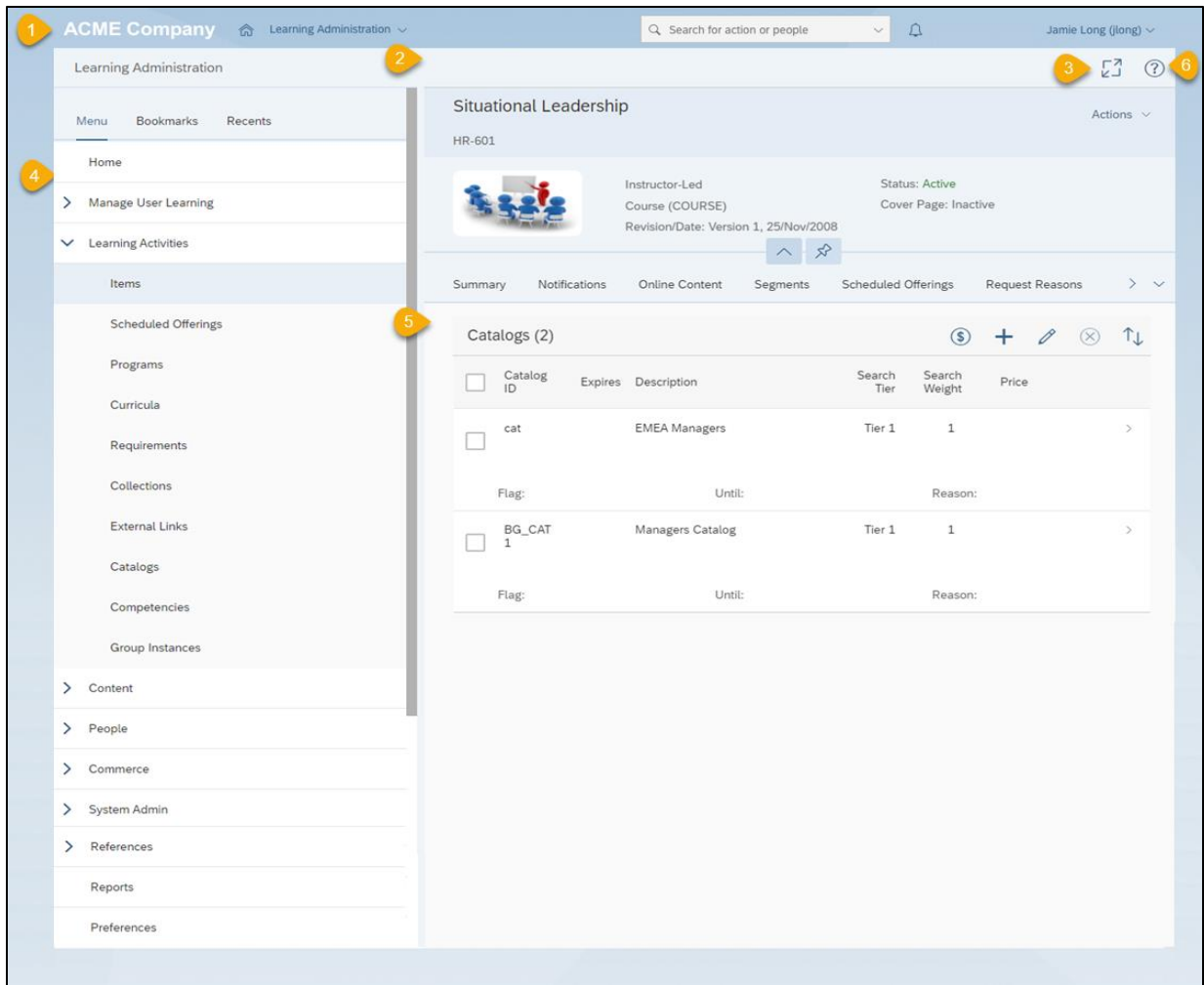


Figure 1.2 – New Administrator Interface Navigation

### New Administrator Navigation Components and Description

Components	Description
1. Human Experience Management Platform Header	Available on all pages as the administrator navigates within SAP SuccessFactors Learning.
2. Header Toolbar	Component sits above the Entity Header and is displayed when the administrator navigates within SAP SuccessFactors Learning. In addition, this contains the Full Screen Mode feature and access to online help.
3. Full Screen Mode	On selection, the left-side Menu Navigation will either show or hide. It expands the Workspace Area as it increases the real estate for the administrator to work with.
4. Menu Navigation	In the current Administrator interface, these are the top horizontal menus which on selection render a left-side vertical menu of additional functions. The new design follows a tree navigational structure on the left side of the page, granting access to a primary menu, with secondary and tertiary menus rendering the relevant menu options.  Manage User Learning:

Components	Description
	<ul style="list-style-type: none"> <li>• Manage User Learning is a new primary menu which consolidates current tools that are used to manage a user’s learning. This provides the administrator with a focal point to conduct tasks such as assigning and adding to a user’s learning history.</li> </ul> <p>Manage Email:</p> <ul style="list-style-type: none"> <li>• Manage Email is a new menu created under the System Administrator primary menu. It groups the tasks that relate to setting up email notifications.</li> </ul> <p>Relocated Menu Options:</p> <ul style="list-style-type: none"> <li>• Currently, Tools exist under the main menus Users, Learning, Content, and System Administrator. The functions within Tools have been moved and organized under appropriate primary menus to provide an organized menu structure.</li> <li>• Content Network, Activate/Deactivate Content Network and, Tasks have been moved to secondary menus under the Content primary menu. Currently these functions exist under the Learning main menu.</li> <li>• Instructors has been moved to People, as it is the interface for creation and management of people who are Instructors.</li> </ul> <p>To see the full updated menu navigation structure, see <a href="#">Section 4 Menu Navigation Structure</a>.</p> <p>Removed Menu Options: Some menus and functions have been removed because they were either a duplicate of another function in the system or are no longer supported. See <a href="#">Section 9 Removed Functionality for more information</a>.</p>
5. Workspace Area	<p>The workspace area is the area to the right side of the menu navigation. It renders the pages driven by the selections made from the menu navigation. When an entity search is conducted, the workspace area will present the current search functionality. When creating, editing, or managing one of nine (9) major entities, the workspace area will render the entity manager which is the new look and feel to access the entities in the system. See <a href="#">Section 5 The Workspace Area for more information</a>.</p>
6. Question Icon	<p>The Help documentation is available by selecting the question mark icon.</p>

## 4. Menu Navigation Structure

To download the current menu navigation and terminology mapped to the new menu navigation structure and terminology, please [click here to learn more](#).

## 5. The Workspace Area

The workspace area located to the right-side of the menu navigation, renders the search functionality, the entity manager, and overall system administrator functions, including system configuration, references, and overall administrator management tasks.

### 5A. Search Functionality and System Administrator Functions

Search functionality across all the entities and system functions such as Automatic Processes, Connectors, Background Jobs, Environment, Configurations, including current Tools will remain as currently designed.

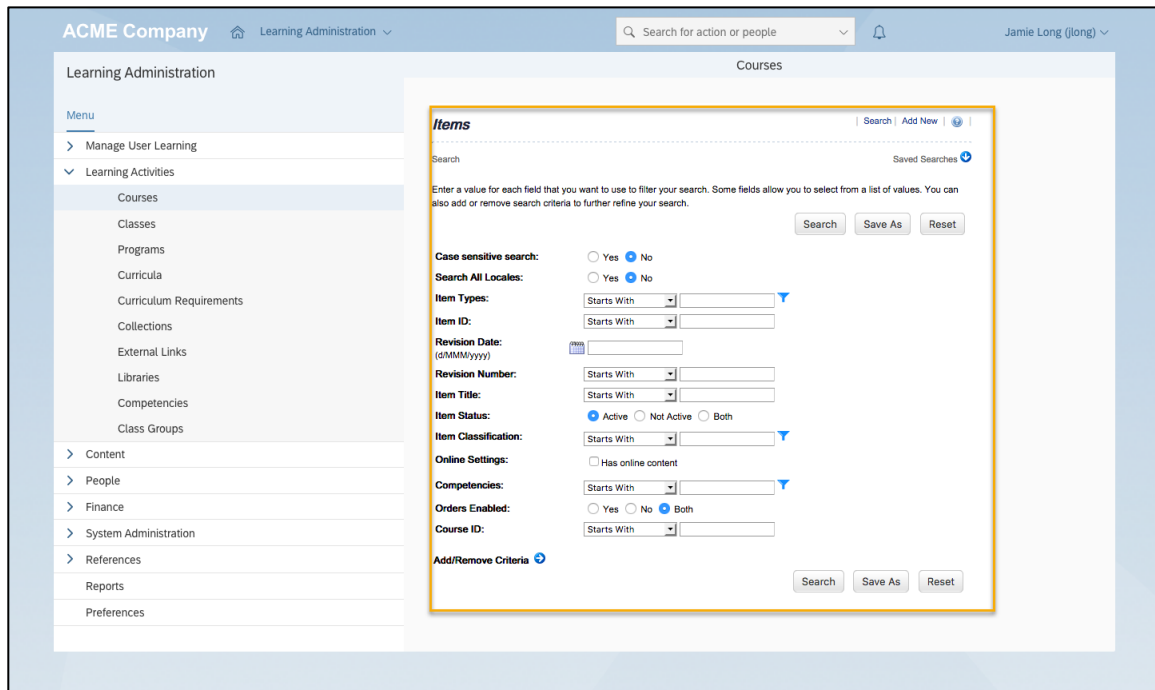


Figure 1.3 – Search Functionality

### 5B. Entity Manager

The Entity Manager is the new layout presented when creating, editing, or managing the nine (9) major entities in the system, which are:

- User
- Assignment Profile
- Item
- Class (Scheduled Offering)
- Library (Catalog)
- Curriculum
- Coupons
- Free-of-Charge Subscriptions (Subscriptions)
- Prepaid Account (Purchase Order)

The Entity Manager is made-up of three main components:

- The Entity Header

- The Entity Tabs
- The Entity Detail Area

For detailed functional and terminology changes, for each of the nine (9) major entities, [access the Entities Field Changes spreadsheet](#). It contains the entities' header, actions, the entity details tab fields (summary tab), and all the supported related entity tabs per entity. Below is an image and a descriptive table of the entity manager and its components.

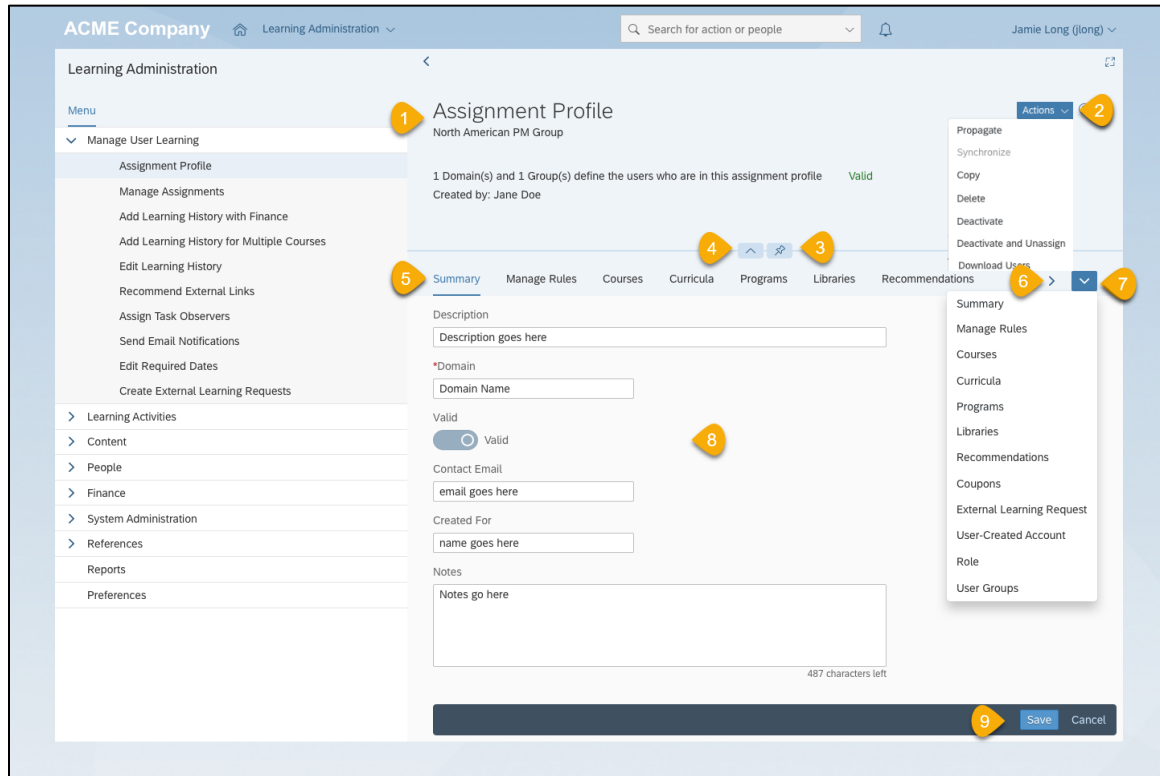


Figure 1.4 – Entity Manager Navigation

### Entity Manager Components and Descriptions

Components	Description
1. Entity Header	The Entity Header provides immediate entity information. It contains primary information such as title, description, respective entity status, and additional entity specific information, such as the average rating for Items. See Entity Header Fields for more information.
2. Header Actions	Depending on the entity and the permissions granted to the administrator, the header actions will display the relevant actions the administrator can take against the entity. For instance, if the entity is an Item, then one of the header actions will display the Assign action.
3. Push-Pin Icon	Located below the Entity Header, on selection, the Push-Pin icon pins the entity header, making it static, so an administrator can scroll to view the data that is on the entity detail area while the header remains visible.
4. Caret Arrow Icon	Located next to the Push-Pin icon, on selection, the Caret Arrow icon shows or hides a portion of the Entity Header.

