

**Oracle® User Productivity Kit**  
User and Content Management

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**ORACLE®**

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# User and Content Management

# 1 Understand the Manager User Interface

The Manager interface opens in a browser. The Manager title bar has links on the right. Each link provides access to a page to manage a different area. Several pages are grouped together under a More link.

The links that appear are:

- **Users:** The User Management page provides options to create, edit and delete user accounts. The default administrator account is created during installation and cannot be deleted.
- **User Groups** (available only in Professional edition): The User Group Management page provides options to create, edit and delete groups of users. The default All Users group is created during installation and cannot be deleted.
- **Knowledge Paths** (available only in Professional edition): The Knowledge Path Management page provides options to arrange the content of the titles on the server into curricula, including assessments, and to enroll users and user groups in the knowledge paths.
- **Titles:** The Title Management page provides options to import and re-import titles. In Professional edition, you can also edit title properties.

You can access the following pages through the More link:


- **Custom User Fields** (available only in Professional edition): The Custom User Field Management page provides options to create data fields to add to the user profile.
- **Path Category** (available only in Professional edition): The Knowledge Path Categories Management page provides options to create categories which enable you to group similar Knowledge Paths together on the enrollment page.
- **Workgroups** (available only in Professional edition): A workgroup is an organizational group of users, user groups, and knowledge paths. The default Master workgroup is created during installation and cannot be deleted. In a default installation, the display of multiple workgroups is disabled. If you want to use multiple workgroups, you must first enable the display. See *Enable Multiple Workgroups* in the Use Workgroups chapter of this guide for more information.
- **Server:** The Server Management page provides options to configure the server, including user permissions on the server, setting an email address for the server, and specifying a default language.
- **Reference:** This option provides links to launch the documentation in Adobe Acrobat (.pdf) format.



## 1.1 Search and Filter Lists


There are several pages that have the potential to have long lists, such as User Management. A Search option is available on these pages. Searchable criteria varies depending on the page information. For example, you can perform a search in the User Management page to find a user by first, last, and/or username fields, as well as email address. You can use the Search option to search for a specific item by entering an exact name, or you can enter a part of a name or even a single letter to filter the list.



After you perform a search, the results list may still be too long to fit in a single page. There are several ways to change the display of the results. On the right, above the results list, a field displays the number of the current page and total number of pages. You can use the

arrow next to this field to go to a specific page in the list. In addition there are arrows < and >, which scroll back and forward a page at a time. The default number of results on a page is 25. You can use the Records Per Page list to change this to 50 or 100, or Show All the results.

 To search for a specific item in a list:

1. Click in the **search** field.
2. Enter the text you want to find (for example, a user name).
3. Click  or press ENTER.
4. Click  to clear the search results.

 To filter the list to show a group of items:

1. Click in the **search** field.
2. Enter part of the text for which you want to search, such as a letter or a partial word.
3. Click  or press ENTER.
4. Click  to clear the search results.

## 1.2 Select (available only in the Professional edition)

On pages where you can enroll multiple users in a user group or a knowledge path, or enroll a user in multiple knowledge paths or user groups, checkboxes appear to the left of the items in the list. You can select the items manually by clicking the checkboxes. However, above the list, there are Select options which enable you make multiple selections easily. With these options, you can select All of the items, None of the items, the items which are already Enrolled, or the items which are already Unenrolled.

 To select items:

1. To select a single item, click the checkbox to the left.
2. To select all of the items in the list, click **All**.
3. To select no items in the list (for example, to clear a selection) click **None**.
4. To select all items which are already enrolled, click **Enrolled**.
5. To select all items which are not already enrolled, click **Unenrolled**.

## 1.3 Sort

Information that appears in a table form can be sorted by column headings. Clicking a column heading sorts the items in the table by the information in that column in ascending order. Each time you click the column heading, you reverse the sort order.

You can only sort on column headings that appear with a link (an underscore).

 To sort a list:

1. Click the heading of the column you want to sort by.

2. To reverse the sort, click the column heading again.

## 1.4 Workgroup option (available only in the Professional edition)

A Workgroup option may appear at the top of various pages. When users, user groups, knowledge paths, titles, and knowledge path categories are created, they belong to a specific workgroup, which is the Master workgroup. If you create additional workgroups, they are available in the Workgroup list. Selecting a different workgroup limits the list on the page to the items which belong to that workgroup.

This option appears only if the following three criteria are met:

- You are using the Professional edition.
- An administrator has enabled the Display Workgroups option on the server. See *Enable Multiple Workgroups* in the Use Workgroups section for more information.
- You have created multiple workgroups. See *Create a Workgroup* in the Use Workgroups section for more information.



---

## 2 Manage Users

Users must have an account before they can access the content. You can add user accounts manually, or users can add themselves during login to the Knowledge Center.

**Note:** An administrator account is created during installation. It cannot be deleted.

### 2.1 Create a User

When you create a user, you enter basic information such as last name, first name, user name, and password. In addition, user properties include user permissions and start/end dates for the account. There may also be custom user fields, some of which may be required. However, only a user with Manager rights can assign permissions and dates to an account.

Expert Advice enables users to communicate with subject matter experts as they take subjects. If you are using the Expert Advice feature, you can set a user as an expert. You can also allow users to run specific custom reports, if available.

If you are using Windows authentication, you can add a new user by adding the username in this format: <domain>/<user>. The password field is not available, as the password is not stored in Knowledge Center.

### 2.2 User Properties

#### User Details

Some fields are mandatory and require an entry to create a new user account. Mandatory fields are indicated by a red asterisk in the interface.

The available fields are:

- **Last Name:** Mandatory field in which you type the user's last name. The name can be any alphanumeric string up to 50 characters in length. The last name is the user's actual last name, and is not to be confused with the username used to log in.
- **Middle Initial:** Not mandatory; however, you can type the user's middle initial in this field, if desired.
- **First Name:** Mandatory field in which you type the user's first name. The name can be any alphanumeric string up to 50 characters in length. The first name is the user's actual first name, and is not to be confused with the username, which is used to log in.
- **Username:** Mandatory field in which you specify the username that the user enters to log in. The username can be any alphanumeric string up to 50 characters in length. It can be generated automatically from the entries in the First Name and/or Last Name fields when the Username Field Using This Pattern option is enabled at the workgroup level.
- **E-mail Address:** Not a mandatory field. If the Expert permission is enabled and email is used for expert and user communication, the e-mail address is necessary. Experts are subject matter experts to whom users can submit questions while taking subjects. To receive these questions via email, the expert's email address must be provided. The email address can be set to any alphanumeric string up to 255 characters in length. If the email field is left blank for an expert or user, questions and answers can be posted in Knowledge Center.
- **Password:** The password field for the user account. While it is a good idea to include a password for a user account, this field is only mandatory when the Have Blank Passwords option is disabled at the server level. If this option is enabled, it is not necessary to enter a password to create the user account. If a password is created, the user needs to enter this password when logging in. The password can be set to

any alphanumeric string up to 50 characters in length. Passwords are case-sensitive.

- **Confirm Password:** The password field for the user account. Account passwords are entered again for verification.
- **Start Date:** Optional field that allows a Manager to set a date that the username and password are valid on the system. Before this date, the user is unable to log in. If this field is left blank, the account is valid immediately.
- **End Date:** Optional field that allows a Manager to set a date that the username and password expire. On this date, the user can no longer log in. Dates can be typed in any format and are converted to the mm/dd/yyyy format. If the End Date field is left blank, the account never expires. The default administrator account, set up during installation, cannot be set to expire.
- **Active:** If this option is disabled, the user is inactive and cannot log in. This feature enables a Manager to suspend user accounts when necessary. By default, inactive accounts are not included in reports, although some reports allow you to include them.
- **Custom user fields** (available only in Professional edition): Custom user fields created on the server are listed below the standard fields. Custom fields may be mandatory; the names of mandatory custom user fields have a red asterisk next to them in the interface.

## Permissions

User permissions determine the specific administrative functions a user may perform. A user may be given any number of permissions or none at all. The default is no administrative access.

- **System Administrator:** Has full access to all features and can act as an expert. Users with this permission see a Manager link on the Knowledge Center home page.
- **Manager:** In a Professional edition installation, has full access to a particular workgroup. The manager sees only what is available to that workgroup. Workgroup managers can create and maintain users, user groups, knowledge paths, path categories, and titles for the workgroup to which they are assigned. Users with this permission see a Manager link on the Knowledge Center home page. Managers also have a Reporter link and are able to run reports.

In a non-Professional edition installation, a Manager has full access to create and maintain users and titles and run reports.

- **Reporter:** Can run a variety of reports. Users with this permission see a Reports link on the Knowledge Center home page.
- **Expert** (available only in Professional edition): If the Expert Advice feature is enabled, you can assign the Expert permission to a user. An expert is a subject matter expert to whom users can submit questions as they take subjects in the Knowledge Center. When a user is identified as an expert, he/she can be selected as an expert for specific titles. If this permission is enabled, the E-mail Address field must be completed for the expert to receive notification via email that questions were posted. If an email address is not provided, the expert can check for questions in the Knowledge Center and respond accordingly. An expert can also run a report from the Get Expert Advice page that displays questions and answers.
- **Feedback Monitor:** A feedback monitor can view comments and run a report from the Review Feedback page. When a user is identified as a feedback monitor, he/she is then selected as a monitor for specific titles.

## External Reports (available only in Professional edition)

Lists the external reports that are available. With Administrator permission, all external reports are displayed and cannot be deselected. With Manager permission, only the external reports available to that workgroup display and cannot be deselected. With Reporter permission, only the external reports available to the workgroup display. The reports are deselected and can be selected.

### **Expert Advice** (available only in Professional edition)

If the Expert Advice feature is enabled and the user has been assigned the Expert permission, a list of titles appears. You can assign the user as an expert for specific titles.

### **Titles Available for Feedback**

Lists the titles for which users can enter feedback. You can assign the user as a monitor for specific titles.

### **Clear Tracking Data**

You can use this to clear all tracking data for the user. This deletes all history of the subjects a user has taken, including assessment scores.

### **Change Workgroup**

You can move a user to another workgroup. This is helpful if you want to delete or consolidate workgroups, but do not want to lose users or tracking data.


 To create a user:

1. Display the User Management page.
2. Click **Create User**.
3. Enter the required and optional information for the user properties.
4. Click **Save**.


## **2.3 Edit/Delete a User**

You can edit a user at any time, to change a password or change enrollments. You can delete users you no longer need (for example, an employee who leaves the company). When you delete a user, all tracking data for the user is also deleted.

 To edit a user:

1. Display the User Management page.
2. Use **search** or scroll to locate the user you want to edit.
3. Click  in the **Edit** column for the user you want to edit.
4. Change the user properties as desired.
5. Click **Save**.

 To delete a user:

1. Display the User Management page.
2. Use **search** or scroll to locate the user you want to delete.
3. Click  in the **Delete** column for the user you want to delete.
4. Click **OK** to confirm the deletion.

## 2.4 Import Users

The User Import utility can be used to create new users or update existing accounts in the Knowledge Center database without having to add each user separately using the Knowledge Center Manager. You can easily add large numbers of users as well.

