

SkillsServe Platform

Re-Registrations & Reports

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Introduction

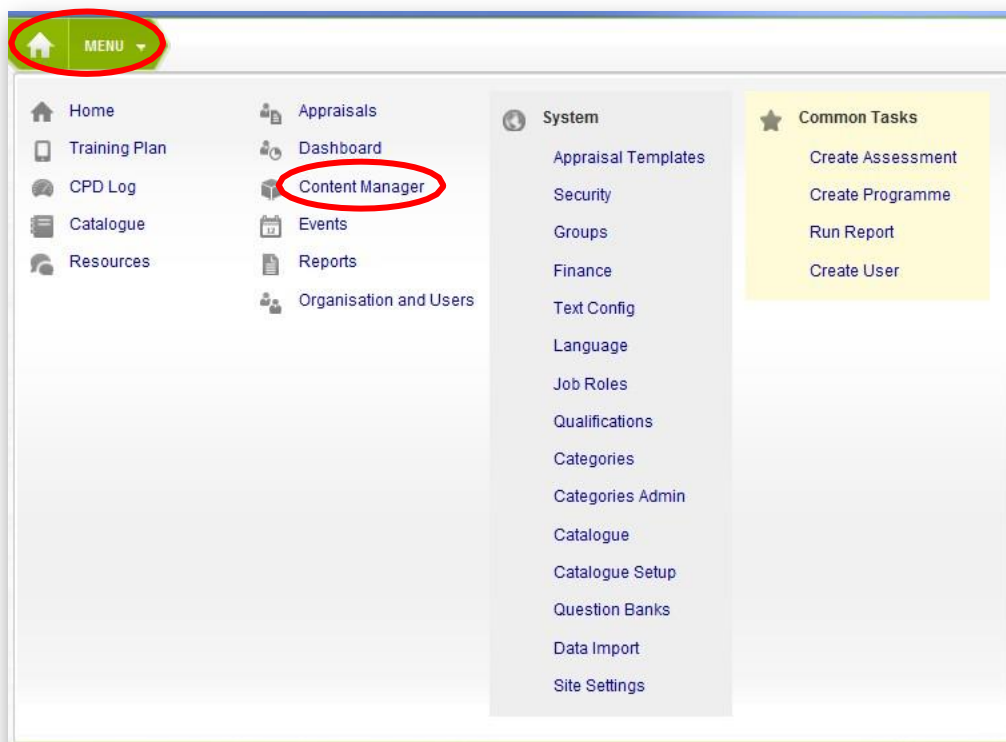
Following the rollout of new versions of courses you may wish to transfer your users onto the updated versions. In this guide we will be taking a look at re-registering existing Users onto new pieces of Content, Re-occurring enrolment rules and editing Reports within the SkillsServe Platform.

In the main, the updates will be minor in nature and will be automatically applied to the courses. When we update in this way you will not need to take any action to update your users learning.

Re-registering existing users

Log on to your site.

Hover your mouse over the Home icon in the top left corner and select

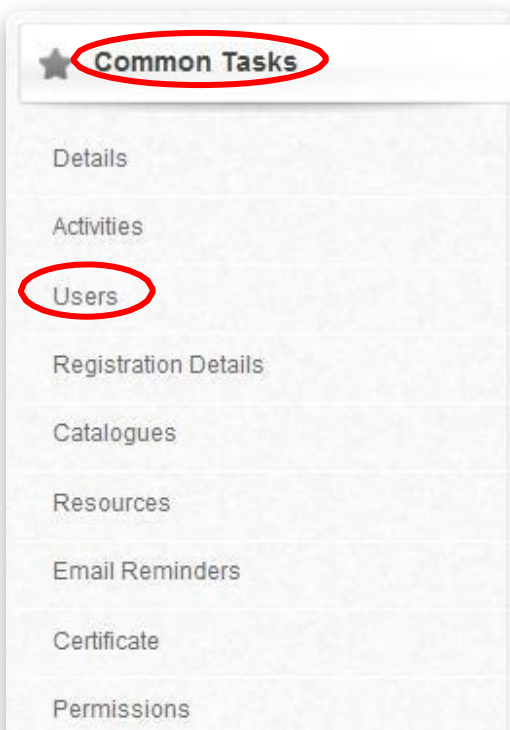


Using the Search facility, search for the new version of the Course. For example, the **Treating Customers Fairly** programme.