Components	Description
5. Entity Tabs	In the current Administrator user interface, these are all the Related and Related More tabs available from an entity. With the new design, all the related associations pertaining to the entity will be shown in a tab across the top of the entity detail area. See <a href="#">Section 6B Entity Tabs for more information</a> .
6. Entity Tabs Overflow Arrows	Scrolls to the end or beginning of related associated tabs by selecting the right or left arrow of the entity tabs, respectively.
7. Entity Tabs Drop-Down	Displays a complete menu of the entity tabs per entity.
8. Entity Detail Area	A central area where the administrator can perform multiple tasks such as create, edit, and manage an entity. The Entity Detail Area renders specific fields, settings, and functions based on the entity tab that is selected.  <b>Note:</b> The date, time, and number patterns that are shown in an empty field, as an example/hint of how it should be completed, is configured on the Locale's patterns. This is located within the References > Manage Labels > Locales menu option.
9. Entity Footer	Save and Cancel actions are available for the administrator to save or cancel the entered information.

**Record Configuration:** The Record Configuration feature, which allows an administrator to configure fields and tab order of the nine (9) major entities and corresponding admin personalized views, will not be offered in the new Learning Administration application, however it will be available from the current Learning administrator interface; since both the new and current learning administration application will leverage the same database data for determining display of fields and whether they are required, any changes to record configuration field display or required fields applied from the current learning administration will be reflected on both the new and current application.

When the new Learning administration is available, the existing tenant level record configurations that have been defined for field display and mandatory fields will be honored and can still be updated via the current Learning administrator interface. The Record configuration feature is an upcoming feature which will be supported from the new administration interface in a future release.

## 6. Common Components Across All Entities

### 6A. Entity Header Fields


The header of each of the nine (9) major entities displays immediate information available to the administrator. The information listed on the header derives from the entity's detail tab (summary tab) and its related tabs. As an example, the image below illustrates the Item Header.



## Item Entity Header

Heat and Cold Exposure Management (HAZWOPER) Actions ▾

SS-EHS-439

 Online Status: Active  
Online Course (ONLINE) Cover Page: Inactive  
Revision/Date: Version 1, 11/17/2009


Summary Notifications Online Content Segments Scheduled Offerings Request Reasons Requests Catalogs Subject Areas Curricula 

Figure 1.5 – Item Header

## Common Entity Header Fields Across All Entities


Each entity header displays relevant information pertaining to the entity. Listed below are common fields across all the entities.

- Title or Description
- Entity ID
- Entity Image if applicable
- Entity Status


## 6B. Entity Tabs


The Entity Related Tabs of each of the nine (9) major entities are displayed across the top of the entity detail area. Availability of an entity related tab depends on the permissions (workflows) granted to an administrator. Upon accessing an entity, the entity details tab (Summary Tab) is the default landing tab which will render in edit mode if permission to edit was granted. All other entity tabs will render as view only; if an administrator has permission to edit an entity detail field or related information, the 'Pencil icon' is available.

## Entity Details Tab (Summary Tab) – Default Landing Tab


Summary Notifications Online Content Segments Scheduled Offerings Request Reasons Requests Catalogs Subject Areas Curricula 


Extended Summary

Title: Heat and Cold Exposure Management (HAZWOPER)  56 characters remaining

Audience: No audience in current locale  300 characters remaining

Length: 1000 hours


Delivery Method:  +

Source:  +

Credit Hours: 1000 hours

Contact Hours: 1000 hours

CPE Hours: 1000 hours

Description: This training is intended for personnel who may be exposed to temperature extremes at hazardous waste sites. Heat-related illness is a major hazard, especially for workers wearing 

Save Cancel

Figure 1.6 – Entity Detail Tab – Edit Mode

## 6C. Tabular Related Entity Tabs

Depending on the entity and the selected entity tab, the data associated may be presented in a table format. If data has not been associated, the table will present a message explaining there are no associations with the entity. The functions available via the table toolbar are specific to the related entity tab.

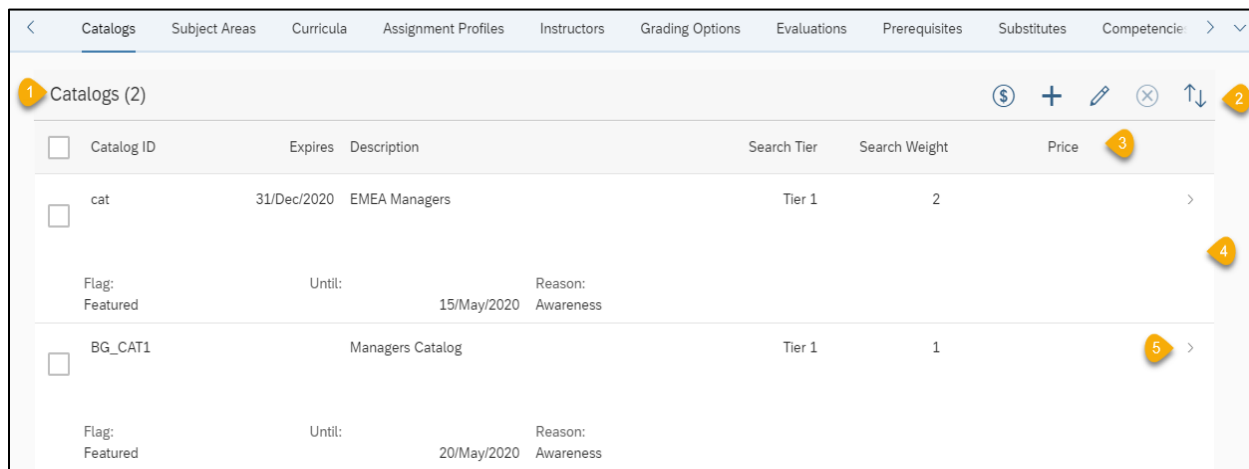


Figure 1.7 – Entity Related Tabs – Table and Table Toolbar

### Entity Related Tabs Table Components and Descriptions

Table Components	Description
1. Table Title	Displays the Entity Tab title followed by the number of associations tied to the entity in parentheses. Example: Classes tab menu is selected and the associated classes with the Item would display as “Classes (14)”
2. Table Toolbar	<p>The Table Toolbar is available within specific entity tabs where the associated data is presented in a table format. The Table Toolbar includes functions relevant to the related tab and depending on the permissions granted to the administrator, may include Add, Copy, Edit, Remove, Sort, and Grouping functions.</p> <p>If no associations have been made yet, then the only active function is the Add function; all other functions will be disabled.</p> <p>If the administrator only has view permission, then only Sort and Grouping (if applicable) functions will be available. The Add, Edit, and Remove functions will not be available.</p> <p><u>Table Toolbar functions are as followed:</u></p> <p><b>Dollar Sign Icon</b> – This function is specific to the Library (Catalog) entity tab within the Item entity. On selection, it displays the Change Library Price dialog window.</p> <p><b>Add Icon</b> – This function displays the related association search function. The administrator can conduct a search and select from the search results to Add and make the association.</p>

Table Components	Description
	<p><b>Pencil Icon</b> – On selection, the data within the related tab becomes editable. The administrator can make edits if needed and either save or cancel the changes.</p> <p><b>Remove Icon</b> – At least one of the related data’s checkbox must be selected for the remove icon to become active. Upon selection, the association is removed.</p> <p><b>Sorting Icon</b> – On selection, a dialog window prompts the administrator to select the column to sort by and whether it should be in an ascending or descending order. This function is only available for tables and columns where it is sensible. Note that most dates are not yet sortable per chronological order.</p> <p><b>Group Icon</b> – On selection, a dialog window prompts the administrator to select which column to group by and whether it should be in an ascending or descending order. This function is only available for tables and columns where it is sensible. (Not shown on image)</p>
3. Table Column Header	Displays the column title for each of the columns. It expands and collapses to show all the supported tabs when Full Screen is selected/deselected.
4. Table Row	Each data is displayed from a row. All the rows become editable when the Pencil icon is selected.
5. Navigate Function	Available in the form of an angle bracket (>) for each data row. On selection it navigates directly to the selected entity’s detail area. This function is only available to administrators who have permission (workflow) to the corresponding entity.

**6D. Common Changes Across Entity Related Tab Tables**

1. Upon initial display, the table information will be read only. An administrator with edit permission will see a ‘Pencil icon’ that can be selected to edit the table information.
2. The ID of each related entity will be visible as a new column on each table.
3. Sorting will be available for most columns within tables.
4. The Group function will be available, where sensible, for further organization within tables.
5. If a related entity does not have a value for the title in the administrator’s preferred locale, tenant locale or English, then the field will display blank, instead of the words “No Title”.

**6E. Validation Error Indication and Error Messages**

If any of the required fields and/or settings are left blank or do not meet the validations, the system will outline the field in red. A message will outline the fields that require attention.



Figure 1.8 – Error Indicators

Additionally, where numeric values are required, the warning messages are more concise and clearer. For instance, the current warning “The number entered is too large.” Has been improved to “Please use a whole number between 0 and 99,999”. Error and warning validation instructional messages have been improved for clarity across the application.

## 6F. Confirmation Message Toast

A popup confirmation message displays for a few seconds on the successful modification of an entity.

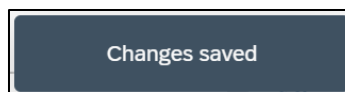


Figure 1.9 – Changes Saved Confirmation Dialogue

## 7. Noteworthy Layout Changes

In addition to an enhanced user experience through a common entity manager layout, there are noteworthy layout changes in the Item related tab Online Content, the Class (Scheduled Offering) related tab Registrations, and the User entity. The next four sections of this guide will cover these administrator interface changes.

### 7A. Creating an Item

Creating a new item is easier and no longer requires a type selection and walkthrough a wizard. On the new administrator interface, an item is created by completing a form. When the form is saved, the item is created with a default classification of Other. Based on the associations built with the Item, then the Item’s classification is automatically updated.





The administrator can build an Agenda Template (Segments) to create an Instructor-Led Item, set the completion status for online content or build the online content structure to create an Online Item, or have both an Agenda Template and Online Contents to create an Instructor-Led with Online Content Item (Blended). If neither an Agenda Template nor Online Content is associated or Completion Status set, then the Item’s classification will remain as Other. The classification External-Course will continue to be used for Items that are hosted by Online Content Network providers. The classification Other will continue to be used for items that have Tasks associated or Items that are physical goods, such as a book. The following images show the current step-by-step wizard and the new user interface for the Add New Item function.

## Add New Item

### Current

Add New Item

Please select the type of item you would like to add:

 <b>Class</b> This item will be scheduled at specific dates and times, with the option to assign instructors and locations. <b>Example:</b> Classroom course	 <b>Online Only</b> This item will have associated online content that can be launched and completed at any time. <b>Example:</b> Web-based tutorial
 <b>Class and Online</b> This item will contain both class and online components.	 <b>Other</b> This item will be neither class nor online, and actions must be taken outside of the system to complete it. <b>Example:</b> Read a book

Please select a locale associated with the new item:  
Item attributes entered as text will be saved in this locale. After the item has been created, you can view values in all locales by clicking the globe icon.