The User Import utility imports a tab-delimited text file (.txt) or an Excel spreadsheet (.xlsx), or uses a database connection to populate the appropriate fields in the Knowledge Center database. Each column of data corresponds to a field in the database. For text and Excel files, the first row in the file must be the header row. You can save the file with any name, but it must be saved with an extension of .txt for text or .xlsx for Excel. When importing using a database connection, you configure a database connection and build a field mapping between the Knowledge Center and the other system. The connection string is stored in a file specified by the user. See *Configuring a Database Connection for Import* in this section for more information.

**Note:** Although the User Import utility is used with the Knowledge Center, it is not installed as part of the Knowledge Center. To install the User Import Utility, you must select the User Import Utility during the installation process. This creates a Knowledge Center User Import program group. You can launch the User Import utility with the User Import icon in the program group.

### 2.4.1 Set Up the Data File

The following are the headings that must appear in the header row. For all data files, you must include all fields, in the order indicated in this list. Data must exist for the USERNAME through LASTNAME fields, but MINIT, EMAIL, and NTINTEGRATED fields can be empty. Field order is not important when using a database connection because the system orders the fields appropriately.

- USERNAME: Corresponds to the Username field.
- PASSWORD: Corresponds to the Password field.
- FIRSTNAME: Corresponds to the First Name field.
- LASTNAME: Corresponds to the Last Name field.
- MINIT: Corresponds to the Middle Initial field.
- EMAIL: Corresponds to the E-mail field.
- NTINTEGRATED: Corresponds to the NT Integrated option.

You can also include optional fields in the file, if desired. If used, these fields must appear in the order specified in the list below and they must appear after the required fields.

- USERGROUP: Should reflect the name of all user groups in which a user is to be enrolled. User groups do not have to exist in the database prior to running the User Import Utility. If the user group does not exist on the server, it is created. After importing the data, view the User groups page to see that the new user group was created.
- STARTDATE: Corresponds to the Start Date field. Dates can be typed in any format and are converted to the m/d/yy format.
- ENDDATE: Corresponds to the End Date field. Dates can be typed in any format and are converted to the m/d/yy format.
- Custom User Fields: Custom user fields must exist in the Knowledge Center database; otherwise, they are ignored during the import process. In addition, if a custom user

field is required and no value exists in the field for a particular user, an account is not created in the Knowledge Center for that user and an error is generated in the log.

For text or Excel files, the name in the header row must be identical to the custom field name in the database. Type the field name in capital letters and if the name includes multiple words (for example, Sales Territory), include the appropriate spaces in the header row. In addition, the data in the data file must be of the same type as the custom user field in Manager (for example, text should be in the data column for a text custom user field, date/time in the data column for a date/time custom user field, and so on.).

To specify values for Boolean custom user fields, use 0 to indicate "false" and 1 to indicate "true." To specify multiple values for a data field (for example, an Unordered List custom user field or multiple user groups to which one user belongs), separate each value with a comma.

**Note:** The option to set NT integration is read from the login address. If that address is entered via NT integration, then all addresses are set to require NT authentication.

## 2.4.2 Configuring a Database Connection for Import

User information can be imported through an external connection to a database by configuring a connection string to access the database. You can build the connection in one of three ways: build the connection string; build the connection to the Active Directory; or manually enter the string as part of the Database Connection Wizard.

- Microsoft SQL Server  
Data Provider = System.Data.SqlClient  
Data Source=<server name>;Initial Catalog=<database name>;Integrated Security=True
- Oracle Database  
Data Provider = System.Data.OracleClient  
Data Source=<server name>;Persist Security Info=True;User ID=<username>;Password=<userpassword>;Unicode=True
- Active Directory (AD)  
Data Provider = System.Data.OleDb  
Provider=ADSDSOObject;User Id=<domain>\<username>;Password=<userpassword>

After the connection has been established, you must map the database base fields to the corresponding Knowledge Center database fields. See *Set up the Data File* for more information on Knowledge Center data fields. Once the configuration is saved, it can be run from the command line, as needed.

**Note:** The Knowledge Center supports only one database connection at a time.

 To build a database connection string:

1. From the User Import Utility dialog box, click **Database Connection**.
2. Click **Configure** to start the Database Configuration Wizard.
3. Click **Next** to display the next configuration screen.
4. To build a connection string, click **Build Connection String**, then click **Build**.
5. Choose the desired data source and data provider for the database connection and click **OK**.

6. Select the server name and the name of the database to which you want to connect.
7. Click **Test Connection** to confirm the connection, then click **OK**.
8. Click **Next** to move to the next configuration screen.
9. On the Data Connection Wizard - Step 2 of 5 screen, click **Build** next to the **Data source for user data** field, click **Table Name** or **View Name** and type the table name, SQL Statement or View name to be used as the source of the user data in the **Edit** field.
10. Enter (or choose from the list) the required user profile fields and any optional fields that correspond to the Knowledge Center database files, select the Domain Prefix, check the domain name is correct in the Domain field if the Active Directory is used as the source for the user import, then click **Next**.
11. This screen displays only custom user fields that are already configured in the Knowledge Center (with the exception of multi-selection list type custom user fields). The **Data source for user data** field (read only) displays the selection statement entered as the source of the custom user data. Enter (or choose from the list) the required custom user fields that correspond to the Knowledge Center database files, then click **Next**.
12. This screen displays user group information. Since this information can have multiple values, you must re-associate the user group name with the appropriate user group values. Click **Use same source selected for user data** if the user group data is in the same data source selected for the user data.

or

Click **Build** to create a connection to a different data source. Once the connection is established, click **OK**.


13. Click **Next**. This screen displays a preview of the all the data fields entered and their corresponding values. If the data is incorrect, click **Back** to navigate back through the wizard to make corrections. When all data is correct, click **Next**. The configuration data is saved to the app.config file.
14. Click **Finish** to return to the User Import utility to complete the import process.
15. Enter the desired name in the **Config File Name** field.

or

Navigate to an existing file.

16. Click **Save** to save the new configuration.
17. Select the workgroup to which the users are being imported, then navigate to the text file containing the data to import.
18. Choose either or both the **Modify existing Users** and/or **Make users inactive if they are not part of the import** options.


**Note:** Modify Existing Users allows you to update information on existing users. If you do not select this option, only new users are added to the database. Make Users Inactive If They Are Not Part Of The Import allows you to deactivate any users in the system that are not currently in the set of users being imported.

 To build a connection to the Active Directory:

1. From the User Import Utility dialog box, click **Database Connection**.
2. Click **Configure** to start the Database Configuration Wizard.
3. Click **Next** to display the next configuration screen.
4. To build connection to Active Directory, click **Build connection to Active Directory** and click **Build**.
5. Enter the desired Domain, User Name, Password and Confirm Password and click **OK**.
6. Click **Next** to move to the next configuration screen.
7. Click **Build** for the Data source for user data.
8. On the Data Connection Wizard - Step 2 of 5 screen, click **Default Active Directory Script** to populate the SQL Statement field with the default selection statement from the Active Directory.
9. Modify the "DC=" items to match your fully qualified domain. For example, corporate.com would be "DC=corporate,DC=com" or corporate.us.com would be "DC=corporate,DC=us,DC=com"). The "DC=" needs to be built out for each domain section that is separated by the ".". The "DC=local" would not be correct unless your domain is "corporate.local".
10. Click **Test**.
11. Enter (or choose from the list) the required user profile fields and any optional fields that correspond to the Knowledge Center database files, select the Domain Prefix, check the domain name is correct in the Domain field if the Active Directory is used as the source for the user import, then click **Next**.
12. This screen displays only custom user fields that are already configured in the Knowledge Center (with the exception of multi-selection list type custom user fields). The **Data source for user data** field (read only) displays the selection statement entered as the source of the custom user data. Enter (or choose from the list) the required custom user fields that correspond to the Knowledge Center database files, then click **Next**.
13. This screen displays user group information. Since this information can have multiple values, you must re-associate the user group name with the appropriate user group values. Click **Use same source selected for user data** if the user group data is in the same data source selected for the user data.  
  
or  
  
Click **Build** to create a connection to a different data source. Once the connection is established, click **OK**.
14. Click **Next**. This screen displays a preview of the all the data fields entered and their corresponding values. If the data is incorrect, click **Back** to navigate back through the wizard to make corrections. When all data is correct, click **Next**. The configuration data is saved to the app.config file.
15. Click **Finish** to return to the User Import utility to complete the import process.
16. Enter the desired name in the **Config File Name** field.  
  
or  
  
Navigate to an existing file.

17. Click **Save** to save the new configuration.
18. Select the workgroup to which the users are being imported, then navigate to the text file containing the data to import.
19. Choose either or both the **Modify existing Users** and/or **Make users inactive if they are not part of the import** options.

**Note:** Modify Existing Users allows you to update information on existing users. If you do not select this option, only new users are added to the database. Make Users Inactive If They Are Not Part Of The Import allows you to deactivate any users in the system that are not currently in the set of users being imported.

 To manually enter a connection string:

1. From the User Import Utility dialog box, click **Database Connection**.
  2. Click **Configure** to start the Database Configuration Wizard.
  3. Click **Next** to display the next configuration screen.
  4. To manually create a connection string, click **Manually create connection string**.
  5. Select or enter the desired **Data Provider** and enter the **Connection String**.
  6. Click **Test Connection** to confirm the connection, then click **OK**.
  7. Click **Next** to move to the next configuration screen.
  8. On the Data Connection Wizard - Step 2 of 5 screen, click **SQL Statement** to enter the select statement for user data, click the **Test** button to test the connection, then click **OK**.
  9. Enter (or choose from the list) the required user profile fields and any optional fields that correspond to the Knowledge Center database files, select the Domain Prefix, check the domain name is correct in the Domain field if the Active Directory is used as the source for the user import, then click **Next**.
  10. This screen displays only custom user fields that are already configured in the Knowledge Center (with the exception of multi-selection list type custom user fields). The **Data source for user data** field (read only) displays the selection statement entered as the source of the custom user data. Enter (or choose from the list) the required custom user fields that correspond to the Knowledge Center database files, then click **Next**.
  11. This screen displays user group information. Since this information can have multiple values, you must re-associate the user group name with the appropriate user group values. Click **Use same source selected for user data** if the user group data is in the same data source selected for the user data.
- or
- Click **Build** to create a connection to a different data source. Once the connection is established, click **OK**.
12. Click **Next**. This screen displays a preview of all the data fields entered and their corresponding values. If the data is incorrect, click **Back** to navigate back through the wizard to make corrections. When all data is correct, click **Next**. The configuration data is saved to the app.config file.



13. Click **Finish** to return to the User Import Utility to complete the import process.
14. Enter the desired name in the **Config File Name** field.  
or  
Navigate to an existing file.
15. Click **Save** to save the new configuration.
16. Select the workgroup to which the users will be imported, then navigate to the text file containing the data to import.
17. Choose either or both the **Modify existing Users** and/or **Make users inactive if they are not part of the import** options.

**Note:** Modify Existing Users allows you to update information on existing users. If you do not select this option, only new users are added to the database. Make Users Inactive If Not Part Of The Import allows you to deactivate any users in the system that are not currently in the set of users being imported.