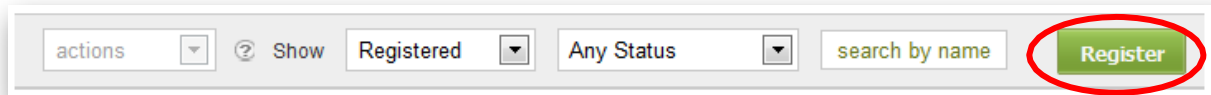
Select the programme that you are looking for.



On the left-hand side of the screen, click on the **Users** section from within the **Common Tasks** section.

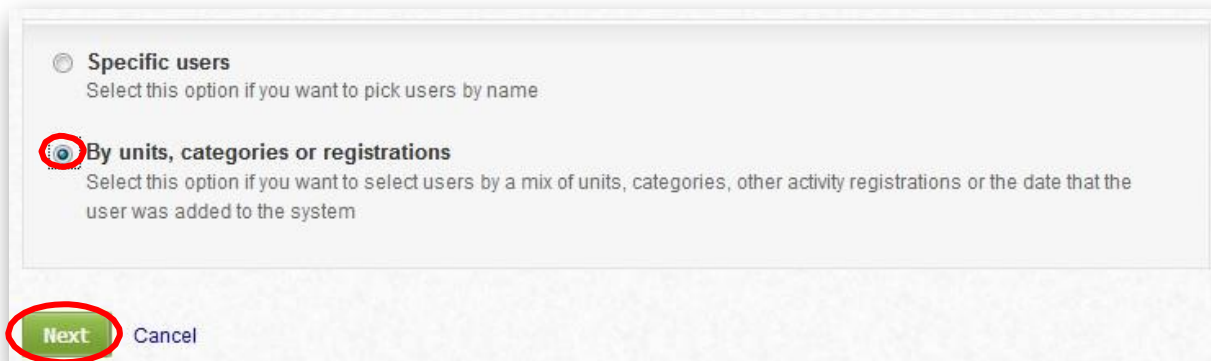


Click on the green **Register** button that appears in the top right-hand side of your screen.



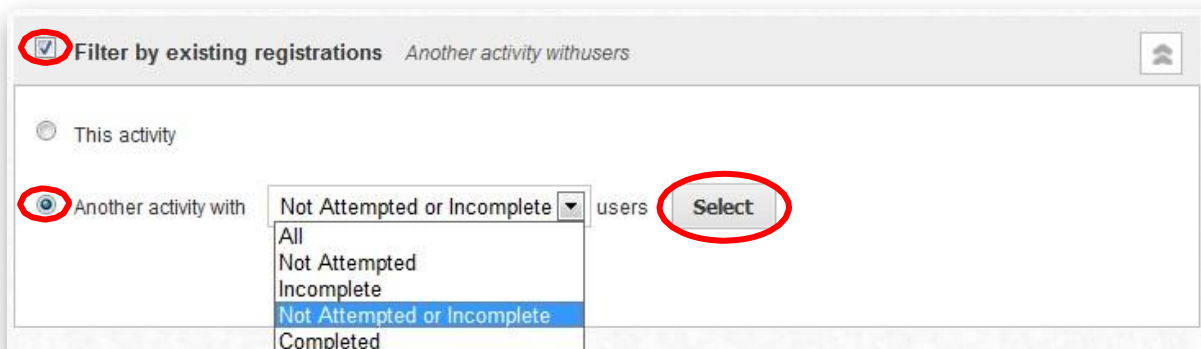
A horizontal navigation bar with several elements: a dropdown menu labeled 'actions', a 'Show' button with a question mark icon, a dropdown menu labeled 'Registered', a dropdown menu labeled 'Any Status', a text input field labeled 'search by name', and a green button labeled 'Register' which is circled in red.