Add New Item

**Summary** Change type of item or primary locale

Enter Basic Information

\* Required Fields

\* Item Type:  +

\* ID:   Auto Generate ID

\* Title:  Enter text in English (English)

Description:  Enter text in English (English)

\* Security Domain:  Default Public Access Domain (PUBLIC) 🔍

Approval Process:  (SUPV) +

Approval Required:  No

Credit Hours:  0.00

Save & Exit Cancel

### New

Add New

Items

> Add New

Add New Item

\* Required Fields

Add Reset

\* Locale:  English

\* Item Type:

\* Item ID:   Auto Generate

Revision Date:  (GMMMA/YY)

Revision Time:  (hh:mm:ss)

Revision Number:

Title:

Classification:  Other

Source ID:

\* Security Domain ID:  PUBLIC 🔍

Delivery Method:

Assign. Type ID:  +

Approval Process ID:  +

Approval Required:

Shipping Required:

Safety Related:

Approved:

Active:

Auto Enroll from Waitlist:

Auto Record Competency Rating on Item Completion:

User can Add to Learning History:

Managers can Add Learning History for direct reports:

Create Date:  (GMMMA/YY)

Prevent Multiple Class Registration Interval:  (1000)

Description:

Comments:

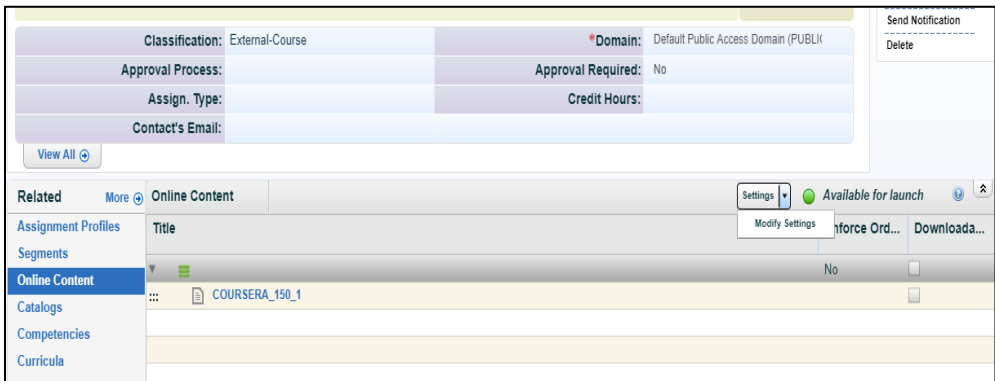
## 7B. Item Entity – Online Content Tab

Building the Online Content association to an Item has been streamlined by both reducing the steps required to add Online Contents to an Item and by displaying only the fields and settings relevant to the Online Content type. In the current Learning administrator user interface, the administrator must define the Online Content settings and other attributes when the Online Content is being added to the Item. Once completed, the administrator defines the settings for the entire Online Content from the Modify Settings option. In the new Learning administrator interface, the administrator adds the Online Contents and organizes the content structure first, then defines settings that drive the launch, user course progression, completion, and objectives behavior. These settings may be specific to a content type in the structure, or apply to the entire Online Item.

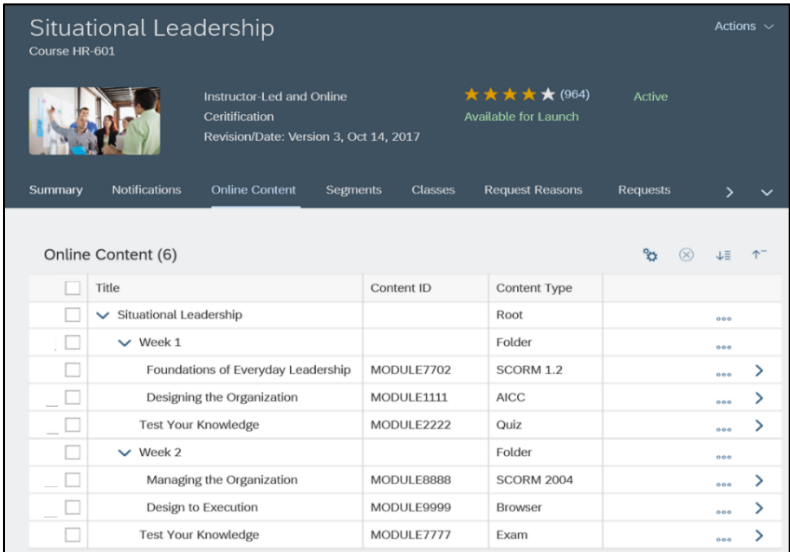
This restructure of Item and Online Contents association results in a streamlined experience, while maintaining the same functionality as the current Learning Administration. Below, are images of the Online Content tab from both the current and new administration user interfaces.

### Online Content Tab

#### Current



#### New



☐	Title	Content ID	Content Type	
☐	▼ Situational Leadership		Root	...
☐	▼ Week 1		Folder	...
☐	Foundations of Everyday Leadership	MODULE7702	SCORM 1.2	... >
☐	Designing the Organization	MODULE1111	AICC	... >
☐	Test Your Knowledge	MODULE2222	Quiz	... >
☐	▼ Week 2		Folder	...
☐	Managing the Organization	MODULE8888	SCORM 2004	... >
☐	Design to Execution	MODULE9999	Browser	... >
☐	Test Your Knowledge	MODULE7777	Exam	... >

## Online Content Tab Components

Online Contents that are associated with an Item will be available from the Online Content tab. An administrator can add additional Online Contents, organize them, make edits, delete, and navigate to the Online Content settings page where settings are defined per each Online Content. Below is an image of the Online Content tab and a descriptive table of its components.

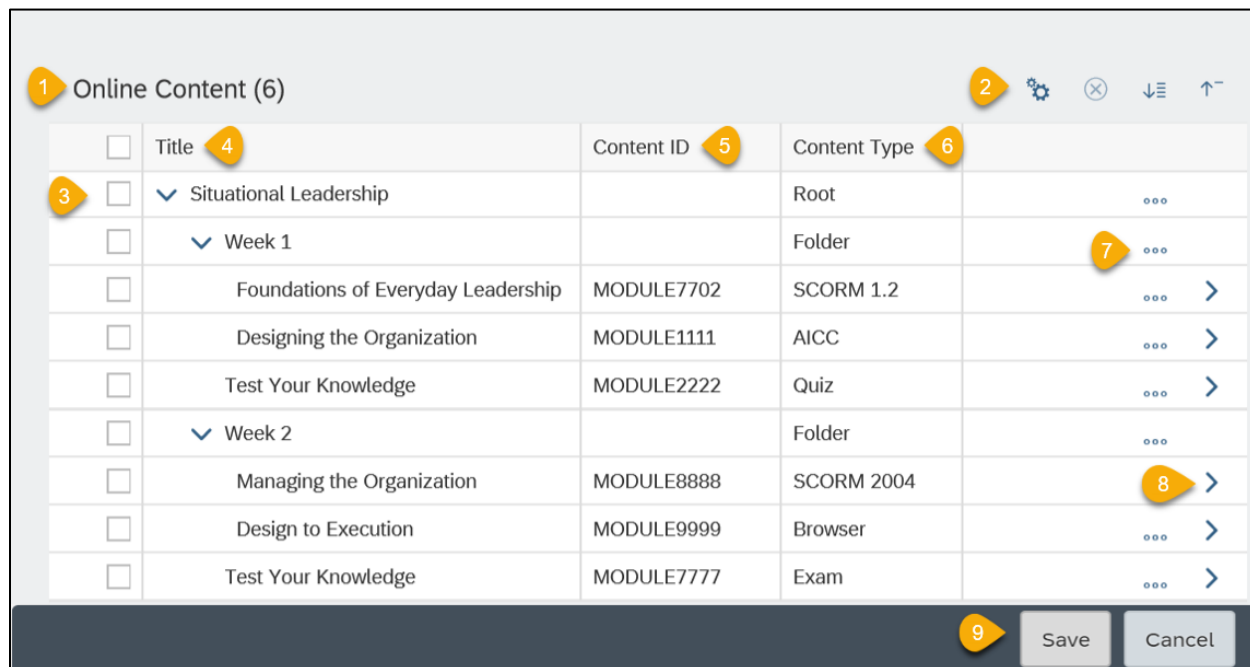


Figure 2.0 – Online Content Page

## Online Content Page Components and Description

Components	Description
1. Tab Title	Displays the Online Content Tab Title followed by the number of Online Contents associated with the item in parenthesis. Example: Online Contents (7). The Root and Folder content types do not count towards this number.
2. Table Toolbar	The Table Toolbar includes the following functions: <ul style="list-style-type: none"> <li>• Online Content Settings – See the <a href="#">Online Content Settings</a> Section for detailed information.</li> <li>• Remove – on selection, removes the association.</li> <li>• Expand All – on selection, displays all the Online Contents that are part of the content structure.</li> <li>• Collapse All – on selection, collapses all the Online Contents and only displays the root and folder rows.</li> </ul>
3. Checkbox	Available per each Online Content, the checkbox works in conjunction with the remove function that is available from the Table Toolbar.
4. Title	Displays the title of each of the added Online Contents. Each Online Content is shown as it has been organized by the administrator.
5. Content ID	Displays the content ID per each Online Content.

Components	Description
6. Content Type	<p>Displays the type of content that has been added. These are the types of Online Contents:</p> <ul style="list-style-type: none"> <li>• Root – represents the Item Title</li> <li>• Folder – defines how the content is to be completed by the user as organized within the folder</li> <li>• AICC, SCORM, Browser, Document – Launch method</li> <li>• Exam Object – PQE</li> <li>• Quiz</li> <li>• Exam</li> <li>• Content Package</li> </ul>
7. Overflow Menu	<p>The overflow menu, represented by the three (3) dots, display different actions depending on the selected content.</p> <p>If selection is from the Root, then the content options are:</p> <ul style="list-style-type: none"> <li>• Add Content Object</li> <li>• Add Content Package</li> <li>• Add Assessment</li> <li>• Add Exam Object – PQE</li> <li>• Create New Folder</li> </ul> <p>If selection is from a Folder, then the content options are:</p> <ul style="list-style-type: none"> <li>• Add Content Object</li> <li>• Add Content Package</li> <li>• Add Assessment</li> <li>• Add Exam Object</li> <li>• Create New Folder</li> <li>• Edit</li> <li>• Move</li> </ul> <p>If selection is from an individual content type, then the options are:</p> <ul style="list-style-type: none"> <li>• Edit</li> <li>• Move</li> </ul> <p>When adding content from a Root or a Folder, the content will be added as the last row on the Root or Folder from where the action to add was selected.</p>
8. Caret Arrow Icon	<p>On selecting the Caret Arrow icon, the administrator will navigate to the online content object.</p>
9. Entity Footer	<p>Save and Cancel actions are available for the administrator whenever updates are made to the Online Content tab or if any changes were made to the Online Content Settings page.</p>



## Online Content Tab Without Any Online Contents Associated to the Item

When there are no Online Contents associated with the item, a corresponding message is shown followed by an option to select a content type and start building the content structure.

### Online Content Tab Without Any Content Types

**Current**

**New**

## Adding Online Contents to an Item

When adding an Online Content to an Item, the administrator will focus on simply adding the Online Contents to the Item and building the content structure. Below are the different content types that can be associated with an Item.

### Add Online Contents to an Item

**Current**

**New**

The administrator selects the option to add an Online Content. By default, the first option is to Add a Content Object, followed by the other Online Contents and the option to Create a New Folder. The order in which these are available from the menu has been decided based on best practices.

### Add a Content Object to an Item

#### Current

**Add Content Object**

\*Required Field(s)

\*Content Object:

\*Object Name:

Parameters:

Mastery Score:  (Range 0-100)

Mark this object complete when launched

Use Objectives: No content object selected

**Add To Folder**

Save in Folder:

Changes will be saved when you click "Save" on the Online Content page.

#### New

**Add Content Object**

\*Content Object

\*Object Name

The administrator searches for a content object that has already been created and selects it. Provides the object title and selects option to confirm or cancel.

No other setting is defined from this dialogue.

**Note:** The Use Objectives function from the dialogue has been discontinued and will not be part of the new administrator interface. However, the use of Objectives is still supported and is managed from the Content Object entity, where objectives can be associated.

### Add a Content Package to an Item

#### Current

**Add Content Package**

\*Required Field(s)

\*Content Package:

**Add To Folder**

Save in Folder:

Changes will be saved when you click "Save" on the Online Content page.

#### New

**Add Content Package**

\*Content Package

The administrator searches for a content package that has already been created and selects it. Selects option to confirm or cancel.

No other setting is defined from this dialogue.

### Add an Assessment to an Item

#### Current

#### New

The administrator searches for an assessment that has already been created and selects it. Provides the Assessment Name and selects option to confirm or cancel.

No other setting is defined from this dialogue.

### Add an Exam to an Item

#### Current

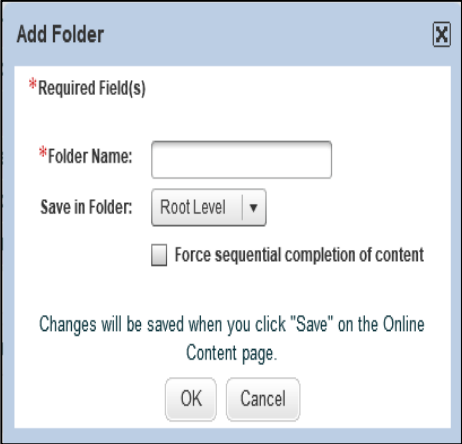
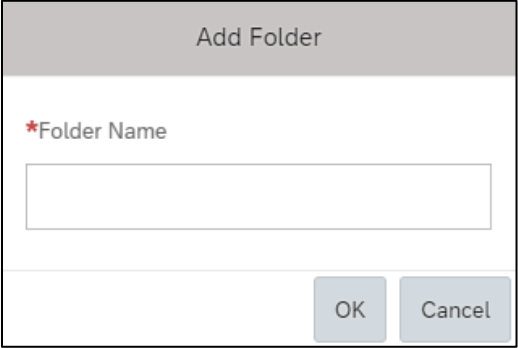
#### New

The administrator searches for an exam that has already been created and selects it. Provides the exam title and selects option to confirm or cancel.

No other setting is defined from this dialogue.

**Note:** The Time Exam and Review Options available from the current Add Exam Object dialogue will no longer be available in the new Learning administrator interface. These settings work in support of the Exam Object (PQE) content object which will be deprecated at the end of 2020.