### 2.4.3 Run the User Import Utility

When you run the User Import utility, you need to log in. After logging in, the User Import Utility dialog box opens. Select the Config File Name created when you configured the database connection.

**Note:** If you receive a Proxy Authentication dialog box when you log in to the User Import utility, enter your username and password for the proxy server. If you select the Save my password option, the username and password information is encrypted and saved to the kcLogin.xml file in the path for the application data, for example c:\Users\\AppData\User Productivity Kit (Windows 7). If your password changes for the proxy server, you can open this file in a text editor and delete the tags <ProxyAuthentication> and </ProxyAuthentication> and all the text in between. This will cause the Proxy Authentication dialog box to open the next time you log in so that you can enter your new password.

Before starting the import process, you can modify the previously created information and save the configuration file again.

After importing the data file, you can view new and/or modified user accounts in the Manager.

The User Import utility creates a configuration file with the name selected in the Config File name field <configfile.xml>. Additionally, each time the User Import utility is run, as a Window application (not command line), it creates a log file that can be viewed by clicking the View Log button on the Importing Users dialog box. The location of the log file displays on the dialog box.

 To run the User Import utility:

1. From the Knowledge Center User Import Utility program group, click **User Import**.
2. Enter a username and password, and select the appropriate language and workgroup, if necessary. Select the desired server in the **Connect to** list, if necessary. Click **OK**.
3. If the configuration file already exists, select or enter the configuration file name, click **Load**. Skip to step 6.
4. Navigate to the text file containing the data to import, then select the workgroup to which the users are being imported.

5. Choose either or both the **Modify existing Users** and/or **Make users inactive if they are not part of this import** options.

**Note:** Modify existing Users allows you to update information on existing users. If you do not select this option, only new users are added to the database. Make users inactive if they are not part of this import allows you to deactivate any users in the system that are not currently in the set of users being imported.

6. Select **Import Users**.
7. Click **OK**.
8. Click **Exit**.

## 2.4.4 Run the User Import Utility from a Command Line

You can run the User Import utility from a command line with the configuration file as a command line argument. This allows you to add or update users as part of a batch process that can be scheduled and run automatically at times that you specify.

After you set up a data file (as detailed above) and run the User Import utility, run `UserImport.exe <file name>.xml` at the command line. Knowledge Center uses the configuration setting file `<file name>` (created by User Import Utility), which contains the path to all the necessary configuration information (including username and password).

**Note:** You must put the path for the `UserImport.exe` file in the batch file, or issue a command to change into the appropriate directory first. If the path to the `UserImport.exe` or the settings file contains spaces, you must enclose the entire path in quotes. A log file called `<file name>.log` is created in the same folder where the configuration file was created.

## 2.5 Enroll a User in Knowledge Paths (available only in the Professional edition)

Enrolling users in knowledge paths gives them access to the content. There are several ways a user can be enrolled in a knowledge path:


- **Self enrollment:** The user chooses to enroll in a knowledge path on the Knowledge Paths page. This is similar to an "elective" course, and the user can unenroll from the course as well. For this option to be available, self-enrollment must be enabled at the workgroup level, as well as on the knowledge path itself.
- **User group enrollment:** The user is enrolled in the knowledge path because he or she is a member of a user group that is enrolled in the knowledge path. The user cannot choose to enroll or unenroll; this is a required course.
- **Admin enrollment:** The user has been enrolled in the knowledge path by an Administrator or a Manager. The user cannot choose to enroll or unenroll on their own; this is a required course.

From the User Properties page, you can access the Knowledge Path Enrollment subpage for a user. The knowledge paths available for the workgroup are listed here. There are several columns which tell you whether the user is enrolled in a knowledge path, and if so, what type of enrollment. The User group Enrolled column indicates whether a user is enrolled in a knowledge path as part of a user group. The Allow Self Enroll column indicates whether self-enrollment is allowed for the knowledge path. In the Self Enrolled column, a check indicates that the user has enrolled themselves in the path. The Admin Enrolled allows an Admin or a Manager to enroll the user in the path. The Start Date and End Date columns allow you to put date restrictions on access to the path. If you enter dates other than the defaults, the user will only be able to access the path between those dates.

The checkboxes to the left of the path name allow you to select multiple paths and use the

Enroll and Unenroll options. You can also use the Select options to select multiple paths.

 To enroll or unenroll a user in knowledge paths:

1. Display the User Management page.
2. Use **search** or scroll to locate the user.
3. Click  in the **Edit** column for the user.
4. Click **Knowledge Path Enrollment**.
5. Use Search, sort the list, or scroll the list of knowledge paths as necessary.
6. Select the checkbox in the Self Enrolled or Admin Enrolled column to enroll the user in that path, or deselect the checkbox to unenroll them.

or

Use the Select options to select the path and click **Admin Enroll**, **Admin Unenroll**, **Self Enroll**, or **Self Unenroll**.

7. Enter Start and End dates, as appropriate.


## 2.6 Enroll a User in User Groups (available only in the Professional edition)

You can enroll a user in one or many user groups. User groups simplify the task of assigning users to knowledge paths. If a user is enrolled in a user group that is enrolled in a knowledge path, the user has immediate access to the knowledge path.

There is a default All Users user group. Each time a new user account is created, it is automatically added to this user group.

From the User Properties page, you can access the User Group Enrollment subpage for the user you are editing. The available user groups are listed here. Checkboxes selected on the right of the user group names indicate the groups in which the user is enrolled. The checkboxes to the left of the user group name allow you to select multiple user groups and use the Enroll and Unenroll options.

 To enroll or unenroll a user in a user group:

1. Display the User Management page.
2. Use Search or scroll to locate the user.
3. Click  in the **Edit** column for the user.
4. Click **User Group Enrollment**.
5. Use Search, sort the list, or scroll the list of user groups as necessary.
6. Select the checkbox in the Enrolled column to enroll the user in that user group, or deselect the checkbox to unenroll the user.

or

Use the Select options to select the user groups and click **Enroll** or **Unenroll**.

## 3 Manage User Groups (available only in the Professional edition)


A user group is a grouping of users that you define. Placing users into user groups simplifies the task of assigning knowledge paths. By assigning a knowledge path to a user group, you can make that assignment to many users at once.

A user may be a member of one or more user groups. The All Users user group is included by default. This user group cannot be deleted and includes all users created for the workgroup. Each time a new user account is created, it is automatically added to this user group. This group is helpful when you want your entire organization enrolled in a particular knowledge path. You can enroll this user group in the desired knowledge path and give all users access to the training immediately. This group is also helpful when you want to run a report for all users.

**Note:** If you create multiple workgroups, each workgroup has its own user groups, including an All Users user group for the workgroup.

### 3.1 Create a User Group

There are only two properties for a user group: the name and whether to add new users automatically. The name can be any alphanumeric text up to 50 characters. The Add New Users Automatically option causes new user accounts added to the current workgroup to become part of this user group automatically. When this option is disabled, new users are not added automatically but can be added manually. For most user groups, this option should not be selected. Otherwise, the user group is most likely include users that do not belong to it.

 To create a user group:


1. Display the User Group Management page.
2. Click **Create User Group**.
3. Enter a name for the user group.
4. Select the **Add new users automatically** option, if desired.
5. Click **Save**.

### 3.2 Edit/Delete a User Group


You can change the name of a user group as necessary. You can also change the Add New Users Automatically option. This can be useful if you are creating several users that should be in the user group. You can select the option, add the users, and then turn it back off again.


You can delete a user group you no longer need. When you delete a user group, only the group is deleted, not the accounts in the group. However, when you delete a user group, all tracking data for the group is also deleted.

 To edit a user group:

1. Display the User Group Management page.
2. Use Search or scroll if necessary to locate the user group you want to edit.
3. Click  in the **Edit** column for the user group you want to edit.
4. Change the user group properties as desired.

5. Click **Save**.

 To delete a user group:

1. Display the User Group Management page.
2. Use Search or scroll if necessary to locate the user group you want to delete.
3. Click  in the **Delete** column for the user group you want to delete.
4. Click **OK** to confirm the deletion.


### 3.3 Enroll a User Group in Knowledge Paths

You can assign user groups to knowledge paths. The benefit of assigning a user group to one or more knowledge paths is that new users added to the group have access to those paths immediately.

From the User Group Properties page, you can access the Knowledge Path Enrollment subpage for a user group. The knowledge paths available are listed here. The Allow Self Enroll column indicates whether a user can enroll himself or herself in the knowledge path. In the Enrolled column, a check indicates that the user group is enrolled in the path. The Start Date and End Date columns allow you to put date restrictions on access to the path. If you enter dates other than the defaults, the members of the user group are only able to access the path between those dates.

The checkboxes to the left of the path name allow you to select multiple knowledge paths and use the Enroll and Unenroll options. You can also use the Select options to select multiple paths.

 To enroll or unenroll a user group in knowledge paths:

1. Display the User Group Management page.
2. Use Search or scroll if necessary to locate the user group.
3. Click  in the **Edit** column for the user group.
4. Click **Knowledge Path Enrollment**.
5. Use Search, sort the list, or scroll the list of knowledge paths as necessary.
6. Select the checkbox in the Enrolled column to enroll the user group in that path, or deselect the checkbox to unenroll the user group.

or

Use the Select options to select paths and click **Enroll** or **Unenroll**.

7. Enter Start and End dates, if appropriate.

### 3.4 Enroll a User Group in Titles


Users can launch titles through the Player link on the Knowledge Center home page. However, launching specific titles can be restricted to users in certain user groups using the Secure Title to Specific User Groups option on the Title Properties page. If this option is selected for a title, you can give a user group access to launch the title on the Title Enrollment page.


You can access the Title Enrollment subpage for a user group from the User Group Properties

page. The titles available are listed here. In the Enrolled column, a check indicates that the user group is enrolled and members of the user group can launch the title directly.

The checkboxes to the left of the title name allow you to select multiple titles and use the Enroll and Unenroll options. You can also use the Select options to select multiple titles.

**Note:** Titles imported from content sources other than the Developer do not appear in this list, since they cannot be launched from the Player link.

 To enroll or unenroll a user group in titles:

1. Display the User Group Management page.
2. Use Search or scroll if necessary to locate the user group.
3. Click  in the **Edit** column for the user group.
4. Click **Title Enrollment**.
5. Use Search, sort the list, or scroll the list of titles as necessary.
6. Select the checkbox in the Enrolled column to enroll the user group in that title, or deselect the checkbox to unenroll it.

or


Use the Select options to select titles and click **Enroll** or **Unenroll**.

### 3.5 User Enrollment in a User Group

You can enroll multiple users in a user group at one time. This is helpful if you create a new user group and then need to select the members from a list of existing users.

From the User Group Properties page, you can access the Users subpage for the user group you are editing. The users in the workgroup are listed here. Checkboxes selected on the right of the user names indicate the ones who are enrolled in the group. The checkboxes to the left of the user names allow you to select multiple users and use the Enroll and Unenroll options.