Select **By units, categories or registrations** and click **Next**.



A dialog box with two radio button options. The first option is 'Specific users' with the description 'Select this option if you want to pick users by name'. The second option is 'By units, categories or registrations' with the description 'Select this option if you want to select users by a mix of units, categories, other activity registrations or the date that the user was added to the system'. The second option is selected and circled in red. At the bottom left, there is a green 'Next' button circled in red and a grey 'Cancel' button.

Tick **Filter by existing registrations** and select **Another activity with**. From the drop down menu, select the option that applies, and press **Select**.



A dialog box titled 'Filter by existing registrations' with a subtitle 'Another activity with users'. It has a checked checkbox for 'Filter by existing registrations'. Below this, there are two radio button options: 'This activity' and 'Another activity with'. The 'Another activity with' option is selected and circled in red. To its right is a dropdown menu currently showing 'Not Attempted or Incomplete', with a list of options: 'All', 'Not Attempted', 'Incomplete', 'Not Attempted or Incomplete' (highlighted in blue), and 'Completed'. To the right of the dropdown menu is a grey button labeled 'Select' circled in red.

Clicking **Select** will direct you to the **Content Manager** where you should Search for the old version of the course. Once located, select the Radio button next to the title and press the **Add and Save** button on the right-hand side.

View: All Activities Selected: 1 ? Cancel Add and Save

Filters ? clear all	Activity Name	Start Date	End Date	
Treating Customers Fairly	*FSA: Treating Customers Fairly			Info
▼ Activity types				
Assessment (14)	*FSA: Treating Customers Fairly			Info

You will now be returned to the Registrations page. Click **Next** to continue.

Previous Next Cancel

You will now be presented with the **When to register section**. Select the option that best applies to your organisation.

N.B. You do not need to tick the **Check rule automatically** box as this registration rule should only need to be applied once.

☐ Immediately
☒ Overnight
☐ On
☐ Check rule automatically ? Until Specified Date

If you would like to specify a due date for the new piece of content you can do so by selecting one of the options from the **Due Date** section.

Click **Finish** once you are happy with the setup of the enrolment rule.