**Create a Folder**

Current	New
	
	<p>The administrator selects the option to create a folder. Provides the folder title and selects option to confirm or cancel.</p> <p>No other setting is defined from this dialogue.</p>

**Save or Cancel from the Online Content Tab**

Once the administrator adds the Online Content, then the Save or Cancel options are presented. On selecting save, the administrator may see the validation error indication with the detailed messages the administrator must address on the Online Contents or Online Settings dialogue.



Figure 2.1 – Save and Cancel buttons

## Online Content Settings

In the current administrator user interface, the administrator defines the completion status, the system behavior after completion, and other settings per content type as they are adding these to the item. In the new administrator user interface, all these settings are completed from the Online Content Settings dialogue, which displays the Online Contents as they were organized by the administrator, along with the different settings needed to define the Launch, Course Progression, Completion and Objectives for the item.

By default, the Launch tab is the first tab shown. The order in which these tabs are displayed aligns with the order in which the user interacts with the online item; from launching the course, progressing through course, to completion. Improvements have been made to display only the relevant fields based on the Online Content type that was added to the item; for instance, the administrator will only see a failure status field if the Online Content added is an Exam Object, Assessment, AICC or SCORM. Below are the images of each of the Online Content settings tabs with a descriptive table of each field and setting.

### Launch Tab from Online Content Settings Dialogue

On this tab the administrator defines the launch behavior of the Online Contents.

6 Title	7 Content Type	8 Downloadable	9 Restrict Access to Other Objects When this Assessment is in Progress	10 Parameters
<ul style="list-style-type: none"> <li>▼ Situational Leadership</li> </ul>	Root	<input checked="" type="checkbox"/> *URL for Download <input type="text"/>		
<ul style="list-style-type: none"> <li>▼ Week 1</li> </ul>	Folder			
<ul style="list-style-type: none"> <li> <ul style="list-style-type: none"> <li>Foundations of Everyday Leadership</li> </ul> </li> </ul>	SCORM 1.2	<input type="checkbox"/>		<input type="text"/>
<ul style="list-style-type: none"> <li> <ul style="list-style-type: none"> <li>Designing the Organization</li> </ul> </li> </ul>	AICC	<input checked="" type="checkbox"/>		<input type="text"/>
<ul style="list-style-type: none"> <li> <ul style="list-style-type: none"> <li>Test Your Knowledge</li> </ul> </li> </ul>	Quiz		<input checked="" type="checkbox"/>	
<ul style="list-style-type: none"> <li>▼ Week 2</li> </ul>	Folder			
<ul style="list-style-type: none"> <li> <ul style="list-style-type: none"> <li>Managing the Organization</li> </ul> </li> </ul>	SCORM 2004	<input type="checkbox"/>		<input type="text"/>
<ul style="list-style-type: none"> <li> <ul style="list-style-type: none"> <li>Design to Execution</li> </ul> </li> </ul>	Browser		<input type="checkbox"/>	
<ul style="list-style-type: none"> <li> <ul style="list-style-type: none"> <li>Test Your Knowledge</li> </ul> </li> </ul>	Exam			

11 OK Cancel

Figure 2.2 – Online Content Settings Launch Tab

## Launch Tab Components and Description

Fields & Settings	Description
1. Tab Title	Displays the Launch Tab Title.
2. Content is Available for Launch	Switcher to indicate when the Online Contents are ready to be accessed by the user. If this setting is set to ON, then on saving the Online Content tab, the Item header will update the field from Not Available for Launch to Available for Launch.
3. Contents Available Only During Specified Segments of a Scheduled Offering	This switcher is only available when the Item is a Blended Item (Instructor-Led with Online Content Item).
4. Skip Content Structure Page on Launch	<p>This setting indicates system behavior when a user launches the course. The system either presents the Content Structure page or skips it and takes the user directly to the first incomplete Online Content.</p> <p><b>Note:</b> This setting is not available if Course Home is enabled as the user is always taken to the Course Player upon launch.</p>
5. Days from Launch to Expiration	This textbox is for the administrator to indicate the number of days a user has, after launching the content, before their progress resets because of inactivity and they must start the course from the beginning.
6. Title	Displays the object title of each of the Online Contents that have been added. Each Online Content is shown as it has been organized by the administrator.
7. Content Type	Displays the type of content that has been added.
8. Downloadable	This column is for the administrator to indicate if the user can download the Online Content if administrator selects the checkbox. On selection, a field is available to provide the URL.
9. Restrict Access to Other Objects When This Assessment is in Progress	This column is for the admin to indicate if the user is restricted from accessing other Online Contents while taking the corresponding assessment.
10. Parameters	This field is for content launch URL Parameters
11. OK, Cancel	The administrator either confirms or discards the fields and settings made.

## Course Progression Tab from Online Content Settings Dialogue

On this tab the administrator defines the course progression of the Online Contents.

Online Content Settings

Launch **1 Course Progression** Completion Objectives

<b>2 Title</b>	<b>3 Content Type</b>	<b>4 Force Sequential Completion of Content</b>	<b>5 Enable Assessment Review</b>	<b>6 Exam Duration</b>
▼ Situational Leadership	Root	<input type="checkbox"/>		
Achieving Your Leadership Potential	SCORM 1.2			
Leadership Quiz	Quiz		<input type="checkbox"/>	
Workplace safety	SCORM 1.2			
Exam	Exam Object (Legacy)		<input type="checkbox"/>	01:00

**7** OK Cancel

Figure 2.3 – Online Content Settings Course Progression Tab

### Course Progression Tab Components and Description

Fields & Settings	Description
1. Tab Title	Displays the Course Progression Tab Title.
2. Title	Displays the title of each of the Online Contents that have been added. Each Online Content is shown as it has been organized by the administrator.
3. Content Type	Displays the type of content that has been added.
4. Force Sequential Completion of Content	This column allows the administrator to indicate whether the user must complete the Online Contents within the folder in a sequential order. Administrator can select the checkbox from Root which auto selects the checkboxes for any Folders within the content structure.
5. Enable Assessment Review	This column is shown when one or more Online Contents are an Assessment and allows the administrator to indicate if a user can review the assessment after completion.
6. Exam Duration	This textbox is for the administrator to indicate the amount of time a user has to complete the exam.
7. OK, Cancel	The administrator either confirms or discards the fields and settings made.

## Completion Tab from Online Content Settings Dialogue

On this tab the administrator defines the completion behavior of the Online Contents.

Online Content Settings

LAUNCH COURSE PROGRESSION **COMPLETION** OBJECTIVES

Record Learning Event When All Content is Complete:  ON

Completion Status:

Allow the User to Review the Content from Completed Work:  ON

AICC Max Normal:

Title	Content Type	Object Complete on Launch	Object Mastery Score	Course Complete When Passed	Course Complete When Failed
▼ Situational Leadership	Root				
▼ Week 1	Folder				
Foundations of Everyday Leadership	SCORM 1.2	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Designing the Organization	AICC		<input type="text" value="0 - 100"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Test Your Knowledge	Quiz			<input checked="" type="checkbox"/>	<input type="checkbox"/>
▼ Week 2	Folder				
Managing the Organization	SCORM 2004	<input type="checkbox"/>	<input type="text" value="0 - 100"/>	<input type="checkbox"/>	<input type="checkbox"/>
Design to Execution	Browser	<input checked="" type="checkbox"/>			
Test Your Knowledge	Exam			<input checked="" type="checkbox"/>	<input type="checkbox"/>

\*Failure status:

\*Failure action:

\*Attempts User Can Fail Before the Action:

OK Cancel

Figure 2.4– Online Content Settings Completion Tab

### Completion Tab Components and Description

Fields & Settings	Description
1. Tab Title	Displays the Completion Tab Title.
2. Record Learning Event When All Content is Complete	This slider when switched on, automatically marks the Item complete (and adds to the user's Learning History) after the user completes all the objects that make up the Item's content structure.



Fields & Settings	Description
3. Completion Status	Drop-down is shown to select the completion status the user receives upon completing the Item.
4. Allow the User to Review the Content from Completed Work	Switcher indicates whether the user can review the Online Contents from their Completed Works page.
5. AICC Max Normal	This textbox represents the maximum number of content objects that a user can access without completing it and receive credit for it.
6. Title Header	Displays the title of each of the Online Contents that have been added. Each Online Content is shown as it has been organized by the administrator.
7. Content Type	Displays the type of content that has been added.
8. Object Complete on Launch	This column presents the option for content completion to take place when the user launches the online object. This is only applicable for SCORM, document, and browser.
9. Object Mastery Score	The content object mastery score is the score required by the user to complete the selected content object.
10. Course Complete When Passed	This column presents the option for course completion to take place when the user passes the AICC, SCORM, Exam, Quiz, and Exam Object (PQE) content types.
11. Course Complete When Failed	This column presents the action to take place when the user fails the AICC, SCORM, Exam, Quiz, and Exam Object (PQE) content types.
12. Failure Status	Drop-down is shown to select the failure status the user receives upon failing the item. This field is only displayed if at least one Online Content is marked "Course Complete When Failed".
13. Failure Action	Set a failure action to control what happens when a user fails the online portion of the learning item.
14. Attempts User Can Fail Before the Action	The administrator can specify the number of times the user can attempt the content prior to obtaining a failure status.
15. OK, Cancel	The administrator either confirms or resets the fields and settings made.

## Objectives Tab from Online Content Settings Dialogue

On this tab the objectives that are associated to the content objects will be available as read-only.

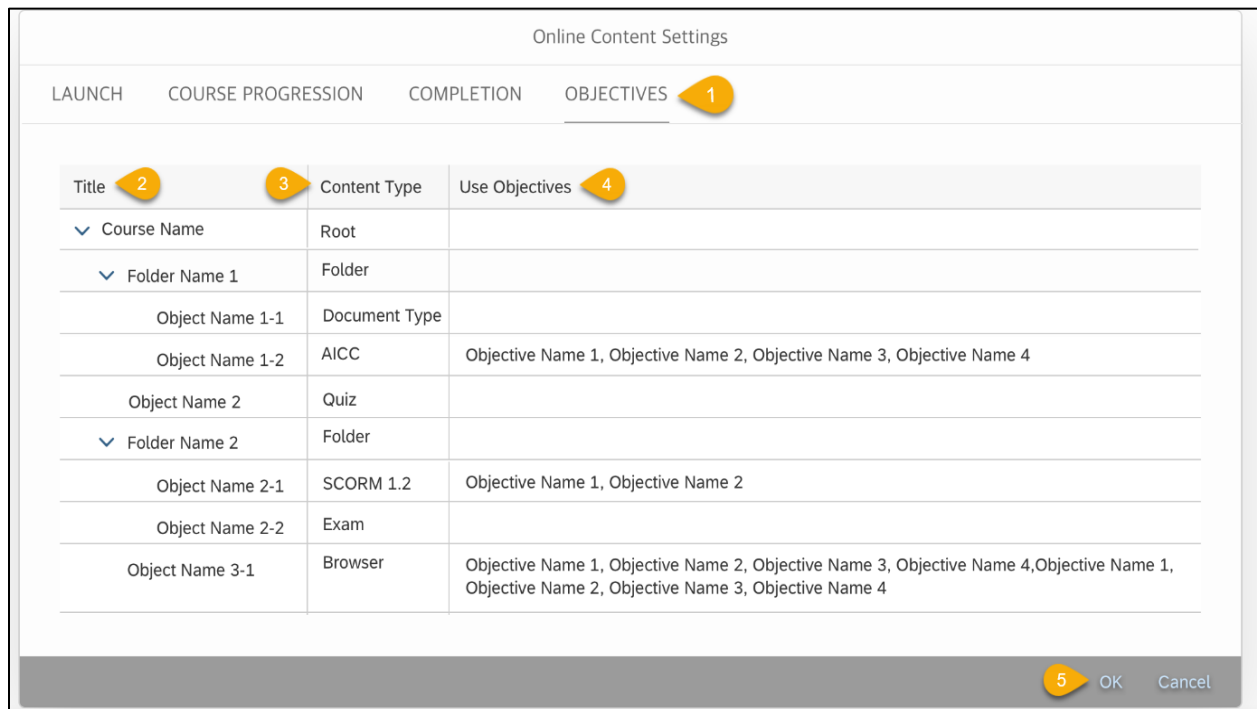


Figure 2.5 – Objectives Tab

### Objectives Tab Components and Description

Fields & Settings	Description
1. Tab Title	Displays the Objectives Tab Title.
2. Title	Displays the title of each of the Online Contents that have been added. Each Online Content is shown as it has been organized by the administrator.
3. Content Type	Displays the type of content that has been added.
4. Use Objectives	This column displays the objectives associated with content objects (except for Folder, Content Package).
5. OK, Cancel	The administrator either confirms or discards the fields and settings made.

### Updates to the Online Content Tab

When one or more users have completed an Item that has online contents associated with it, the system will not allow an administrator to Add, Remove, or Move the Online Contents, because this is ultimately changing the content structure which warrants creating a new revision. The administrator will have to revise the Item if these modifications are needed. This system behavior is only taking place on the new Learning Administrator interface. A message will display at the top of the Online Content tab communicating to the administrator that if updates are needed then revision of the Item is required.