 To enroll or unenroll multiple users in a user group:

1. Display the User Group Management page.
2. Use Search or scroll if necessary to locate the user group.
3. Click  in the **Edit** column for the user group.
4. Click **User Enrollment**.
5. Use Search, sort the list, or scroll the list of users as necessary.
6. Select the checkbox in the Enrolled column to enroll a user in the user group, or deselect the checkbox to unenroll them.

or

Use the Select options to select the users and click **Enroll** or **Unenroll**.

## 4 Manage Knowledge Paths (available only in the Professional edition)

The titles and assessments installed on the server are used to create activities. Related activities are then organized into knowledge paths, which constitute curricula. Once knowledge paths are created, users and/or user groups can be assigned to them, and then users can access the training content through their browsers.

These are many of the key concepts involved in presenting content in Knowledge Pathways.

- **Titles, Content Objects, and Subjects:** Each title is made up of content objects. In creating a knowledge path, you can choose to present end users with the entire title or a particular content object only. For example, you create a title called *Working with Access*. The group for which you are creating a knowledge path needs training on the reports feature only. In this case, you could create a knowledge path using the *Understanding Reports* content object, without including the rest of the outline. The content object selected for a knowledge path is presented as the subject in the Knowledge Center. The end user views the included subject content only and is unaware as to whether the knowledge path is using an entire title or only part of it.
- **Assessments:** An assessment is a series of questions. Assessments can come before (pre-assessments) and/or after a subject (post-assessments). The assessment interface in the Knowledge Center provides the user with questions one at a time and tabulates the user's score. You can use assessments to control the way in which users move through the training material by allowing a user to place out of the subject, or by requiring a specific score to advance to the next item in the knowledge path.
- **Activities:** Subjects and assessments are grouped into activities. Typically, each activity consists of a subject and a pre- and/or a post-assessment. However, it is possible to create an activity consisting of a subject only or assessments only. In creating activities, you decide whether to use an entire title or a particular content object for the subject. In addition, once the subject is selected, you need to determine which assessments are presented with the subject, as well as when and how they are presented.

There is a wide variety of options for presenting material. In creating activities, you may decide whether to require a particular subject or assessment, require a specific score on an assessment, place restrictions on the navigation of a subject, alter the various types of feedback users receive after answering questions, as well as determine prerequisites for the training.

- **Knowledge Paths:** A knowledge path is a series of activities. By organizing activities together in a logical fashion, you can use knowledge paths to develop a curriculum path for users. You can then assign users and user groups to knowledge paths.

Knowledge Paths are visible to users in the Knowledge Center. On the Knowledge Paths page, users can see the knowledge paths to which they are assigned. After selecting a knowledge path, users can view the subjects and assessments that make up the path, including all knowledge path items that are not available immediately due to prerequisites.

The Knowledge Paths page includes an *Enroll or Withdraw from Knowledge Paths* link that enables users to self-enroll in optional knowledge paths, as well as withdraw from them.

### 4.1 Types of Knowledge Paths

There are three types of knowledge paths:

#### Single-Activity

A knowledge path that contain just one activity. Single-activity knowledge paths allow you to quickly create a path consisting of one title or content object only, along with any desired assessments.

### **Curriculum**

A curriculum knowledge path includes multiple activities that have dependencies on each other. For example, a knowledge path called Working with Word consists of three activities: 1) Basic Word Skills; 2) Everyday Tasks Made Easier; and 3) Applying Formatting. By creating a curriculum knowledge path, you can show users that Basic Word Skills should be taken before Everyday Tasks Made Easier, and Applying Formatting should be taken last. You can set knowledge path options to require users to progress through each level of the knowledge path as structured, or allow users to navigate the path based on their knowledge base.

### **Organizational**

An organizational knowledge path contains multiple activities that have no dependencies on each other. For example, a knowledge path called Microsoft Office Basics consists of four activities: 1) Access Fundamentals; 2) Basic Excel Skills; 3) Introduction to PowerPoint; 4) Introduction to Word. By creating an organizational knowledge path, you can display each activity at the same level, enabling users to navigate the activities in any order desired. Therefore, if the user wanted to take Introduction to PowerPoint before Access Fundamentals, he/she could in this scenario.

**Note:** It is possible to create curriculum knowledge paths within an organizational knowledge path.

## **4.2 Create a Knowledge Path**

Creating a knowledge path has two basic steps. First, you give the path a name and define its properties on the Path Properties page. Then, you add activities and content to the path to create the series of subjects and assessments through which a user progresses.

### **General**

- **Name:** The name can be any alphanumeric string up to 255 characters in length. It is this name that appears in various knowledge path enrollment pages, and the name users see on the Knowledge Paths page in the Knowledge Center.
- **Path Categories:** Knowledge Paths available to users on the Knowledge Paths page are listed by category. By default, knowledge paths are placed in the General category. While it is not required to categorize knowledge paths, it can help end users navigate a long list of paths in the Knowledge Center. This option lists all path categories available; select one to add the knowledge path to a category. If there are no categories, you can click the Edit Category link to create them.
- **Active:** When enabled, it means that the knowledge path is currently available in the Knowledge Center, provided users are already enrolled in it or can self-enroll. When this option is disabled, users cannot access the knowledge path.
- **User can Self-Enroll:** For the Self Enroll option to be available for a knowledge path, it must be enabled at the workgroup level. Otherwise, it is not available for selection at the knowledge path level. When the Self Enroll option is enabled, users can enroll in a knowledge path that has not been directly assigned to them by a Manager. The knowledge path is available to users on the Enrollment page in the Knowledge Center, and users have the option to enroll in the path and withdraw from it later as desired. When the knowledge path has been assigned to a user, the knowledge path appears on the Knowledge Paths page in the Knowledge Center. Users cannot withdraw from knowledge paths in which they did not self-enroll.


### **SmartHelp**



Titles imported from Developer can also be used as source content for SmartHelp. SmartHelp is a sidebar that can be opened in a browser which lists applicable help topics for the page that is open in the browser.

Like user groups, you can create groups for SmartHelp sources. If a user subscribes to a SmartHelp group, they are subscribed to all the content sources in the group automatically. Knowledge Center uses the activity hierarchy of knowledge paths to administer SmartHelp groups. For more information about creating SmartHelp groups, see the *In-Application Support* guide. You can access this guide from Manager by pointing to More and then Reference.

- **Enable SmartHelp:** Select this option to allow the knowledge path to be used to define SmartHelp groups.
- **Show SmartHelp Hierarchy:** If the knowledge path is enabled for SmartHelp groups, select this option to display the hierarchy of titles and groups.
- **Public CDD URL:** The link to the location where a user can subscribe to the SmartHelp source. This option is read only.

 To create a knowledge path:

1. Display the Knowledge Path Management page.
2. Click **Create** Path.
3. Enter a name for the path.
4. Select a path category, if desired.
5. Deselect the **Active** option, if desired.
6. Select the **User can Self Enroll** option, if desired.
7. Click **Save**.

### 4.2.1 Add an Activity

Every knowledge path requires a single root activity, which is created automatically when the knowledge path is created. For a single-activity knowledge path, this is the only activity necessary, although in this case you must remember to link content to the activity. You can add sub-activities to the root activity and to other activities to create a curriculum or organizational knowledge path.

Activity properties determine the presentation of subjects and assessments in the knowledge path. This includes the mode of play for a subject, feedback on assessments, and prerequisites.

The activity name can be any alphanumeric string up to 80 characters in length. It is the name that appears in Knowledge Center. The name of the activity can be, but is not required to be, the same as the name of the title or content object being used for the subject in the activity. By default, the root activity name is the same as the knowledge path name; however, you can change this name as desired.

When you add an activity, it is inserted as the last child of the selected activity. If you want it to be at the same level as an existing activity, you must select the parent activity one level above and add it. You cannot add an activity at the level of the root activity; there can only be a single root activity.


#### Activities and Knowledge Path Types



For a single-activity knowledge path, the root activity is the only activity in the knowledge

path and its properties are set for the content object used in the path. You link the content to the root activity.

For a curriculum knowledge path, the root activity represents the starting point for the knowledge path, to which you can add dependent activities. For example, in an Excel knowledge path, the root activity could be Introduction to Excel and the rest of the path could consist of two sub-activities for the intermediate and advanced levels.

For an organizational knowledge path, the root activity uses the default settings (Organization Only) and does not have content linked to it. To the root activity, you can add sub-activities, all at the same level, that are not dependent on one another. For example, in an Office Basics knowledge path, the root activity would be named Office Basics and to that activity, you could add four sub-activities representing the introductory levels of Word, Excel, PowerPoint, and Access.

 To add an activity to a knowledge path:

1. Display the Knowledge Path Management page.
2. Use Search or scroll to locate the knowledge path to which you want to add an activity.
3. Click  in the **Edit** column for the path.
4. Click the **Activities** link.
5. Click  in the **Add** column for the activity which you want to add the new activity.
6. Enter a name for the activity.
7. Click **Save**.

## 4.2.2 Link Content to an Activity

Activities are the "blocks" that you use to build the structure of knowledge paths. These blocks are empty unless you link content to them. In some cases, you may want it to be empty; for example, when you want to create an organizational knowledge path. In most cases, you link content. Once you do, you can set many properties to enhance the user experience and control the user's progress through the path.

By default, the Title Properties field for an activity displays (Organizational Only), which means it is not linked to any content. If content is listed in the field, you can use the Organizational Only button to remove it.

### The Select Content for the Activity Dialog Box

This dialog box displays an alphabetical list of all titles on the server. Titles can be imported from the Developer or from external sources. A check mark in the External column indicates external titles. For a Developer title, the Update Date Time column shows the date and time that the title was imported or last updated, since Developer titles are updated when they are re-imported. For an external title, it shows when the title was imported. Since external titles are not updated when they are re-imported, this column tells you which is the most recent title.


You can click any of the column headings to sort the list by that column. In addition, you can use the search field at the top to locate a specific title. The Show Identifiers option at the bottom of the list displays the unique identifiers for each item in the list.

In a title from the Developer, the selected item determines which assessments are available for use in the activity. An item can include multiple assessments or may not include any. Assessments are not available in external titles.

You can use the same content object in multiple knowledge paths. If a subject or assessment

from Developer content appears in multiple knowledge paths, users are only required to take it one time. If a user starts a new knowledge path using a content object that the user already accessed in a different path, he/she can see the status for the title, not the path.

You can select an entire title for the activity, or you can expand the hierarchy and select an object within the title.

 To link content to an activity:

1. Add a new activity to a knowledge path or edit an existing activity.
2. Click **Browse** next to the Title Properties field.
3. Expand the hierarchy of items as necessary.
4. Select the desired item.
5. Click **Select**.
6. Click **Save** on the Activity Properties page.

### 4.2.3 Activity Properties

After adding an activity to a knowledge path, you can set its properties. Setting activity properties is identical for the root activity and all sub-activities. If the activity is linked to content that originated from a source other than the Developer, only the Subject section appears, containing the Required, Play Modes and Show Outline options, and the Hyperlink field.

#### General

- **Name:** The name of the activity. This appears on the Activity List page.