Due Date

☒ Set due date

☒ Specify a date

☐ Specify a date from user creation date

☐ Specify a date from last completion

☐ Specify a date from last due date

☐ Keep the planned end dates for existing registrants

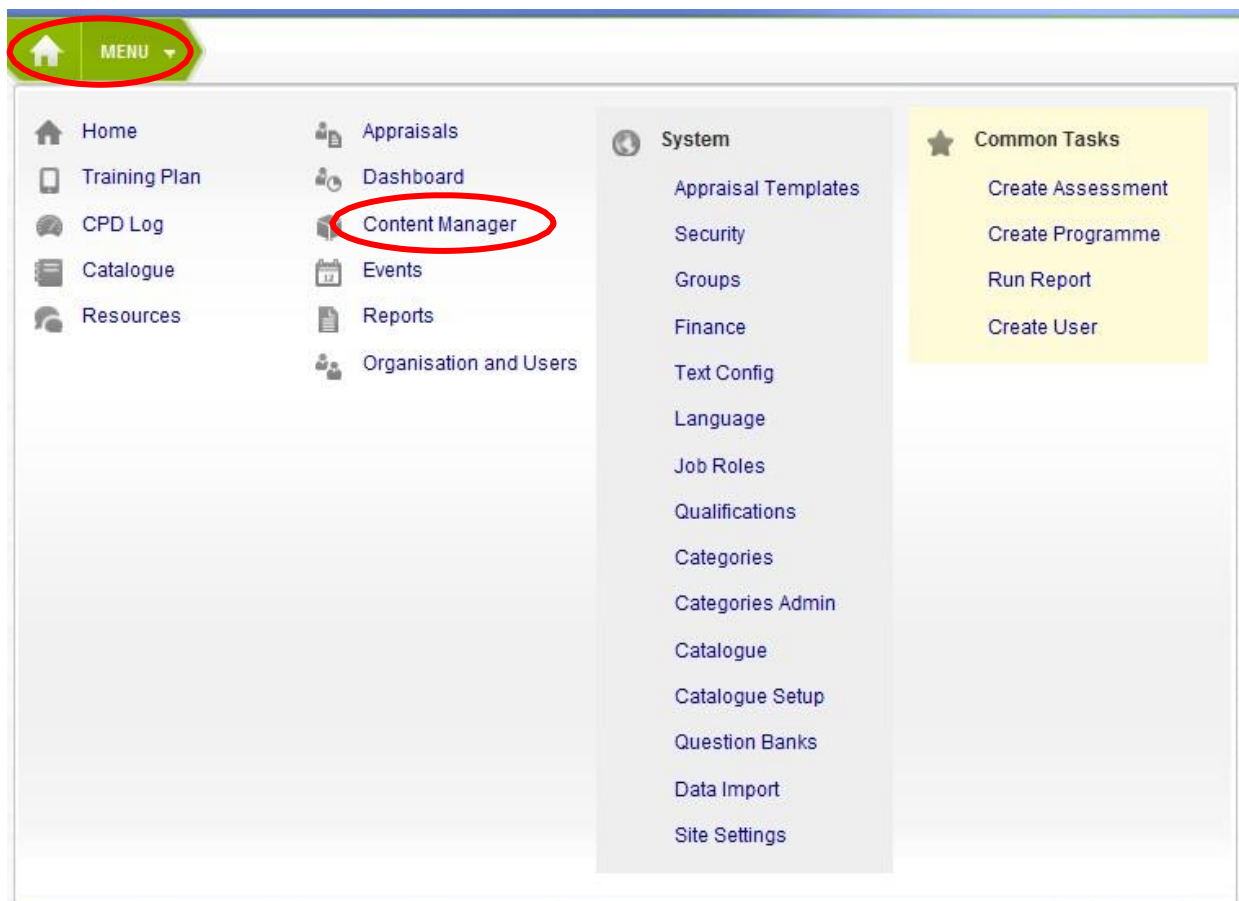
Previous **Finish** Cancel

Mo	Tu	We	Th	Fr	Sa	Su
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Re-occurring enrolment rules

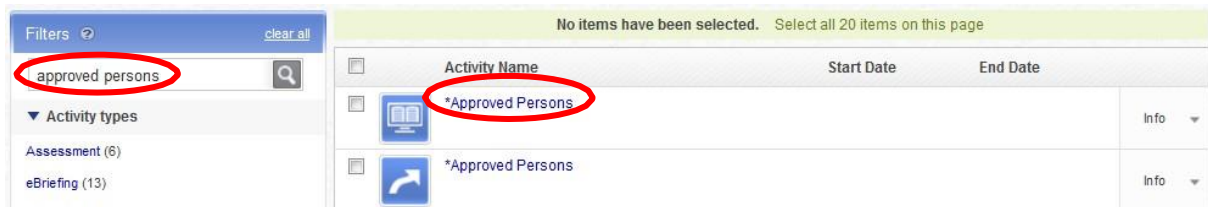
If you would like to create a rule to ensure that staff are automatically added to the Programme as they join your organisation or when they are automatically re-enrolled, you can do so by creating an Enrolment Rule.

Hover your mouse over the **Home** icon in the top left corner and select **Content Manager** from the **Menu**.

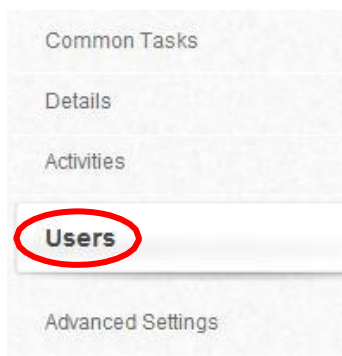


Using the Search facility, search for the new version of the Course. For example, the **Approved Persons** programme.