The following functions will not be available, once the Item has been completed by at least one user:

- Add Content Types
- Remove Content Types
- Move the Content Types to be displayed in a different order

The following functions will remain available:

- The Online Content Settings function remains available and the administrator can make updates to the Launch, Course Progression, Completion, Objectives Tabs
- If a Folder content type is part of the content structure, only the Folder Name can be edited
- For any Content Objects, only the Content Object Name can be edited
- For any Content Object, the navigate to the Content Object function remains available

The following functions remain unchanged in the application:

- Updates to a Content Object can still be completed from the Content Object itself
- Deleting User's Learning History while testing Content is still available

## 7C. Classes Entity (Scheduled Offerings)

The Classes (Scheduled Offerings) entity has been improved to provide a greater work area for tasks such as managing the user registration, creation of reserved seats (Slots), and the advanced registration functions. Each of these tasks will have its respective related tab, giving the administrator a more focused view. Additionally, the various email notifications relevant to a class (scheduled offering), have been organized to be rendered from one location for simplicity.

### Class Entity Feature Location Changes

Overall, the Class (Scheduled Offering) entity functionality has not changed. Some functions will be a related tab or have been moved to a more appropriate area.

- The Advanced button and dialogue – will be a related entity tab
- The Settings button and dialogue – The email notification settings displayed from this dialogue has moved to the Class's Details Tab, as part of the form and setup of a Class (Scheduled Offering). Also, the *remove from learning plan* field has been moved to the registration grouping on the summary tab.
- The Reserve Seats (Slots) function – will be a related entity tab

Below, are the images of the Class entity from both, the current administration and new administration user interfaces.

## Classes (Scheduled Offering)

### Current

**Managers - Leadership Development Training**
11404
Actions [View All](#)

Item: 118 ITEM Type 11802 SCH&OL (Rev ...)	Approval Process: First Level Supervisor (SUPV)
Approval Required: Yes	*Domain: Default Public Access Domain (PUE)
End Time: 1200	End Date: 9/30/2019
Withdraw Approval Process: First Level Supervisor (SUPV)	Withdraw Approval Required: Yes
Facility: San Francisco Office (SF)	Instructor: Anusha TG

[View All](#)

Related [More](#)
Registration
Add Users: 
Settings
Advanced

Catalogs

Segments

Registration

Non-enrolled Waitlisted (0)

Enrolled (0) Total (No Limit) Slots (0) Open Slots (0)

Filter  Sort By: Registration I Filter for Enrolled User

### New

**Managers - Leadership Development Training**
Actions

11404

Start Date: 9/30/2019 0100      Instructor: No Name      Enrolled: 6      Active

End Date: 9/30/2019 1200      Location:      Waitlist: 1

Time Zone: Eastern Standard Time (America/New York)      Facility: San Francisco Office (SF)

Item: 118 ITEM Type 11802 SCH&OL (Rev 1 - 6/30/2016 0836)

Summary
Registrations
Catalogs
Segments
Advanced
Slots
Contacts
Government Reporting
Materials
Notifications
Cost Calculation
Cost Summary
Pricing
Chargeback
Registration Form
Documents

All times are shown in your preferred time zone.

\*Scheduled Offering Time Zone: Eastern Standard Tim...      Use Time Zone of this scheduled offering:  Yes  No

Overview

Description:  3950 characters remaining

Email:

Instructor:

Registration Cut-off Date:

Contact:  40 characters remaining

Phone:

Location:

Registration Cut-off Time:

Fax:

Facility:  +

Registration Cut-off Time Zone: Eastern Standard Tim...

Save
Cancel

## The Class (Scheduled Offering) Entity Header

The class (Scheduled Offering) entity header has information that has been surfaced to the top for the administrator to promptly gather a class's details. It will display the class's title (Derived from the Item's Title), class ID (scheduled Offering ID), display time zone (Scheduled Offering's time zone or the time zone in the administrator preferred time zone based on the preferences settings and the Class field "Use time zone of this scheduled offering"), along with the scheduled date & time, the primary instructor, primary location, key registration count, and the class's status (Scheduled Offering status). Most of the actions from the Actions drop-down menu will continue to navigate the administrator to the existing pages as these are not impacted by the Flash replacement. Below is an image of the class (Scheduled Offering) entity header.

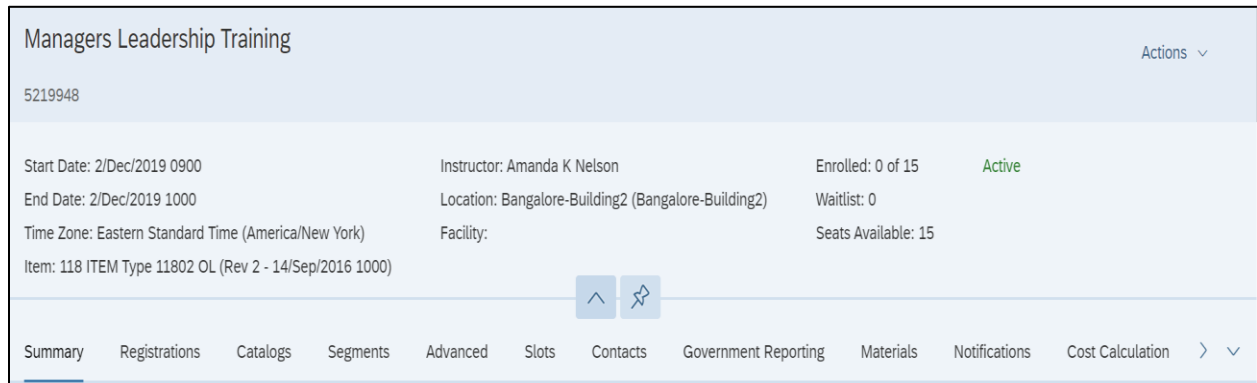


Figure 2.6 – Class Entity Header (Scheduled Offering)

## The Class (Scheduled Offering) Details Tab

The Class (Scheduled Offering) entity's default tab is the Details tab, which is currently accessed from the View All action and titled Additional Settings. On the new administration UI this will be the first tab and presented in a form layout. It has been organized into specific groupings relevant to the class information. At the top of the form, there is a new message, that has been added to provide greater clarity in terms of the time zone that is used to display the date and times. Additionally, the time zone of the Class is displayed as a reference. The administrator has the option to view dates in the Class time zone as long as "Always display Scheduled Offerings in this time zone" in their preferences is not checked. Below is an image of the current and new Details tab (Summary Tab).

## Classes (Scheduled Offering) Details

### Current – View All Form

**Additional Settings**

**Title:**  
**Managers: Leadership Training**

**Description:**  
 Managers Training. This training is mandatory for all managers once a year. It covers company policies, and other important regulations to review.

**Summary**

Maximum Registration:	4	Email:	
Item:	INSTLED KIMNSTRUCTORLED (Rev 1 - 4/Jul/2019 1508)	Approval Process:	Default Public Access Domain (PUBLIC)
Approval Required:	No	*Domain:	First Level Supervisor (SUPV)
End Time:	1700	Withdraw Approval Process:	London Office (LON)
Withdraw Approval Required:	No	*Facility:	16/Jul/2019
Instructor:	Instructor 1.0	*Start Date:	Eastern Standard Time (America/New York)
Start Time:	0900	*Time Zone:	
Registration Status:	6 of 4 enrolled, 1 waitlisted		

**Extended Summary**

Active:	Yes	Contact:	
Enable Cancellation Reason:	Yes	Certificate Template:	
Column 10:		Column 20:	
Column 30:		Column 40:	
Column 50:		Column 99:	
PRI_CUSTOM_COLUMN_REF:	11825_custom_col11:	PRI_CUSTOM_COLUMN:	11825_custom_col12:
	171017:		11825_ClassCF1:
			181017:

**Physical Schedule**

Use Time Zone of this scheduled offering:	Yes	Location:	London Classroom 01
---	-----	-----------	---------------------

**Registration**

Email confirmation to the Instructor:	Yes	Email confirmation to the Supervisor:	Yes
Email confirmation to the User:	Yes	Email confirmation to the Contacts:	Yes
Enable Users to Waitlist:	Yes	Minimum Registration:	
Registration Cut-off Date:	dMMMyyyy	Registration Cut-off Time:	
Registration Cut-off Time Zone:		Published Price:	0.00 US Dollar (USD) (Default)
Self Registration:	Yes	Supervisor Registration:	Yes
Withdraw Cut-off Date:	dMMMyyyy	Withdraw Cut-off Time:	
Withdraw Cut-off Time Zone:			

**VL5 Settings**

Automatically record learning events after schedule...:	No	For Credit Completion Status:	
Minimum Attendance Percentage for Credit:		Non-Credit Completion Status:	

Save Cancel

### New – Class Summary Tab

Cybersecurity - Information Security Principals

11407

Start Date: 9/23/2019 01:00 AM    Instructor: Tracy Friedman    Enrolled: 0    Active  
 End Date: 9/23/2019 01:30 AM    Location:    Waitlist: 0  
 Time Zone: Eastern Standard Time (America/New York)    Facility:  
 Item: COURSE CCB-100 (Rev 1 - 6/18/2019 02:10 PM)

Summary   Registrations   Catalogs   Segments   Advanced   Slots   Contacts   Government Reporting   Materials   Notificatio >

All times are shown in your preferred time zone.

\*Scheduled Offering Time Zone    Use Time Zone of this scheduled offering

Eastern Standard Tim...     Yes     No

**Overview**

Description: This course is mandatory for IT team.    Contact:    3962 characters remaining    40 characters remaining

Email:    Phone:    Fax:   

Instructor: Tracy Friedman    Location: -    Facility:    +

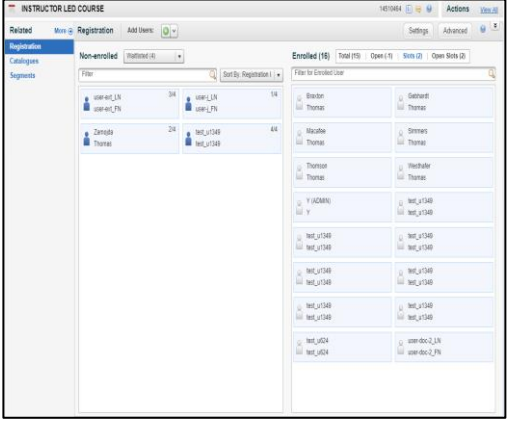
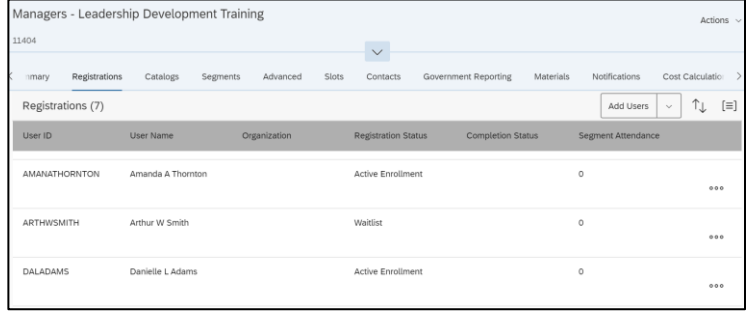
Registration Cut-off Date:    Registration Cut-off Time:    Registration Cut-off Time Zone: Eastern Standard Tim...

Save Cancel

## The Registration Tab and Its Functions

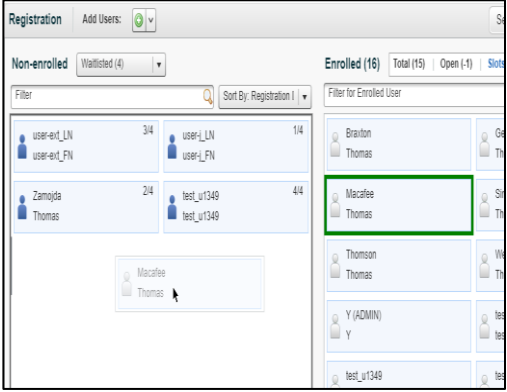
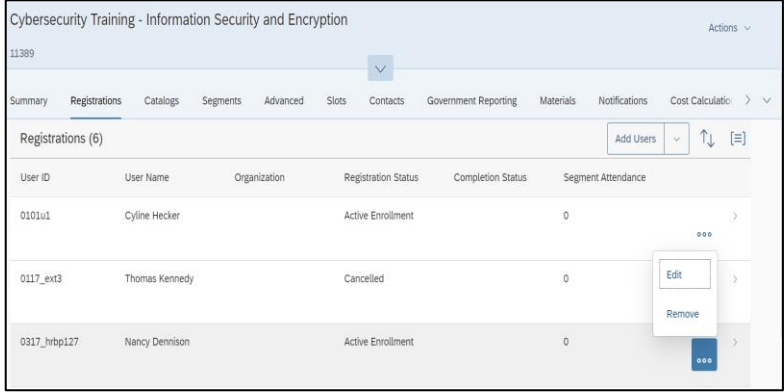
The registration tab displays all registered users for the class (scheduled offering) and has been redesigned to provide a focused area for managing user registration along with the actions easily found on the page. Below are side-by-side images of the registration functions on both the current registration tab and the new administrator user interface tab.