#### Subject

- **Title Properties:** The name of the content that is linked to the activity.
- **Required:** When the Required field is enabled, users must complete the subject or assessment before taking the next subject or assessment in the activity. With this option enabled, users cannot view the next subject or assessment until the current item is completed. If this option is disabled, users can access the next subject or assessment before the current item is completed.
- **Allow Personalized Content:** When this option is available and enabled, users can choose between taking the full content or personalized content. Personalized content is a subject customized for a user based on his/her assessment results. After taking an assessment, users are presented with the personalized content option. Users see how they scored in all major sections of the subject and based on those scores, certain sections can be excluded from the personalized content.
- **Suppress subject (assess only):** The Suppress subject (assess only) option is not available until you select a pre- and/or post-assessment for the subject. However, this option is available if the content object selected for the subject has a default pre- and/or post-assessment set for it. In this situation, the default pre- and/or post-assessments are included in the knowledge path when the content object is selected.

When this option is enabled, the activity consists of assessments only. You can use this feature when you need an activity with assessments only, such as an accreditation exam.

- **Play Modes:** The Play Modes option allows you to select the way users navigate the subject. In Explorer mode, users can move around the subject outline at random, accessing any part of the outline at any time. In Sequenced mode, users must progress through the outline in the order in which it is presented.
- **Show Outline:** The Show Outline option is available when Sequenced mode is selected. When this option is enabled, users can access the subject outline while taking the subject in Sequenced mode. While users can see the entire subject outline, they still must move through the subject in order. If you disable this option, users cannot access the outline as they progress through the subject in Sequenced mode. When Explorer mode is selected, this option is automatically enabled and cannot be disabled.
- **Remediation Modes:** The Remediation Modes list provides you with choices for the type of feedback users receive when answering questions in a subject. Content in subjects can include questions, similar to those found in assessments. Questions appearing in subjects are specific to the section in which the user is working. Subject questions provide a way for users to check their understanding of the subject content. In a subject, users are always informed as to whether their responses are correct or incorrect. The Remediation Modes property determines when and how additional information is presented. These are the choices for remediation:

**Results Only:** The feedback displays the word "Correct" or "Incorrect" only.

**User Asks:** This is the default. The feedback displays the word "Correct" or "Incorrect," along with a Show Answer link. When this link is clicked, the correct answer and/or any remediation text appears in the feedback.

**Incorrect:** If the user's response is incorrect, the feedback window displays the correct answer and remediation text that explains why the correct answer is correct. If the user's response is correct, the word "Correct" appears in the feedback window.

**Always:** Whether the user's answer is correct or incorrect, the feedback displays the correct answer and remediation text explaining why the correct answer is correct.

**As Authored:** Use the remediation setting that was defined in the Developer.

- **Hyperlink:** You can launch the subject directly using the hyperlink in this field. The login page appears, if necessary, and you must login. If you try to access a subject for which you are not enrolled, or for which direct launch is not allowed, a message appears in the subject interface saying that you are not authorized to access the content. The URL can be sent to users to allow them to launch the subject, eliminating the need for creating a knowledge path and enrolling users. Note that any title imported from a source other than the Developer displays a not authorized message, as direct title launch is not allowed for this type of title.

## SmartHelp

Titles imported from Developer can also be used as source content for SmartHelp. SmartHelp is a sidebar that can be opened in a browser which lists applicable help topics for the page that is open in the browser.

Like user groups, you can create groups for SmartHelp sources. If a user subscribes to a SmartHelp group, they are subscribed to all the content sources in the group automatically. Knowledge Center uses the activity hierarchy of knowledge paths to administer SmartHelp groups. For more information about creating SmartHelp groups, see the *In-Application Support* guide. You can access this guide from Manager by pointing to More and then Reference

- **SmartHelp Availability:** Indicates whether the activity is a valid item for SmartHelp.

- **Public CDD URL:** The link to the location where a user can subscribe to the SmartHelp source. This option is read only.

**Note:** For more information about SmartHelp, see the *In-Application Support* guide. You can access this guide from Manager by pointing to More and then Reference.

## Pre-assessment

- **Assessment:** The Assessment list enables you to choose which assessment is used for the pre-assessment and/or post-assessment. This list displays all related assessments available for the content object that was selected for the Subject. If the selected content object has a default pre- and/or post-assessment set for it, the assessment is selected automatically.
- **Required:** When the Required field is enabled, users must complete the subject or assessment before taking the next subject or assessment in the activity. With this option enabled, users cannot view the next subject or assessment until the current item is completed. If this option is disabled, users can access the next subject or assessment before the current item is completed.
- **Allow place-out score and Place-out score:** This option is only available when the Required option is selected. When the Allow Place-out Score option is enabled, a user does not have to view the content in the activity if they achieve a score greater than that specified in the Place-out score field. Note that the score specified is a percentage; for example, a score of 75 means that the user must answer 75 percent of the questions in the assessment correctly to place out.
- **Remediation Enabled:** When this option is selected, users receive feedback on their responses to questions. The type of feedback is determined by the option selected in the Remediation Modes list. The options available in the Remediation Modes list are Results Only, User Asks, Incorrect, and Always.

If this option is disabled, users receive no feedback and advance to the next question as soon as the current question is answered. Even if remediation text is available, it is not displayed when this option is disabled.

- **Link Subject:** The Link Subject option is only available when remediation is enabled. When the Link subject option is enabled, users can link to the subject in addition to viewing the remediation provided. In the feedback, users see a Link to Subject button. When clicked, a new window opens and displays the section containing the relevant material. If this option is disabled, the Link to Subject button is not available in the feedback.
- **Summary:** When the Summary option is enabled, users see an Assessment Summary page after they complete an assessment. This page displays the assessment results, which include the number of questions in the assessment and of those, the number correct, along with the user's score as a percentage. This page also displays a breakdown of each major section in the subject and the user's score for each. It also displays a list of the questions answered correctly and incorrectly. Users can print this page as well as return to it at any time from within Knowledge Center.

If the personalized content feature is enabled, the Summary option is automatically selected and cannot be deselected. The Summary option is automatically enabled as the Assessment Summary page enables a user to configure his/her personalized content. When the personalized content feature is enabled, checkboxes appear to the left of each section listed, enabling a user to choose which sections appear in the personalized content. Depending on the options set for required scores, the user may not be able to deselect some of the checkboxes.

If the Summary option is disabled, the Assessment Summary page does not appear

upon completion of an assessment, nor can a user access it later.

- **Random question order:** When the Random Question Order option is enabled, the assessment questions are presented to a user in a different order each time he/she takes an assessment. If this option is disabled, questions are presented in the order in which they were created in Developer.
- **Random answer order:** When the Random Answer Order option is enabled, answers to multiple choice questions are provided in random order. The answers appear in a different order each time the question is presented. For multiple choice (single answer) questions that include All of the above and/or None of the above, these answers remain in their positions at the bottom of the list of choices. If this option is disabled, answers are presented in the order in which they were created in Developer.
- **Question Limit:** When the Question Limit option is blank, all questions in an assessment are displayed to the user taking the assessment. If a question limit is set, only that many questions are displayed to the user. The questions are selected randomly each time a user takes the assessment. The value in the field defaults from the value set for the assessment in Developer, but it can be overridden.

If the property is empty or the value is higher than the number of questions, all the questions in the assessment are displayed. If an invalid value is entered, such as 0, the property reverts to the previous value.

## Post-assessment

- **Assessment:** The Assessment list enables you to choose which assessment is used for the pre-assessment and/or post-assessment. This list displays all related assessments available for the content object that was selected for the Subject. If the selected content object has a default pre- and/or post-assessment set for it, the assessment is selected automatically.
- **Required and Required Score:** When the Required field is enabled, users must complete the subject or assessment before taking the next subject or assessment in the activity. With this option enabled, users cannot view the next subject or assessment until the current item is completed. If this option is disabled, users can access the next subject or assessment before the current item is completed. If a Required score is specified, a user must achieve that score to pass the assessment and move to the next activity. Note that the score specified is a percentage; for example, a score of 75 means that the user must answer 75 percent of the questions in the assessment correctly to pass.
- **Remediation Enabled:** When this option is selected, users receive feedback on their responses to questions. The type of feedback is determined by the selection in the Remediation Modes list. The options available in the Remediation Modes list are Results Only, User Asks, Incorrect, and Always.

If this option is disabled, users receive no feedback and advance to the next question as soon as the current question is answered. Even if remediation text is available, it is not displayed when this option is disabled.

- **Link Subject:** The Link Subject option is only available when remediation is enabled. When the Link Subject option is enabled, users can link to the subject in addition to viewing the remediation provided. In the feedback, users see a Link to Subject button. When clicked, a new window opens and displays the section containing the relevant material. If this option is disabled, the Link to Subject button is not available in the feedback.
- **Summary:** When the Summary option is enabled, users see an Assessment Summary page after they complete an assessment. This page displays the assessment results,

which include the number of questions in the assessment and of those, the number correct, along with the user's score as a percentage. This page also displays a breakdown of each major section in the subject and the user's score for each. It also displays a list of the questions answered correctly and incorrectly. Users can print this page as well as return to it at any time from within Knowledge Center.

If the personalized content feature is enabled, the Summary option is automatically selected and cannot be deselected. The Summary option is automatically enabled as the Assessment Summary page enables a user to configure his/her personalized content. When the personalized content feature is enabled, checkboxes appear to the left of each section listed, enabling a user to choose which sections appear in the personalized content. Depending on the options set for required scores, the user may not be able to deselect some of the checkboxes.

If the Summary option is disabled, the Assessment Summary page does not appear upon completion of an assessment, nor can a user access it later.


- **Random question order:** When the Random Question Order option is enabled, the assessment questions are presented to a user in a different order each time he/she takes an assessment. If this option is disabled, questions are presented in the order in which they were created in Developer.
- **Random answer order:** When the Random Answer Order option is enabled, answers to multiple choice questions are provided in random order. The answers appear in a different order each time the question is presented. For multiple choice (single answer) questions that include All of the above and/or None of the above, these answers remain in their positions at the bottom of the list of choices. If this option is disabled, answers are presented in the order in which they were created in Developer.
- **Question Limit:** When the Question Limit option is blank, all questions in an assessment are displayed to the user taking the assessment. If a question limit is set, only that many questions are displayed to the user. The questions are selected randomly each time a user takes the assessment. The value in the field defaults from the value set for the assessment in Developer, but it can be overridden.


If the property is empty or the value is higher than the number of questions, all the questions in the assessment are displayed. If an invalid value is entered, such as 0, the property reverts to the previous value.


#### 4.2.4 Edit/Delete an Activity


After creating an activity, you may need to change its properties at a later time. If you have activities that you no longer need, you can delete them. Deleting activities deletes them from the server. It also deletes any assignments of the activity to users and user groups, as well as any record of users taking that particular activity. In addition, deleting an activity deletes all its sub-activities. You cannot delete the root activity in a knowledge path.



Users see changes to a knowledge path the next time they return to the Subject Selection page.

 To edit an activity:

1. Display the Knowledge Path Management page.
2. Use Search or scroll if necessary to locate the knowledge path with the activity you want to edit.
3. Click  in the **Edit** column for the knowledge path.
4. Click the **Activities** link.

5. Click  in the **Edit** column for the activity you want to edit.
6. Change the activity properties as desired.
7. Click **Save**.
8. Click **Back to Activities** to go back to the list of activities in the knowledge path, if desired.