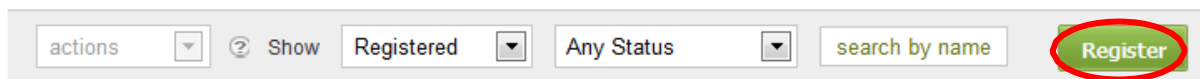
Select the programme that you are looking for.



Within the programme page on the left-hand side of the screen, click on the **Users** section from within the **Common Tasks** section.



Click on the green **Register** button that appears in the top right-hand side of your screen.



Select **By units, categories or registrations** and click **Next**.

☐ **Specific users**
Select this option if you want to pick users by name

☒ **By units, categories or registrations**
Select this option if you want to select users by a mix of units, categories, other activity registrations or the date that the user was added to the system

Next Cancel

Select the **Filter by units** option. You will then see your organisation and the units within it.

Select the units that you want to automatically be enrolled, and click **Next**.

N.B. If you select the top level unit, all units below will automatically be ticked for you. If you choose a sub unit, you will then have to manually select which units you want included yourself. However, if any additional sub units are added after the rule is set up, you will need to create an additional rule to cover the new unit.

Use the options below to determine the criteria for the list of users

☒ **Filter by units** 1 group selected

All Organisations Search Go 1 Selected

☐ Name1
☒ Name9 ☒ Include child units
☐ Name3
☐ Name2
☐ Name4
☐ Name5
☐ Name7
☐ Reviewers
☐ Unicorn User Accounts

Previous **Next** Cancel

On the next page, leave the **When to register** section as **Overnight**, tick the **Check rule automatically** box, and select either a **specified date** or **Indefinitely**. This will then run the rule overnight every night until the date you have specified or indefinitely. Any users not already enrolled will then be enrolled on to the programme.

Use the following options to specify when to register selected users, reset activity progress and set deadline dates to complete this activity.

When to register ?

☐ Immediately

☒ Overnight

☐ From

☒ Check rule automatically ? Indefinitely ▼

☐ Cancel registration when rule no longer applies

If it is a requirement that users complete the course every 12 months you can reset the progress of the course for all users either on a set date or 12 months after the user was first enrolled.

To do this tick the **Existing registrations – Reset progress** box.

You can then choose either to reset the progress for each user 12 months after the user was first enrolled by using the **When the registration is older than** option.

Or every 12 months on a set date by using the next option (all users will then be reset on the same day each year e.g. 1st January).

N.B Do not choose the **Reset Progress; Once completed** option if the rule is to run to a set date or indefinitely. If you do select this option then users will be reset to not started every time they complete the course.

If required you can also set a due date to ensure that all users complete by a certain time – e.g. 31st December.

Again for the due date there are a number of options – the most commonly used are:

- **Specify a date** – all users complete by the same date
- **Specify a date from user creation date** – useful for new starters for example who need to complete courses within set time of

starting employment (e.g. first 3 months of employment)
Then click the **Finish** button and this is the set up.

Existing registrations

☒ Reset progress ?

☐ When the registration is older than 12 Months

☒ Every 12 Months from 01/01/2013

☐ Once completed

Due Date

☒ Set due date

☒ Specify a date 31/12/2012

☐ Specify a date from user creation date 12 Months

☐ Specify a date from last completion 12 Months

☐ Specify a date from last due date 12 Months

☐ Keep the planned end dates for existing registrations

Previous Finish Cancel

Any rules that you have set up can be viewed or removed under the **Users** tab of the programme.

Common Tasks

Details

Activities

Users

Advanced Settings

Catalogues

Resources

Email Reminders

Certificate

Permissions

Add Resource

actions ? Show Registered Any Status search by name Register

This list is empty.