### The Registration Tab

Current	New
	

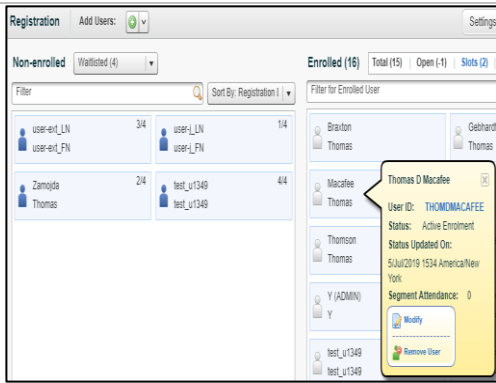
The Registrations tab displays all registered users including registration, completion status and segment attendance, all from one table view. The Group feature allows the Administrator to group registered users based on their Registration status, Organization, or Completion status.

### Changing a User's Registration Status

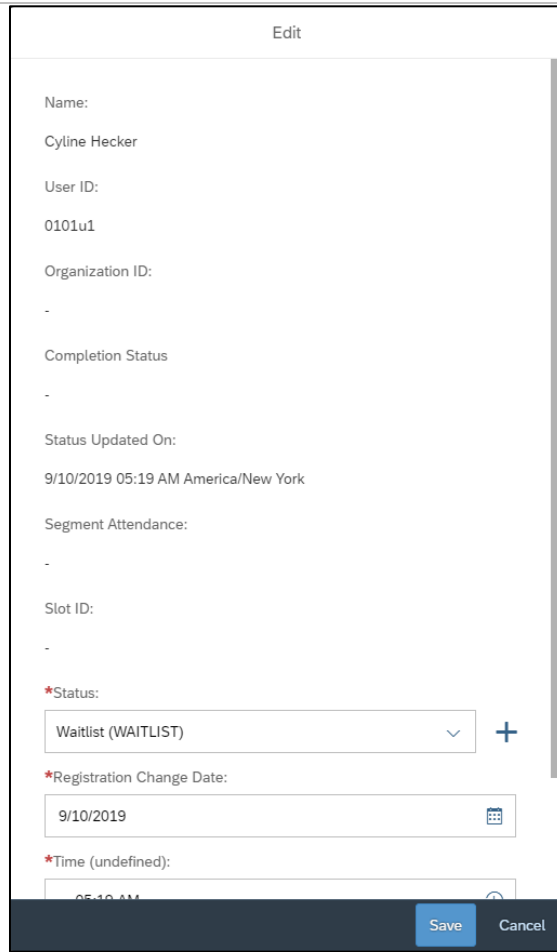
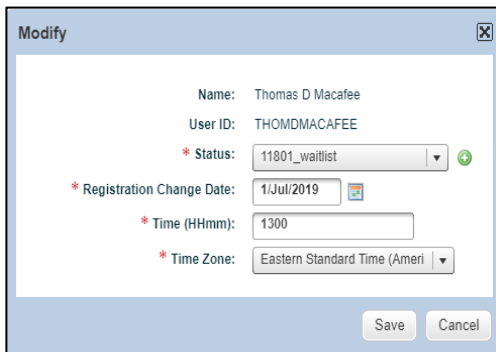
Current	New
	

The administrator has a drag & drop or hover over the User option.

Select the Overflow menu, represented by three dots (...) shown from an individual user's row. Options to edit the user's registration status or to remove the user are displayed. Upon selecting the Edit option, the user's registration status or position in the waitlist can be updated from a dialogue which displays registration information.



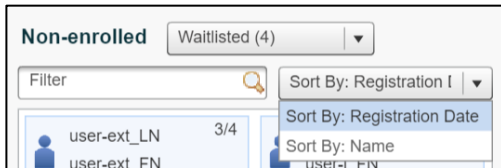
On hovering over, the Modify option is available.



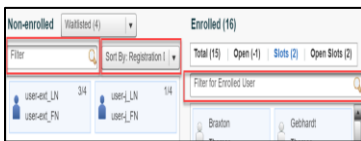
If the administrator withdraws the user, they can enter a cancellation reason if enabled.

### Sorting & Grouping Based on User's Registration Status

#### Current

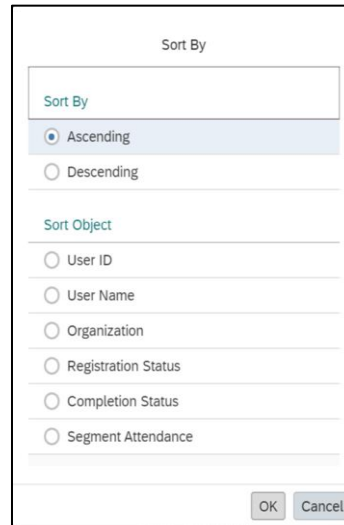


Sorting is done based on the non-enrolled users only.



Filtering is done on two separate panes for non-enrolled and enrolled users.

#### New





Sorting functionality is available across all the columns within the registration table.

Filtering is replaced by the Grouping function.

### Settings and Advanced Functions

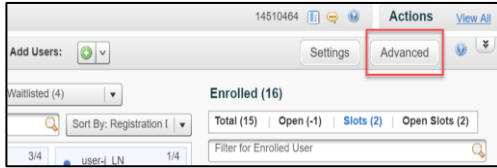
#### Current

Email notifications for specific users is defined from the Settings button.

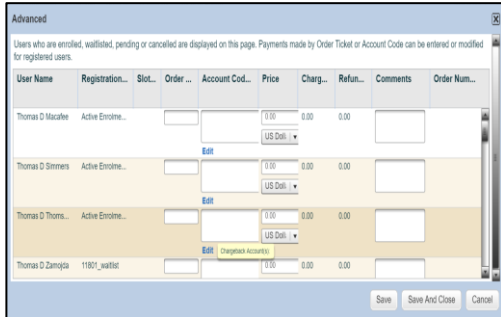
#### New

The administrator can set the Email setting notifications, as well as the “On User Removal” setting, from the Details tab (Summary Tab).

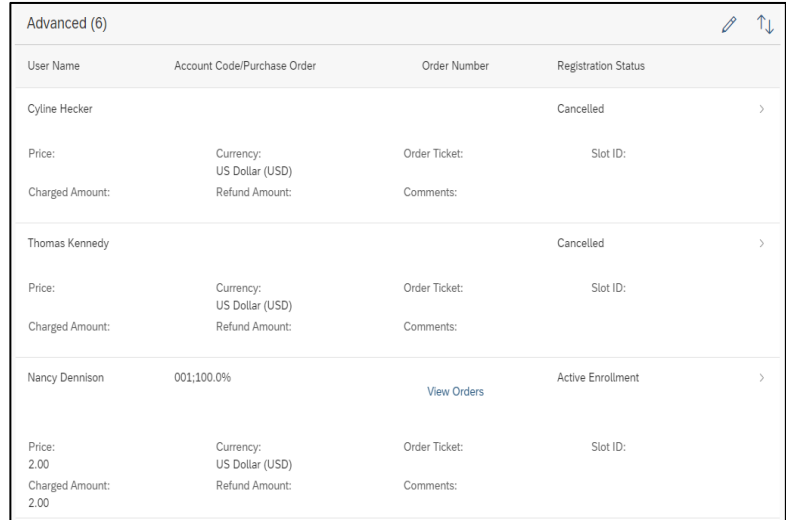
## Current



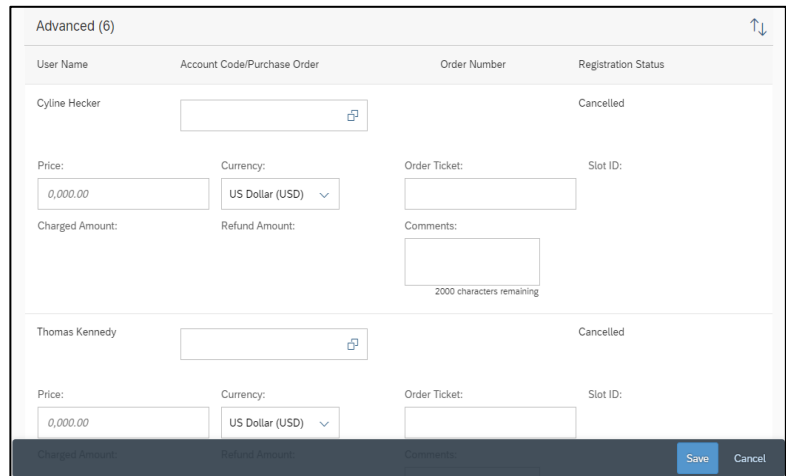
Finance Tasks are available from the Advanced button.



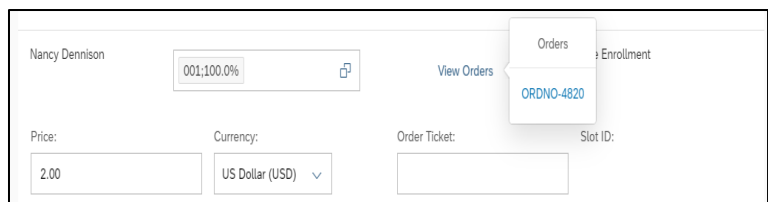
## New



Advanced functions have a respective related tab. The edit mode is displayed on selecting the 'Pencil icon'.

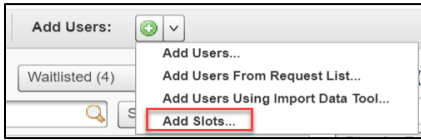


View Orders is available, and upon selecting the Order Number link, the current Order Management dialogue is displayed.

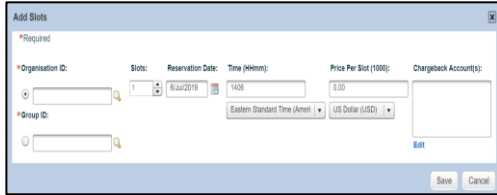


## Adding Reserve Seats (Slots)

### Current



Adding Reserved Seats (Slots) is done from the Add Users drop-down.



### New

Slots (1)							
Group ID	Organization ID	Slot ID	Chargeback Account	Slots Reserved	Slots Used	Price Per Slot	Currency
	1	842		1	0		
Order Ticket:		Reserve Date:		Time:		Time Zone:	
		9/18/2019		01:56 AM		America/New_York	
Comments:							

Adding and management of Reserved Seats (Slots) is done from its respective tab. Upon selecting the Add icon, The Add Slots dialogue is available.

Add Slots

Reserved for:  Organization  Group

\*Organization:

\*Group:

\*Slots Reserved:

\*Reserve Date:

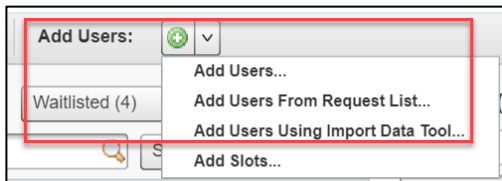
\*Time:

\*Price Per Slot:

Chargeback Account(s):

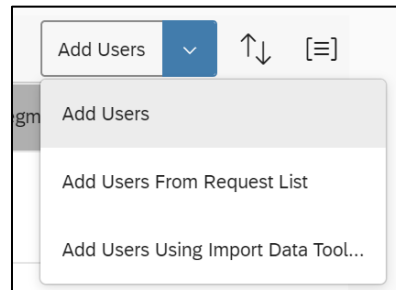
## Adding Users

### Current



Adding Users to a Class via different methods is available from a drop-down.

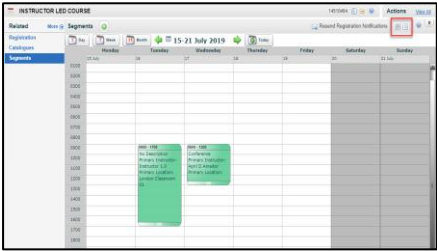
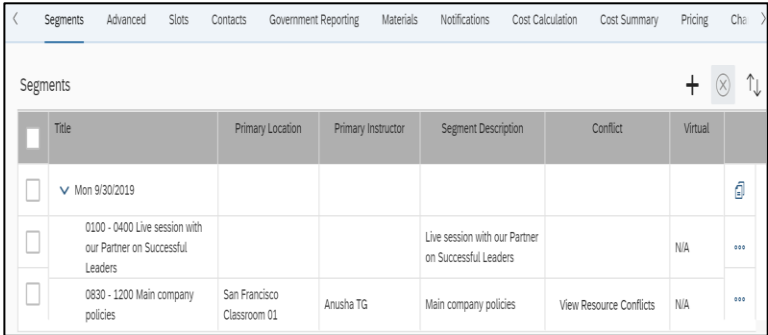
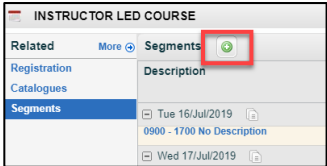
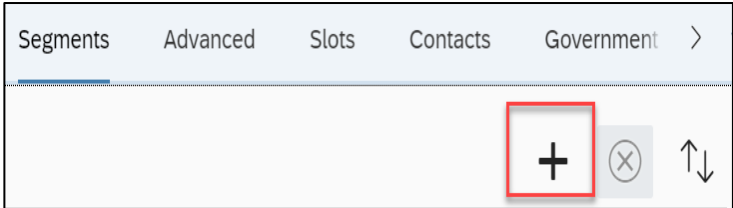
### New



Adding Users to the Class remains available from a drop-down. These options navigate to the current administrator user interface pages.