 To delete an activity:


1. Display the Knowledge Path Management page.
2. Use Search or scroll if necessary to locate the knowledge path with the activity you want to delete.
3. Click  in the **Edit** column for the knowledge path.
4. Click the **Activities** link.
5. Click  in the **Delete** column for the activity you want to delete.
6. Click **OK** to confirm the deletion.

#### 4.2.5 Move Activities

You can move an activity from one parent to another in the knowledge path or up or down within the same parent. When you move an activity, the tracking data for that activity is not affected; for example, if the user has already taken the assessment for an activity, and you move it to another position in the knowledge path, the tracking data still shows that the user has taken the assessment.

You can use drag-and-drop or cut-and-paste to move an activity to a different location. When you drag-and-drop or paste, the activity is placed as the last child of the selected activity. If the activity you are moving has child activities, the child activities are moved with the parent. To move child activities up and down within a parent activity (for example, changing the order) you must use the Move commands in the More or shortcut menus.




 To move an activity to another location using drag-and-drop:


1. Display the Knowledge Path Management page.
2. Use Search or scroll if necessary to locate the knowledge path with the activity you want to edit.
3. Click  in the **Edit** column for the knowledge path.
4. Click the **Activities** link.
5. Click and drag the activity to the new location.
6. Release the mouse button when the new location is highlighted.



 To move an activity to another location using cut and paste:

1. Display the Knowledge Path Management page.



2. Use Search or scroll if necessary to locate the knowledge path with the activity you want to edit.
3. Click  in the **Edit** column for the knowledge path.
4. Click the **Activities** link.
5. Click  in the **More** column for the activity you want to move.
- or  
Right-click the activity.
6. Click **Cut** on the shortcut menu.
7. Click **OK**.
8. Click  in the **More** column for the activity where you want to place the activity you are moving.
- or  
Right-click the activity in the target location.
9. Click **Paste** on the shortcut menu.


 To move (reorder) an activity in the same location:


1. Display the Knowledge Path Management page.
2. Use Search or scroll if necessary to locate the knowledge path with the activity you want to edit.
3. Click  in the **Edit** column for the knowledge path.
4. Click the **Activities** link.
5. Click  in the **More** column for the activity you want to move.
- or  
Right-click the activity.
6. Click **Move Up** or **Move Down** on the shortcut menu.


#### 4.2.6 Copy Activities




You can copy an activity in the knowledge path. When you copy an activity, the activity properties are copied but the tracking data is not. In addition, an underscore and a number is appended to the name; for example, the copy of an activity named Printing Documents is Printing Documents\_1.

You can use drag-and-drop while pressing CTRL to copy an activity, as well as the commands on the More and shortcut menus. When you drag-and-drop or paste, the activity is placed as the last child of the selected activity. If the activity you are copying has child activities, the child activities are copied with the parent.

 To copy an activity to another location using drag-and-drop:

1. Display the Knowledge Path Management page.
2. Use Search or scroll if necessary to locate the knowledge path with the activity you want to edit.
3. Click  in the **Edit** column for the knowledge path.
4. Click the **Activities** link.
5. Press **CTRL** and drag the activity to the new location.
6. Release the mouse button when the new location is highlighted.


 To copy an activity to another location using copy and paste:

1. Display the Knowledge Path Management page.
2. Use Search or scroll if necessary to locate the knowledge path with the activity you want to edit.
3. Click  in the **Edit** column for the knowledge path.
4. Click the **Activities** link.
5. Click  in the **More** column for the activity you want to copy.  
or  
Right-click the activity.
6. Click **Copy** on the shortcut menu.
7. Click **OK**.
8. Click  in the **More** column for the activity where you want to place the activity you are copying.  
or  
Right-click the activity in the target location.
9. Click **Paste** on the shortcut menu.


#### 4.2.7 Enroll Multiple User Groups in a Knowledge Path

After you have created a knowledge path, you can enroll multiple user groups in it on the User Group Enrollment subpage. In the Enrolled column, a check indicates that the user group is enrolled in the path. The Start Date and End Date columns allow you to put date restrictions on access to the path. If you enter dates other than the defaults, the users in the group are only able to access the path between those dates. Start and end dates only apply to knowledge paths in which self-enroll is disabled.

The checkboxes to the left of the user group name allow you to select multiple groups and use the Enroll and Unenroll options. You can also use the Select options to select multiple groups.

 To enroll or unenroll user groups in a knowledge path:

1. Display the Knowledge Path Management page.

2. Use Search or scroll if necessary to locate the knowledge path.
3. Click  in the **Edit** column for the knowledge path.
4. Click the **User Group Enrollment** link.
5. Use **search**, sort the list, or scroll the list of user groups as necessary.
6. Select the checkbox in the **Enrolled** column to enroll a user group in the path, or deselect the checkbox to unenroll it.

or


Use the Select options to select paths and click **Enroll** or **Unenroll**.


7. If self-enroll is disabled for the knowledge path, enter start and end dates as desired.

#### 4.2.8 Enroll Multiple Users in a Knowledge Path

After you have created a knowledge path, you can enroll multiple users in it on the User Enrollment subpage. There are several columns which tell you whether the user is enrolled in the knowledge path, and if so, what type of enrollment. In the User group Enrolled column, a check indicates that the user is enrolled in the path as part of a user group. In the Self Enrolled column, a check indicates that the user has enrolled themselves in the path. The Admin Enrolled allows an Admin or a Manager to enroll the user in the path and add Start Date and End Date restrictions on access to the path. If you enter dates other than the defaults, the user is only be able to access the path between those dates.

The checkboxes to the left of the path name allow you to select multiple users and use the Enroll and Unenroll options. You can also use the Select options to select multiple users.

 To enroll or unenroll users in a knowledge path:

1. Display the Knowledge Path Management page.
2. Use Search or scroll to locate the path.
3. Click  in the **Edit** column for the knowledge path.
4. Click the **User Enrollment** link.
5. Use **search**, sort the list, or scroll the list of users as necessary.
6. Select the checkbox in the desired enrollment type column to enroll the user in the knowledge path, or deselect the checkbox to unenroll them.


or

Use the Select options to select the user groups and click **Enroll** or **Unenroll**.

7. Enter start and end date as appropriate.

#### 4.3 Change the Sort Order

On the Knowledge Paths page, there is a Sort Order column. By default, the knowledge paths are listed in the order in which you create them, and the numbers in the Sort Order column are assigned in sequential order. This is the order in which the knowledge paths are listed in each category on the Knowledge Paths page in the Knowledge Center. You can change this order.

 To change the sort order of knowledge paths:

1. Display the Knowledge Path Management page.
2. Click the **Edit Sort Order** link.
3. On the Knowledge Path Sort Order List Management page, drag the knowledge paths to the desired order.

---

## 5 Manage Titles

A title consists of an outline with content, including any questions or assessments. Titles can be imported from the Developer or from external sources.

The Title Management page lists the titles with the date and time when the title was installed or last updated, and whether the title is from the Developer or an external source. For a Developer title, the Update Date Time column shows the date and time that the title was imported or last updated, since Developer titles are updated when they are re-imported. For an external title, it shows when the title was imported. Since external titles are not updated when they are re-imported, this column tells you which is the most recent title.

You can click any of the underlined column headings to sort the list by that column. In addition, you can use the search field at the top to locate a specific title. The Show Identifiers option at the bottom of the list displays the unique identifiers for each item in the list.

System Administrator or Manager permissions on the server allow you to import titles as well as change the properties of an existing title.

**Note:** If more than one workgroup exists, the list only includes the titles for the selected workgroup.

### 5.1 Import a Title

You can import a title that was created in the Developer or any tool that builds SCORM 2004 3rd Edition content.

If you have created content in the Developer, there are two methods you can use to import it. One way is to publish the content directly to the Knowledge Center server during the publishing process; for more information, see *Player and LMS* in the *Deployment Formats* section in the Publish Content chapter of the Content Development guide. The other way is to import a published Player package. The package must be zipped, with the kp.html file at the root of the zip file.

If you import a Player package with Test It! mode included, [Test] is appended to the title of the outline in Knowledge Center to differentiate it from regular packages. Data generated from playing a [Test] title is tracked, and you can run a summary report to obtain the results.

**Note:** You cannot import titles if you are using an iPad.

If you have built SCORM content with another tool, the content should be exported and zipped, with the imsmanifest.xml file at the root of the zip file. Note that, once imported, this content can only be played through a knowledge path; it is not available through the Player link in Knowledge Center.

**Note:** Importing SCORM content is available in the Professional Edition only.


 To import a title:

1. Display the Title Management page.
2. Click **Import Title**.
3. Click **Browse** and navigate to the location of the zipped package. The location can be anywhere on a network or local drive of your computer.
4. Click **Import**.

If you cannot import the package this way because the upload fails, the workaround is to transfer the package to the Knowledge Center server's file system and import from there. This feature must be enabled by adding the

```
<add key="AllowImportFromServer" value="true" />
```

entry to the web.config.

 To import a title from the server's file system:

1. Create a directory in the KContent folder and unzip the package into that directory.
2. Display the Title Management page.
3. Click **Import Title**.
4. Check the **Import content from server side file** checkbox.
5. Enter the name of the directory you unzipped the package into under KContent.
6. Click **Import**.
7. After the package has been successfully loaded, follow the instructions on the completion page to rename the player package folder in content root to the actual package id.

## 5.2 Title Properties (available only in the Professional edition)

A title has the following properties:

### General

- **Name:** Displays the name of the title. You cannot change the name of a title.
- **Owner:** Only appears if multiple workgroups are enabled. Displays the name of workgroup which owns the title. Changing this to a different workgroup affects the list of titles on the Title Management page.
- **Workgroups:** This option only appears if multiple workgroups have been enabled on the server. It indicates which workgroups can use the title in a knowledge path. By default, the owner workgroup can use the title, but if you have multiple workgroups, you can make it available to them as well. Workgroups not given access to a title are not able to use it when creating knowledge path activities.

### Title Launch

Titles can be launched directly from the server using the Player link in the Knowledge Center or placed in a knowledge path and launched from the Knowledge Paths link. Note that the options in this category are not available for external titles.

- **Allow Title to Be Launched Directly:** This option allows a title to be launched directly or launched from a knowledge path.
- **Secure Title to Specific User Groups:** This option allows only users who belong to specified user groups to launch titles directly.
- **Do Not Allow Title to Be Launched Directly:** This option means that the title must be launched from a knowledge path.

- **Title Direct Launch URL:** The URL in this field can be used to launch the title from the content root without using the Knowledge Center.

### Experts

Lists users designated as experts, if Expert Advice is enabled on the server. Expert Advice enables users to communicate with subject matter experts as they take subjects. You can select experts to be available for each title.

### Feedback Monitors

Lists users designated as feedback monitors, if feedback monitors are enabled. Feedback allows users to communicate with authors with suggestions or comments about the content. You can select or deselect monitors for each title.

### SmartHelp


Titles imported from Developer can also be used as source content for SmartHelp. SmartHelp is a sidebar that can be opened in a browser which lists applicable help topics for the page that is open in the browser.