Results: 0 – 0 of 0 Show: 20 per page

« First » Previous 1 Next » Last »

Pending Registration Rules

Run Date	Criteria	Schedule	
30/10/2012 01:00	1 Criteria	Daily	remove

Organisation units

Name9

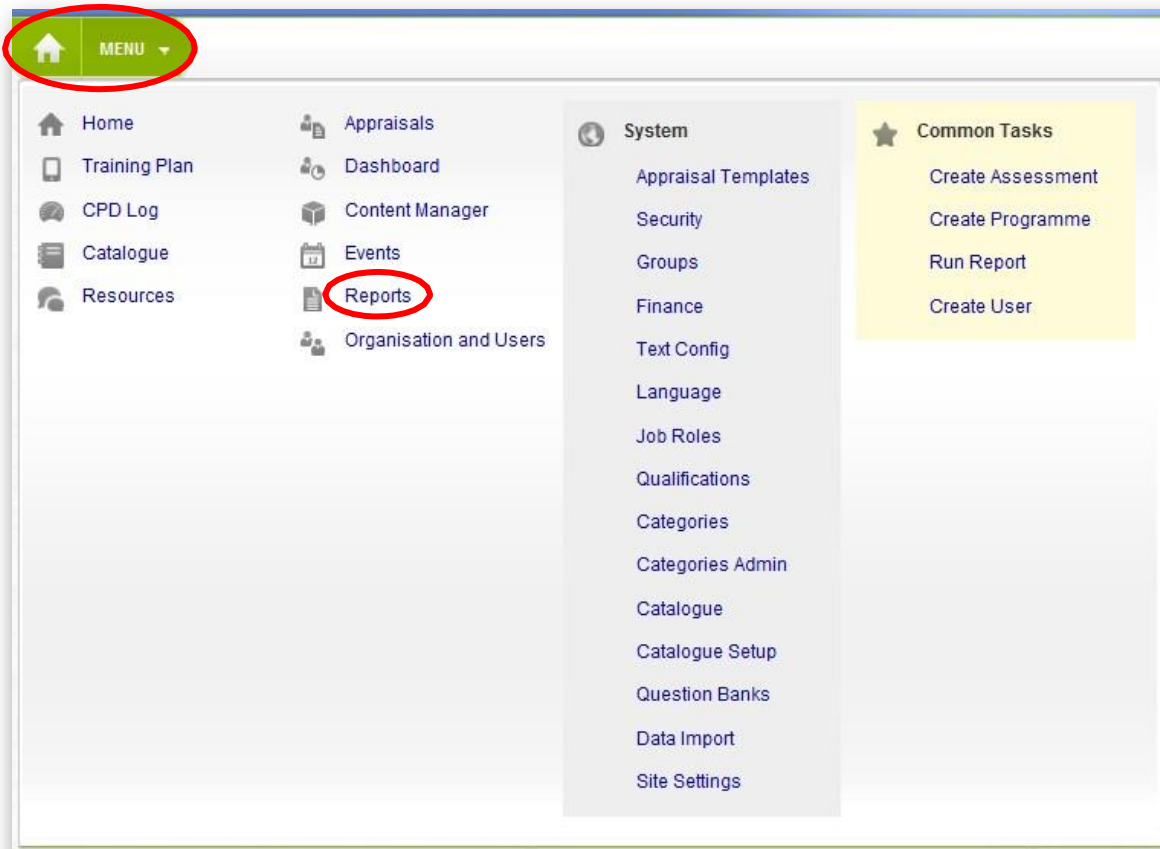
Name3

Results: 1 – 1 of 1 Show: 10 per page

« First » Previous 1 Next » Last »

Reports

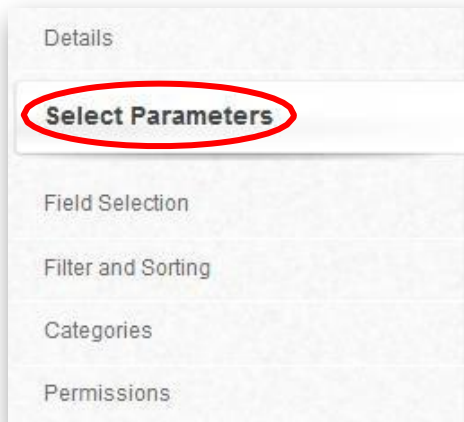
Hover your mouse over the Home icon in the top left corner and select **Reports** from the Menu