## The Time Slots (Segments) Tab

The Time Slots (Segments) tab is presented in a table format along with the Table Toolbar which renders the add, remove or copy a Segment functions. Record Attendance and editing a Time Slot (Segment) is also available from the overflow menu represented via three dots shown from the Time Slot's (Segment) row. Below are side-by-side images of the Time Slots (Segments) and its functions from both the current and new administrator interface.

Segments Table	
Current	New
 <p>Segments are presented in a Calendar View or a List View.</p>	 <p>Time Slots (Segments) are presented in a List View format, similar to the current List View but with additional columns for the segment title and for conflicts identified while adding a resource to the segment. (Calendar option is no longer available).</p>
Add a Time Slot (Segment)	
Current	New
 <p>On selecting the plus icon, the Add Segment dialogue.</p>	

**Note:** The Add a Time Slot (Segment) function is available from the Table Toolbar.

**Virtual Setting for a Time Slot (Segment)**

**Current**

The administrator must select the *Segment is virtual* checkbox to view the required fields to set up a virtual segment.

**New**

The Virtual slider, upon selection displays the fields needed to set up a Virtual Time Slot (Segment).

## Adding Resources and Applying them to All Time Slots (Segments)

### Current

**Add Segment**

\*Required

\*Start Date: 18/Jul/2019 \*Start Time: 0900

\*End Date: 18/Jul/2019 \*End Time: 1600

\*Time Zone: Eastern Standard Time (America/New York)

Description: Q&A and Prep Session

Resources

- Add Location
- Add Instructor
- Add Equipment
- Add Custom Resource

*No Records*

The administrator can add the resources needed for the Segment and have all or some resources assigned to all the other Segments associated to the class.

Description: Q&A and Prep Session

Resources

**Apply to All...**

Type & Title	Primary	Remove
Location		
London Classroom 01	<input type="checkbox"/>	<input type="checkbox"/>
Instructor		
Chapin, Adele K	<input type="checkbox"/>	<input type="checkbox"/>
Equipment		
11825_laptop1	<input type="checkbox"/>	<input type="checkbox"/>
Custom		
Parking	<input type="checkbox"/>	<input type="checkbox"/>

**Apply to All Segments**

Select the resource types to apply to all segments.

Apply all

Locations  Equipment

Instructors  Custom Resou...

Note: This action will overwrite all resources assigned to other segments.

Save And Close Cancel

### New

Resources	Suggested Resource Types	Add Instru...	App
Type and Title		Add Location	
EQUIPMENT		Add Instructor	
VIDCONF - Video Conferencing		Add Equipment	
INSTRUCTOR		Add Custom Resource	

Adding resources to a Time Slot (Segment) is available from a drop-down menu. Adding each resource navigates to current administrator user interface search pages.

Resources	Add Instru...	Apply to All Segments
Type and Title		Primary Delete
INSTRUCTOR		
Beverly, Amanda D		<input checked="" type="radio"/> <input type="checkbox"/>

Similar to the current user interface, the resources can be assigned to all the time slots (segments).

**Apply to All Segments**

Select the resource types to apply to all segments. (Note: This action will overwrite all resources assigned to other segments.)

Apply all

Locations

Equipment

Instructors

Custom Resources

Copy Cancel

## Edit a Time Slot (Segment)

### Current

Segments	
Description	
Tue 16/Jul/2019	0900 - 1700 No Description
Wed 17/Jul/2019	0900 - 1300 Conference
Thu 18/Jul/2019	0900 - 1600 Q&A session

The Administrator selects the hyperlinked scheduled time & description of the Segment and is presented with the Edit Segment dialogue.

Type & Title	Primary	Remove
Location		
CLASS - London Classroom 01	<input checked="" type="radio"/>	<input type="checkbox"/>
LAB - London Computer Lab	<input type="radio"/>	<input type="checkbox"/>
Instructor		
Amanda K Nelson	<input type="radio"/>	<input type="checkbox"/>
Aubry D Scott	<input type="radio"/>	<input type="checkbox"/>
Instructor 1.0	<input checked="" type="radio"/>	<input type="checkbox"/>

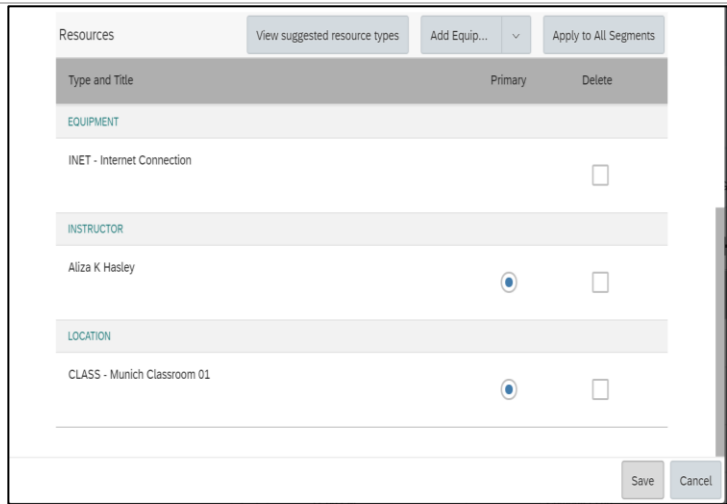
### New

Primary Location	Primary Instructor	Segment Description	Conflict	Virtual
		Live session with our Partner on Successful Leaders		N/A
San Francisco Classroom 01		Main company policies		N/A

The administrator selects the overflow menu, represented by three dots, and selects the Edit Time Slot (Edit Segment) option.

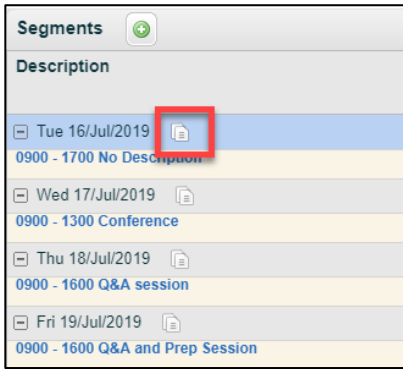
*Description	Live session with our Partner on Successful Leaders				
*Start Date	9/30/2019	*Start Time	0900		
*End Date	9/30/2019	*End Time	0400	*Time Zone	Eastern Standard Time (A...)
<input type="checkbox"/> Allow access to online content during this segment					
Virtual: OFF					

The Edit Time Slot (Edit Segment) dialogue is displayed, allowing the administrator to make any necessary edits. The layout is similar to the current administrator user interface, with the exception that the Virtual slider is positioned above the resources table (On scrolling down on the dialogue the Resources table is displayed as shown in the image below).

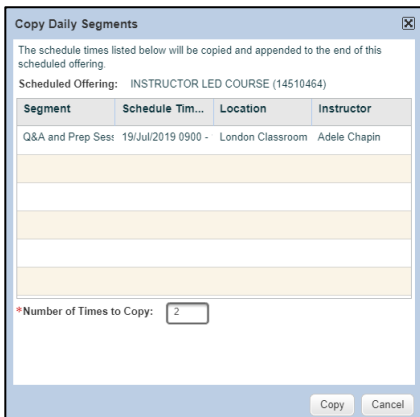


### Copy a Time Slot (Segment)

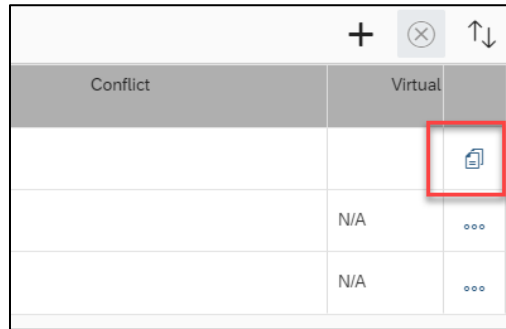
#### Current



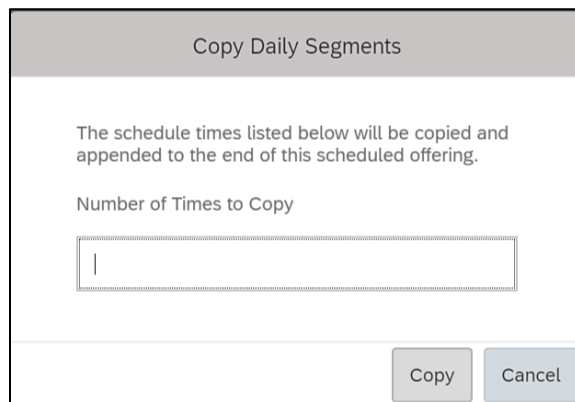
The double document icon on selection presents the option to copy the Segments within the day.



#### New



Similarly, the copy time slot (segment) action is available but from the action column. It's the same icon but from the action column.





## Remove a Time Slot (Segment)

### Current

Primary Location	Primary Instructor	Virtual	Actions	Remove
London Classroom 01	Instructor 1.0		Attendance	<input checked="" type="checkbox"/> Select All
	April D Amador		Attendance	<input checked="" type="checkbox"/>
			Attendance	<input checked="" type="checkbox"/>
London Classroom 01	Adele K Chapin		Attendance	<input checked="" type="checkbox"/>

Remove function is available by selecting the Select All or individual Segments.

### New

Title	Primary Location	Primary Instructor	Segment Description	Conflict	Virtual
Mon 9/30/2019					
0100 - 0400 Live session with our Partner on Successful Leaders			Live session with our Partner on Successful Leaders		N/A

Removing Time Slots (Segments) function is available from the Table Toolbar, which works in conjunction with the checkboxes, allowing to select and remove individual or multiple Time Slots (Segments).

## Record Attendance

### Current

Primary Instructor	Virtual	Actions	Remove
Instructor 1.0		Attendance	<input type="checkbox"/> Select All
April D Amador		Attendance	<input type="checkbox"/>
		Attendance	<input type="checkbox"/>

Recording attendance dialogue is available by selecting the Attendance hyperlink.

### New

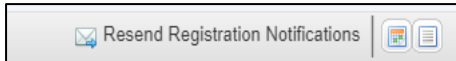
Primary Location	Primary Instructor	Segment Description	Conflict	Virtual
		Live session with our Partner on Successful Leaders		N/A
San Francisco Classroom 01		Main company policies		N/A

The administrator selects the overflow menu and is presented with the option to Record Attendance. Upon selection, the current administrator interface for the Record Attendance dialogue is available.

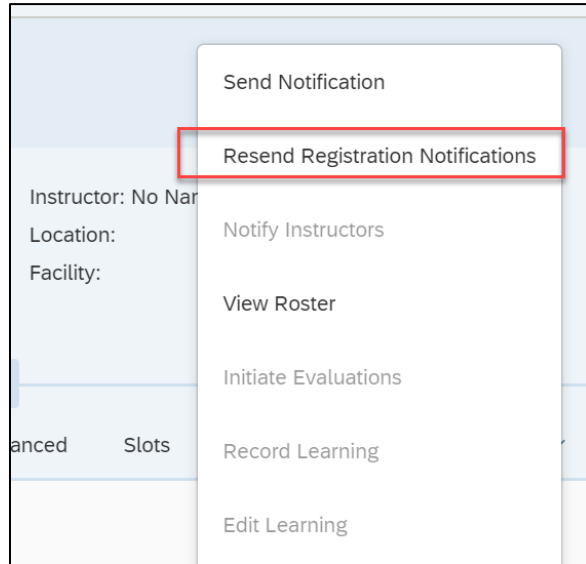
User ID	User Name	Attendance	Comments
THOMBRAXTON	Braxton, Thomas K	<input type="checkbox"/>	
THOMHGEHARDT	Gebhardt, Thomas H	<input type="checkbox"/>	
THOMMACAFEE	Macafee, Thomas D	<input type="checkbox"/>	
THOMDSIMMERS	Simmers, Thomas D	<input type="checkbox"/>	
THOMDTHOMSON	Thomson, Thomas D	<input type="checkbox"/>	
THOMWESTHAFFER	Westhafer, Thomas E	<input type="checkbox"/>	
YI	Y, Y	<input type="checkbox"/>	
test_u6235	test_u1349; test_u1349; test_u1349	<input type="checkbox"/>	
test_u6236	test_u1349; test_u1349; test_u1349	<input type="checkbox"/>	
test_u6237	test_u1349; test_u1349; test_u1349	<input type="checkbox"/>	
test_u6238	test_u1349; test_u1349; test_u1349	<input type="checkbox"/>	
test_u6239	test_u1349; test_u1349; test_u1349	<input type="checkbox"/>	
test_u6240	test_u1349; test_u1349; test_u1349	<input type="checkbox"/>	
test_u6241	test_u1349; test_u1349; test_u1349	<input type="checkbox"/>	
test_u624	test_u624; test_u624; test_u624	<input type="checkbox"/>	
user-dbc-2	user-dbc-2_LN; user-dbc-2_FN	<input type="checkbox"/>	

## Resend Registration Notification

Current



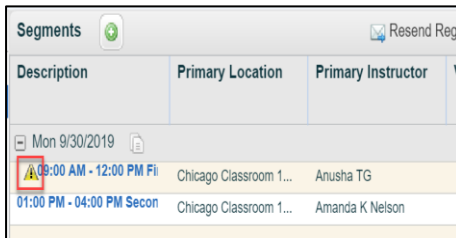
New



This notification will be available from the Class's Header's Action options.