- **Enable SmartHelp:** Select this option to allow the title to be used as a SmartHelp source.
- **Public CDD URL:** The link to the location where a user can subscribe to the SmartHelp source. This option is read only.

**Note:** For more information about SmartHelp, see the *In-Application Support* guide. You can access this guide from Manager by pointing to More and then Reference.

If you have imported content from a tool other than Developer, only the Name, Experts, and Feedback Monitors properties are available. These properties apply to the entire title, not any individual organizations within the title.

 To edit title properties:

1. Display the Title Management page.
2. Click  in the **Edit** column for the title you want to edit.
3. Edit the properties as desired.
4. Click **Save**.

## 5.3 Re-Import a Title

You can re-import any title at any time. If the title was imported from the Developer, re-importing it updates it with any changes. If the title was imported from another tool, re-importing it creates a new title; it does not update the existing one. The Update Date Time column displays the date on which the title was imported. After you have re-imported the title, you can then easily delete the old title. Be aware that all tracking data for the old title is also deleted.

**Note:** The SCORM specifications specify that object IDs must be unique within a single package. It is likely that two packages could contain duplicate IDs for two different learning objects. It is for this reason that re-importing a title from another tool creates a new title rather than risking the possibility that content would be overwritten.

To re-import a title, use the **Import Title** button on the Title Management page and import it again. See *Import a Title* for more information.

## 5.4 Considerations for SCORM-Compliant Titles

In addition to content created with Developer, Knowledge Center can import and host most content created to SCORM 2004 specifications by other tools. Such content is referred to as "external content" or "3rd party content." Knowledge Center uses SCORM 2004 RTE semantics to communicate with learning objects (SCOs). While Knowledge Center does support the SCORM 2004 API as well as the Run-Time Environment Data Model (see specifics on conformance below), it does not support the Sequencing and Navigation functionality of SCORM 2004. For external content to operate correctly when hosted in Knowledge Center, it must be written to function correctly in the absence of this functionality. In particular, if completion and scoring information is to be properly recorded, the SCO must send this information to Knowledge Center directly rather than relying on setting the completion and scoring information of its primary objective.

### Conformance With the Run-Time Environment Data Model

Below is a list of each of the data model elements and level of support in the Knowledge Center

- `cmi.comments_from_learner`

Knowledge Center includes a more versatile mentoring and feedback facility that allows for two-way conversations. Therefore it makes no use of comments submitted through the `cmi.comments_from_learner` data model element. However, any user comments written by a SCO will be saved and be available for retrieval by the SCO throughout the current attempt.

- `cmi.comments_from_lms`

Knowledge Center does not support this functionality outside of its mentoring and feedback facility. Therefore, the `cmi.comments_from_lms` array are always empty, and a `get` on `cmi.comments_from_lms._count` returns 0.

- `cmi.completion_status`

May be set either directly through setting the value of `cmi.completion_status` or indirectly through setting `cmi.progress_measure`.

- `cmi.completion_threshold`

Set in manifest file. Allows the Knowledge Center to set `cmi.completion_status` based on setting of `cmi.progress_measure`.

- `cmi.credit`

Always returns "credit".

- `cmi.entry`

Returns "resume" if resuming a suspended attempt. Otherwise returns "ab-initio".

- `cmi.exit`

Accepts all vocabulary tokens, but all values other than "suspend" are handled as normal session end. Logging out is handled through the Knowledge Center user interface and there is no special support for timeout.

- `cmi.interactions`

Supported, however, since Sequencing and Navigation is not supported, interaction objective id's do not map to anything. The SCO is still free to use interaction



objectives for its own internal use.

- cmi.launch\_data

Supported.

- cmi.learner\_id

Supported.

- cmi.learner\_name

Supported.

- cmi.learner\_preference

Knowledge Center does not use user preferences and has no mechanism to set these preferences outside of the RTE. Therefore, user preferences initially return their default values. These may be set by the SCO and are maintained for the duration of the attempt, but when the attempt ends they revert to their defaults.

- cmi.location

Supported.

- cmi.max\_time\_allowed

Set in manifest file. Knowledge Center does not support any special time-out condition, so if the SCO supports time-out and sets cmi.exit to "time-out", this is no different from setting cmi.exit to "normal".

- cmi.mode

Always returns "normal".

- cmi.objectives

Available for use by the SCO. However, since Sequencing and Navigation is not supported, objective id's do not map to anything and the array is initially empty. Setting the success status or score of an objective has no external effect. The SCO is still free to use the objectives array for its own internal use.

- cmi.progress\_measure

If set, in combination with a specified value of cmi.completion\_threshold, Knowledge Center overrides any explicit setting of cmi.completion\_status and evaluates completion status on its own.

- cmi.scaled\_passing\_score

Part of Sequencing and Navigation and not supported.

- cmi.score

Supported.

- cmi.session\_time

Supported.

- cmi.success\_status

Supported. Since Sequencing and Navigation is not supported, cmi.success\_status must be set explicitly, rather than through objectives or cmi.scaled\_passing\_score.

- cmi.suspend\_data

Supported.

- cmi.time\_limit\_action

Set in manifest file. Knowledge Center does not support any special time-out condition, so if the SCO supports time-out and sets cmi.exit to "time-out", this is no different from setting cmi.exit to "normal".

- cmi.total\_time

Supported.

## 6 Manage Custom User Fields (available only in the Professional edition)

User accounts have a default set of fields, such as First Name, Last Name, and Username. If you have Administrator permission, you can add custom user fields to record additional user information. Custom user fields are added at the server level. Therefore, if you are working in a multiple workgroup environment, these fields appear in all user accounts, regardless of workgroup.

Every custom field must have a name; this name appears as a field label in the New User dialog box. The name can be any alphanumeric string up to 50 characters in length.

 To display the Custom User Field Management page:

1. In the Manager, point to **More**.
2. Click **Custom User Fields**.

### 6.1 Field Types and Options

There are seven possible data types for custom user fields. You use the Type list to choose the data type.

- **Text:** The input can be any string of characters. A blank field appears in the dialog box. The minimum and maximum length of the entry can be specified.
- **Numeric:** The input must be a number. A blank field appears in the dialog box. If anything other than numeric characters is entered, the user is notified and the input is not saved.
- **Date Time:** The input must be a date and/or a time. A blank field appears in the dialog box. Dates can be typed in numeric format, or in a format such as December 20, 2011, which is automatically converted when entered. You can also select a date from the calendar that appears when you click the field. Time must be entered using a colon to separate hours and minutes. As long as one digit follows the colon, the time is saved (using zeros in place of any omitted digits). For invalid input, the user is notified and the input is not saved.
- **Boolean:** The input can be True or False. A list displays the choices True and False in the dialog box. By default, a Boolean field displays (None).
- **Large Text:** The input is a large amount of text in which a manager or user can type notes or other information (for example, a job description) about an account.
- **Single Select List:** Provides a list of options from which one option can be selected. Once created, a list automatically appears when the field is selected. An additional option of (None) is automatically included when the list is displayed.
- **Unordered List:** Provides a list from which multiple options can be selected. The options appear in a list and end users can use CTRL to select multiple options.


For each field type, one or more of the following options may appear.

- **Value Required:** Marks a custom field as required and a red asterisk appears next to the field name on the User Properties page. This requires a manager or user to enter data in the field, or the record is not saved.

- **User Can View Value:** Enables a user to view a custom user field in the Knowledge Center. If the User Can Modify Value option is also enabled, the user can also modify the entry in the field. If this option is disabled, the custom field does not appear in the Knowledge Center, and the User Can Modify Value option is disabled automatically.
- **User Can Modify Value:** Enables a user to modify a custom user field in the Knowledge Center. This field can only be selected when the User Can View Value option is enabled. If this option is disabled, a user can view the information in the field, which was typed in Manager, as long as the User Can View Value option is enabled, but cannot modify it.
- **Minimum length of value:** Specify the minimum length of the text typed into a text field. If the Minimum length of value option is disabled, there is no minimum length required on the entry.
- **Maximum length of value:** Specify the maximum length of the text typed into a text field. If the Maximum length of value option is disabled, the entry can be a maximum of 255 characters.
- **Pick List:** Create a list of choices for Single Select List and Unordered List field types.

 To create a text, numeric, date/time, Boolean, or large text field:

1. Display the Custom User Field Management page.
2. Click **Create Custom User Field**.
3. Type the name of the new field.
4. Select the desired data type from the **Type** list.
5. Set the field options by selecting/deselecting options or typing field lengths as desired.
6. Click **Save**.

 To create a single select list or unordered list field:


1. Display the Custom User Field Management page.
2. Click **Create Custom User Field**.
3. Type the name of the new field.
4. Select the **Single Select List** or **Unordered List** data type from the **Type** list.
5. Set the field options by selecting/deselecting options as desired.
6. In the Pick List, click in the first row in the **Name** column.
7. Type the first list option.
8. Press **ENTER** or click below the pick list to display a blank row.
9. Continue adding values until the list is complete.
10. Click **Save**.


## 6.2 Edit/Delete Custom User Fields


When you edit a custom user field, all existing entries are impacted by the changes. If you make an existing field required and it is not complete in an existing account, a user or manager updating account information is prompted to complete the field at that time.

You can delete custom user fields you no longer need. When you delete a custom user field, it is deleted from each user account.

 To edit a custom user field:

1. Display the Custom User Field Management page.
2. Click  in the **Edit** column for the field you want to edit.
3. Edit properties as desired.
4. Click **Save**.

 To delete a custom user field:

1. Display the Custom User Field Management page.
2. Click  in the **Delete** column for the field you want to delete.
3. Click **OK** to confirm the deletion.

## 7 Use Knowledge Path Categories (available only in the Professional edition)

Knowledge Paths can be grouped into categories. Categories allow the presentation of related knowledge paths in an organized manner to users on the Knowledge Paths page. While it is not required that you organize knowledge paths by category, it is a good idea to do so and is particularly useful if you have a large number of knowledge paths.

You can place a knowledge path in a category at creation or at a later time. Knowledge Paths not placed in a category appear below the General heading.

 To display the Knowledge Path Categories Management page:

1. In the Manager, point to **More**.
2. Click **Path Category**.

### 7.1 Create a Knowledge Path Category

To create a knowledge path category, you simply need to give it a name. The name should be descriptive so that the users understand the category.

 To create a knowledge path category:

1. Display the Knowledge Path Categories Management page.
2. Click **Create Category**.
3. Enter a name for the category.
4. Click **Save** or press **ENTER**.

### 7.2 Edit/Delete a Category


You can edit the name of a knowledge path category as necessary. Users see the change the next time they access the Knowledge Paths page.

If a category is no longer useful, you can delete it. When you delete a knowledge path category assigned to a knowledge path, the knowledge path is put in the General category, which is the default category.

 To edit a knowledge path category:

1. Display the Knowledge Path Categories Management page.
2. Click the name of the category you want to edit.
3. Edit the name as desired.
4. Click **Save** or press **ENTER**.

 To delete a knowledge path category:

1. Display the Knowledge Path Categories Management page.
2. Click  in the **Delete** column for the path category you want to delete.

3. Click **OK** to confirm the deletion.

## 8 Use Workgroups (available only in the Professional edition)


A workgroup is an organizational group of users. Workgroups contain individual user accounts, user groups, and knowledge paths. Workgroups are designed to correspond with independently managed corporate sites or divisions.