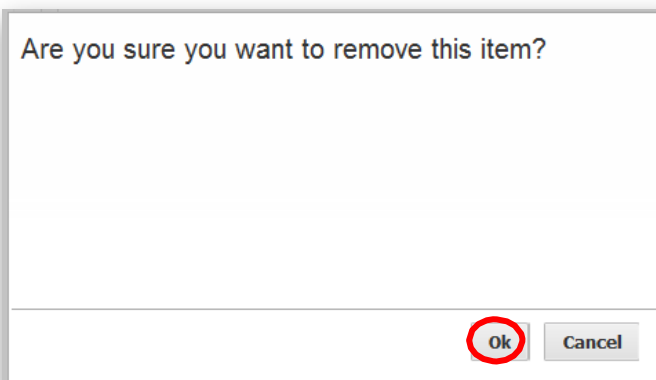
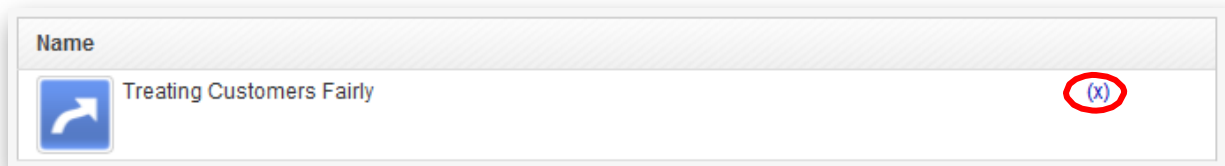
Chose the report that you wish to amend and click **Edit**.

Report Name	Actions		
★ Assessment Status Report	Info ▼	Scheduled Emails ▼	Edit
★ eLearning Status Report	Info ▼	Scheduled Emails ▼	Edit
★ Event Registrations Report	Info ▼	Scheduled Emails ▼	Edit
★ Learning Nexus Tests	Info ▼	Scheduled Emails ▼	Edit
★ Regulatory Essentials Report	Info ▼	Scheduled Emails ▼	
★ Score Report Sustainable Procurement	Info ▼	Scheduled Emails ▼	Edit

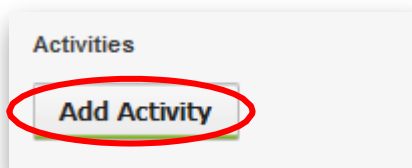
On the left-hand side of the screen, click on the **Select Parameters** section.



Remove the retired activity by clicking on the blue **(x)** that appears on the right-hand side of the activity name and press **Ok**.



Click the **Add Activity** button.



Search for the old version of the course. Once located, select the Radio button next to the title and press the **Add and Close** button.

N.B If you need to add more courses you can click the **Add** button rather than closing the wizard each time.

Search: Entire Catalogue

Filters:

Type: ☐ Assessment (14) ☐ eBriefing (1) ☐ eLearning (11) ☐ Programme (9)

Category: ☐ Mortgage ASSESS - Regulatory Essentials (2) ☐ Specialist technical modules (1) ☐ Financial ASSESS - Regulatory Essentials (2) ☐ Business Environment (1) ☐ Compliance, supervision and regulatory requirements (1) ☐ Treating Customers Fairly (1) ☐ Regulation (2) ☐ Regulation and Compliance (1) ☐ Structured (5) ☐ Programme (3) ☐ More...

Status: ☐ Active ☐ Archived ☐ All

Activity Name		
<input checked="" type="checkbox"/>	*FSA: Treating Customers Fairly - Assessment	Info
<input type="checkbox"/>	*Treating customers fairly (supercisory)	Info
<input type="checkbox"/>	7.10.4 FSA Paper "Treating Customers Fairly - Structured investment products"	Info
<input type="checkbox"/>	Arrears and Possessions - Module I - Showing you are Treating Customers Fairly in all A&P cases	Info
<input checked="" type="checkbox"/>	Mortgages and home financing: Treating customers fairly assessment	Info
<input checked="" type="checkbox"/>	Regulation: Treating Customers Fairly Assessment	Info
<input type="checkbox"/>	Showing you are Treating Customers Fairly in all A & P cases	Info

Click **Save** once you are happy with the setup of the report.