## Conflict Warning Dialogue

Current

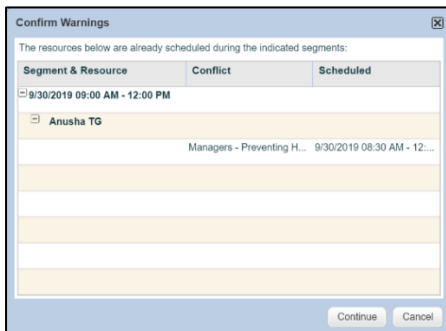


Conflict warning is shown from the Segment in the form of a warning icon.

New

Primary Location	Primary Instructor	Segment Description	Conflict	Virtual
San Francisco Classroom 01	Anusha TG	Main company policies	<a href="#">View Resource Conflicts</a>	N/A

From the Time Slots (Segments) table, a conflict column has been added to notify the administrator of any conflicts. Upon selection the conflict warning dialogue is available.



Resource Conflicts		
The resources below are already scheduled during the indicated segments:		
Resources		
Segment & Resource	Conflict	Scheduled
9/30/2019 0830 - 1200		
Anusha TG		
	Employees - Harassment Prevention in the Wo...	9/30/2019 0900 - 1200

## 7D. User Entity

The user entity's fields, currently available within the additional settings dialogue, have been organized within groups that are relevant to the information these fields provide. Additionally, as the new Learning Administration builds a more fluid integration with the Human Experience Management Platform, the non-native user's personal and employment information will be managed from the Human Experience Management Platform and available as read only within the new Learning Administration application. The following non-native user fields will be managed from Platform:

### Personal Information:

- First Name
- Middle Name (MI)
- Last Name
- Address
- City
- State/Province
- Postal Code
- Country
- External ID
- Email Address

### Employment Information:

- Job Title
- Employee Status
- Location
- Full Time
- Hired Date (Hired)
- Termination Date (Terminated)
- Job Code
- Employment Type

- Regular/Temp

The following user fields will be managed in LMS until support is available in Platform for External Learner:

- Organization
- Manager (Supervisor)

**Note:** A message will display at the top of the User Details Tab (Summary tab) communicating to the administrator that certain fields on the page are read-only because they contain HR data and should be maintained and managed in the core HR system of record.

For users accounts that are managed within the Learning application (The user is a Learning “Native User” and does not authenticate via the Human Experience Management Platform), the user entity fields will continue to be editable and supported. For detailed functional and terminology changes for the User entity, access the Entities Field [Changes spreadsheet by clicking here](#).

## 8. Preparation Checklist

The table below lists configurations and set ups that an administrator can review now in preparation to the new Administrator interface.


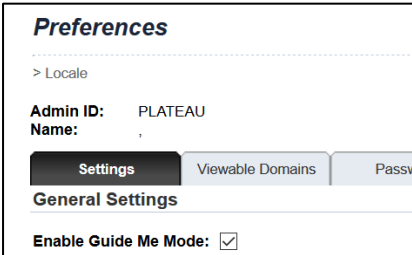
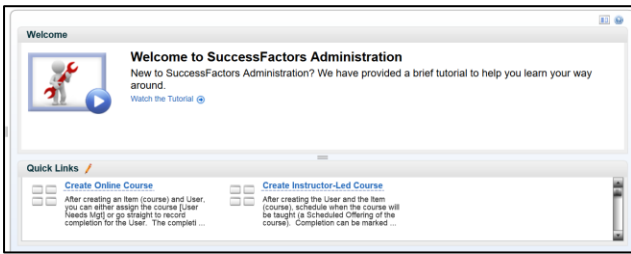
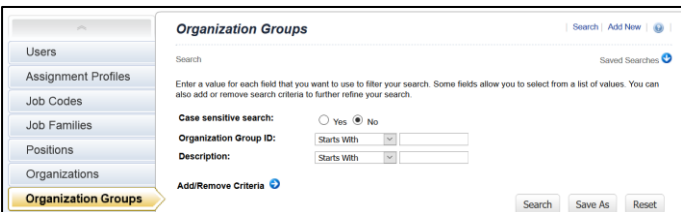
Configuration/Set Up Question	If Yes, Take this Action	Explanation
Is System Administrator> Configuration> System Configuration> LMS_ADMINISTRATOR> emailValidationEnabled set to false?	Ensure all email addresses are properly formatted for the following: <ul style="list-style-type: none"> <li>• User&gt; Email Address Assignment</li> <li>• Profile&gt; Contact Email</li> <li>• Item&gt; Contact’s Email</li> <li>• Scheduled Offering&gt; Email</li> <li>• Catalog&gt; Contact Email</li> <li>• Coupon&gt; Owner Email</li> <li>• Subscription&gt; Owner Email</li> <li>• Purchase Order&gt; Balance Notification Email(s)</li> </ul>	Since email addresses are used by the system to send email notifications, all email addresses on major entities will be validated when saving the entity in the new Learning Administration application. Note that connectors will not be impacted.
Are you using Item> Ratings field?	Enable user to rate items instead of an administrator populating this field.	This field has been deprecated and removed as the functionality is replaced by allowing user ratings. The intent of this field was to allow an administrator to manually tabulate a rating based on learner surveys. Now that learners can rate the item, this field is no longer necessary.
Are any major entity related entity tabs hidden in <i>System</i>	Check the current records configurations, take note of the entity tabs that are not visible and check for	Related Entity tab visibility in the new administrator UI is controlled via workflow versus

Configuration/Set Up Question	If Yes, Take this Action	Explanation
<i>Administrator&gt; Configuration&gt; Record Configuration?</i>	its respective workflows. Remove workflow from administrator role to maintain it being hidden.	record configuration. The tab will always appear if there is not a specific workflow for that tab.
Do you have administrators with view only access?	Be aware that they will now be able to view the value for Approval Process fields without needing the Search Approval Process workflow.	Currently in view or edit mode an administrator cannot see the value for domain, approval process, withdraw approval process unless they have the corresponding search workflow. In the new application, Administrators will be able to view the Domain set on an entity without Search, Edit or View Domain workflow as long as they have the View Item or Edit Item workflow. The value will be read only when the administrator is in either view or edit mode without Search Domain workflow, and the administrator will be able to change the Domain for an entity if they have Search Domain workflow. Note that a workflow is still required to view any custom column labels and values.
Do your administrator roles, that can access reports, exclude the Search Reports workflow?	Add Search Reports for administrators with this role to access the Reports menu.	The Search Reports workflow controls access to reports in the new Learning Administration.
Do you have number fields on an item with values greater than 99,999? (Length, Credit Hours, Contact Hours, CPE Hours, Min Registration, Max Registration, Registration Threshold, Gamification Base Points or Prep Time)	Ensure that field values that exceed 99,999 are reduced to a value of 99,999 or less.	Item 'number' fields will be limited to values 'blank' and 0 through 99,000 (whether decimal or whole numbers), except for the two fields: Initial Number, and Retraining Number, as they have special validation rules based on the associated Basis field selection. This change streamlines the validation messages to the administrator.
Are you using Organization Groups?	Create an Organization Custom Column to manage grouping.	As noted in Section 9. This functionality is being deprecated.

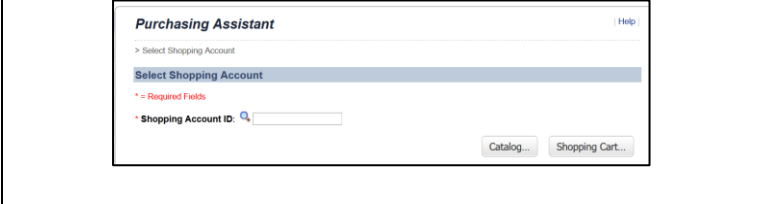
Configuration/Set Up Question	If Yes, Take this Action	Explanation
	Limitation: An organization can only have 1 referenced value for a custom column.	
Are you using User > Position, Picture, Coach, Password, Resume, Prior Months of Service, Prior Years of Service?	Migrate this data to the Human Experience Management Platform.	These fields have been deprecated within Learning as the functionality is replaced by managing users in the Human Experience Management Platform. Please access the User tab within the <i>Entities Field Changes</i> spreadsheet for additional information.
Do you have administrator roles with a workflow that grants access to a related entity tab, for any of the 9 major entities, and that related entity tab is disabled via the <i>System Administrator &gt; Configuration &gt; Module Tab</i> ?	Remove the workflows from the administrator role to prevent administrators from accessing the related entity tab.	The new entity manager displays the related tabs primarily based on workflows and does not honor the Module Tab configurations.
Have you customized the DEFAULT_ADMIN_INTRO via the <i>System Administrator &gt; Application Admin &gt; User Introduction</i> ?	Create a new User introduction and populate the Data field with your customized content. Then select this new panel ID as the default introduction message from the Introduction Panel ID drop-down option in System Administration > Configuration > Global Variables page.	The existing content was intended to be maintained by SuccessFactors only and will be overridden with the release of Learning Administration Application.
Do you have terminology in custom reports (titles, field labels) that you would like to update to match the new taxonomy for Learning?	If text shown on your custom report is using a custom label created by your company, find your label in References > Geography > Labels and edit the label value. If text shown on your custom report is in the report code, update the report code, save and publish.	Updates to terminology may have an impact on reports that use application labels being updated to the new terminology.

## 9. Removed Functionality

Below is a list of all removed functionality. This functionality will not be available from the new Learning Administration user interface and will be removed from the current application on the second half of 2020. The Related configurations and permissions (workflows) associated with these functionalities will also be removed. With the release of the new Learning Administration Application, Customer Support will answer how-to questions but will not fix or patch the legacy application.

Removed Functionality	Information/Notes
<p>Administrator Power Search bar with command and keyword Search</p> 	<p>Power Search Synchronization and Optimization automatic processes are also being removed.</p>
<p>Guide Me Mode and Recommended Next for performing a task</p> 	<p>Related configuration is also being removed.</p>
<p>The out-of-the-box <i>Welcome to SuccessFactors Administration</i> video/tutorial and the Home page quicklinks</p> 	<p>These are aspects of the Flash application interface that are being removed. Recommendation is provided in <a href="#">Section 3</a> of this document.</p>
<p>Configuring fields and tab order of the 9 major entities and corresponding personalized views.</p>	<p>Additionally, these entities will be removed from System Administrator&gt; Configuration&gt; Module Tab. Field and tab order will be set based on best practices which will apply to all administrator users.</p>
<p>Organization Groups</p> 	<p>Customers can create an Organization Custom Field to manage grouping.</p>
<p>External Reports</p>	<p>Lack of use.</p>
<p>Purchasing Assistant</p>	<p>An administrator can purchase on behalf of a learner using proxy mode.</p>

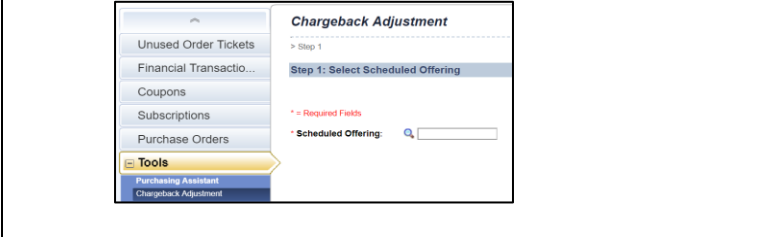
Removed Functionality	Information/Notes
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An administrator can register a learner into a class from the class entity.

Chargeback Adjustment tool within Commerce (functionality is available via other means)

An administrator can adjust a charge via Scheduled Offering> Advanced; Learning Event Editor or Order Management.



Administrator's ability to rate an Item

Enable user to rate items instead of an administrator populating this field.



User entity's Prior months of Service, Prior years of Service, Coach, Position and Resume fields

Customers should use the -Platform for this employee information.



**Note:** Image only shows two fields. Remaining fields are accessible by selecting the View All link.



Removed Functionality	Information/Notes
Organization Dashboard (User side and settings on User record)	Customers can use Work Force Analytics (for a cost), develop a custom report, or wait for new reports through SAC.
Performance main menu Talent Profile Competency Assessment Performance references (Competency Categories, Competency Sources, Competency Types)	These are now managed in Talent.

### Removal of Legacy Plateau Features

The new Learning Administration Application will run concurrently with the legacy application for one release. The legacy version containing Flash components within Learning will be removed from the user and administrator side. This will include the following Legacy Plateau features. For any removed feature the corresponding settings or configuration will also be removed:

- Organization Initiative, Succession Planning, Assessments and Skills Inventory on User entity
- Ability to Add Competency
- Talent Profile
- Job Family
- Positions

Job Family and Positions were part of the Performance Module of Plateau which has been deprecated. Customers should use the Platform Job Profile Builder functionality.

### Accessibility Notes

The “Turn Accessibility On” link in Flash is not necessary in the new Administration interface as the application can be used with standard keyboard shortcuts so no onscreen instructions are required for navigation and removing Flash improves the use of screen readers.

## 10. For More Information

Visit the [Customer Community blog](#) to stay informed on the upcoming release of the new Learning Administration Interface. Share feedback on this guide and post questions in the comments section.