In a default installation, there is only one workgroup, although you can enable multiple workgroups on the server. If you enable multiple workgroups, be aware that information such as users, user groups, and knowledge paths cannot be shared between workgroups. In addition, reports cannot be run across multiple workgroups, but only one workgroup at a time.

You access the Workgroups page in Manager through the More list. If multiple workgroups are not enabled, the Workgroups page displays the properties for the default workgroup. If multiple workgroups are enabled, the Workgroups page displays the list of available workgroups. The Workgroups page automatically closes when you click on the Users, User groups, Knowledge Paths, or Titles page, or access the More list to open another page.

**Note:** For information about enabling multiple workgroups on the server, see *Enable Multiple Workgroups* later in this section.

If you enable multiple workgroups on the server and create more than one workgroup, a workgroup option appears on many pages, such as Users, User Groups, Knowledge Paths, Titles, and Path Categories. The option limits the list to the items that belong to a particular workgroup. In addition, any users with Manager rights can only see the information for the workgroup to which they belong.

 To display the Workgroup Properties page (single workgroup) or the Workgroup Management page (multiple workgroups):

1. In the Manager, point to **More**.
2. Click **Workgroups**.

### 8.1 Create a Workgroup

The Master workgroup is created by default at installation. Depending upon your particular organization, the Master workgroup is probably the only workgroup you need. If you choose to create multiple workgroups, be aware that you cannot share information, such as user accounts and knowledge paths, between workgroups. However, titles can be shared between workgroups. If desired, you can create user groups within a workgroup to organize users and manage enrollment.

#### 8.1.1 Workgroup Properties

You can set the following properties for a workgroup.

##### General

- **Name:** The name can be any alphanumeric string up to 50 characters in length.
- **User has permission to self enroll:** When this option is enabled, users in the workgroup can enroll in or withdraw from knowledge paths available for self-enrollment. When it is disabled, users cannot self enroll in any knowledge paths; the manager must enroll all users in the available knowledge paths. In addition, users do not see the Enroll or Withdraw from Knowledge Paths link in the Knowledge Center when this option is disabled. If you disable this option at the workgroup level and



knowledge paths exist with the Self enroll option enabled, the Self enroll option is disabled for those paths.

## Username Generation

- **Generate usernames automatically using this pattern:** When this option is enabled, usernames are generated using the information in the fields below.
- **Number of characters from first name:** The number of characters from the first name that should be used in the username.
- **Number of characters from last name:** The number of characters from the last name that should be used in the username.
- **Pattern Order:** Select whether you want the first or last name to be first in the username.
- **Choose from the standard patterns:** You can choose one of these standard patterns:

F(4)L(4): The first four characters of the first name and the first four characters of the last name.

L(4)F(4): The first four characters of the last name and the first four characters of the first name.

L(8): The first eight characters of the last name.

F(\*): All of the characters of the first name.

### 8.1.2 Username Patterns

If you choose to generate usernames automatically, you can create a custom pattern or select a standard pattern.

#### Custom Pattern

You can create a custom username pattern by specifying the number of characters from the first and/or last names in the Number of Characters from First Name and Number of Characters from Last Name fields. If you want to use all characters in the first or last name, you can type an asterisk (\*) in the appropriate field. After indicating the number of characters to use, you can indicate if the first or last name appears first in the username by choosing the First Name First or Last Name First option.

#### Standard Patterns

The Standard Patterns list includes four predefined patterns, represented by a code. The number in parentheses following the letter F in the code refers to the number of characters that should be used from the user's first name. The number in parentheses following the letter L in the code refers to the number of characters that should be used from the user's last name. If a name has fewer characters than are specified in a username pattern, all characters are used.


There are four standard username patterns available. The usernames that each pattern would create for a user with the name Stephanie Morganstern are shown below:

- F(4)L(4)  
First four characters of first name, first four characters of last name  
StepMorg
- L(4)F(4)  
First four characters of last name, first four characters of first name  
MorgStep
- L(8)  
First eight characters of last name

Morganst

- F(\*)  
All characters in the first name, regardless of the number of letters in the first name  
Stephanie

If you use a set username pattern, you should determine how to handle duplicate usernames. For example, if you use the first character in the first name and all characters in the last name, you could have two BSmith usernames (for example, Barbara Smith and Bruce Smith). In this situation, you could add a number at the end of one of the user's last names to have BSmith and BSmith1.


 To create a new workgroup:


1. Display the Workgroup Management page.
2. Click **Create Workgroup**.
3. Enter a name for the workgroup.
4. Select the **User has permission to self-enroll** option, if desired.
5. Select the **Generate usernames automatically using this pattern** option, if desired.
6. If you choose to generate usernames automatically, select a standard pattern, or indicate the number of characters to use from the first and last names and select a pattern order.
7. Click **Save**.


## 8.2 Edit/Delete a Workgroup


You can edit the name of a workgroup, as well as change enrollment settings and a username pattern. Changes made to the workgroup properties affect all user accounts created after the changes are made. Therefore, if you set a username pattern, only new accounts are impacted.

You can delete a workgroup you no longer need. However, when deleting a workgroup it is important to remember that all items in the workgroup are deleted and all tracking data is lost.

 To edit a workgroup:


1. Display the Workgroup Properties page.
2. Click  in the **Edit** column for the workgroup you want to edit.

 To delete a workgroup:

1. Display the Workgroup Properties page.
2. Click  in the **Delete** column for the workgroup you want to delete.

## 8.3 Enable Multiple Workgroups

If you want to create multiple workgroups, you must first enable the display of multiple workgroups. You do this by changing a variable in the web.config file for Knowledge Center on the server.

 To enable the display of multiple workgroups:

1. Navigate to the folder where Knowledge Center is installed on the server. In a default installation, this is \Program Files\User Productivity Kit\Knowledge Center\Web Server\KCenter.
2. Open the web.config file in any text editor.
3. In the <app settings> section, locate the DISPLAYWGROUPS key and change the value to true.

Example: `<add key="DISPLAYWGROUPS" value="true"/>`

4. Save and close the web.config file.

## 9 Manage the Knowledge Center Server

The Knowledge Center server is installed with a set of default properties and options. You can change these options to customize the setup to your needs.

 To display the Server Management page:

1. In the Manager, point to **More**.
2. Click **Server**.

### 9.1 Server Properties

#### General

- **Server Name:** You can label the server with a user-friendly name up to 50 characters in length. The server name appears in the login dialog box when you publish to Knowledge Center in the Developer and in the User Import Utility.
- **Server URL:** This displays the link used in publishing content from the Developer to Knowledge Center.
- **User count:** This field displays the total number of users created in all workgroups on the server.

#### Users Have Permission to

With the following options, you can control the links that appear in the Knowledge Center as well as some user permissions.

- **Create Accounts:** The New User option appears on the login page, allowing users to create their own accounts.
- **Modify profiles:** (available in Professional edition only): The User Profile link is available in the Knowledge Center, allowing users to change their first and last names, their email address, their password, and their default language.
- **Save Last Login:** The Save My Username and Password option appears on the login page, allowing users to select this option to bypass the login page the next time they log in.
- **Change their Password:** The User Profile link appears in the Knowledge Center, allowing users to change their passwords. It only affects existing accounts. If this option is disabled, passwords must be changed in Manager.
- **Have blank passwords:** Allows users to log in without a password. A password is not required when a user account is created.
- **Access help files** (available in Professional edition only): The Help link appears in the Knowledge Center. Allows users to access help; you may want to disable this option if the Knowledge Center is customized, to prevent users from being confused by inconsistent terminology.
- **Use Knowledge Paths** (available in Professional edition only): The Knowledge Paths link appears in the Knowledge Center, allowing users to access and enroll in Knowledge Paths.

- **Use Player:** The Player link appears in the Knowledge Center, allowing users to launch content directly in the Player without enrolling in Knowledge Paths.
- **Use Notebook** (available in Professional edition only): The Notebook link appears in the Knowledge Center. Users can take notes and bookmark sections as they work.
- **Use Search** (available in Professional edition only): The Search link appears on the Knowledge Center. Users can locate content containing the search criteria they specify. The Search options are available only when the Use Knowledge Paths link is selected.
- **Search all published content** (available in Professional edition only): By default, users can only search content in the Knowledge Paths in which they are enrolled. Select this option to allow users to search all of the published content on the server.

### Email Options

You can set up Knowledge Center so that when a user or expert posts an item in the Knowledge Center, the user or expert receives notification of the posting in an email message. Knowledge Center itself does not have the capability to send e-mails, so you must use the following options to set up a connection to the server:

- **Server E-mail:** The email address through which messages from the system are sent. Enter an email address for the server if you want the Forgot your password? link to appear on the login page, or if you want the server to send messages when questions and answers are posted in Expert Advice.

The sender of the email is the address typed in the Server email field. Therefore, if the Server email field contains administrator@xyz.com, users and experts receive messages from this address when questions and answers are posted. Likewise, if a user forgets his/her password, the user receives an email message from administrator@xyz.com containing a link to a page where his/her password can be changed.

- **SMTP Server Name:** The IP address or server name of the SMTP server. This can be either http: or https:. You can use any SMTP server, whether it is local or on the Internet.
- **Server Port:** The SMTP port number. The default is 25.
- **Username:** If you are using authenticated SMTP, enter a valid username for the SMTP server. If you are not using authenticated SMTP, this field can be blank.
- **Password:** If you are using authenticated SMTP, enter a valid password for the SMTP server. If you are not using authenticated SMTP, this field can be blank.
- **Enable SSL:** If you are using a secure web site (https:), choose this option.

### Miscellaneous Options

There are several general options you can set for the server. If you have the Standard version installed, be aware that the only available option is Enforce Minimum Password Length.

- **Forgot Password Link expiration days:** This option is only available if the server has an email address. You can use this option to limit the amount of time that the Forgot Your Password link is valid, when it is sent to a user.
- **Usernames must be Unique Across Workgroups:** This option is only available if you have enabled multiple workgroups on the server. Selecting this option forces the user name to be unique on the server.

- **Warn users of account expiration:** You can enable this option to display a message regarding account expiration in red text in the Welcome page in the Knowledge Center. You enter a number of days in the User Expiration Warning Days field. The account expiration message displays within a certain number of days of expiration. For example, if the number in the User Expiration Warning Days is 5, a user would receive a message five days before account expiration and each day until the account expires.
- **Enforce Minimum Password Length:** You can enable this option and then enter a number in the Minimum Password length field to require passwords to have at least a certain number of characters. When this feature is enabled, anyone creating or updating an account receives a warning message if the password does not meet the minimum.
- **Exit Session when User is Inactive:** You can enable this option to set a time limit (in whole minutes) for inactivity in the Knowledge Center Player. If a user is inactive for a longer period than specified in the Maximum Inactivity Time in minutes field, the user receives a message that they have exceeded the timeout.

**Note:** If you set a maximum inactivity value, and the user starts a topic playback from either a knowledge path or the Player launched from the Player link, the time is counted on a per frame basis. If the user spends more time on a frame than the inactivity limit, they are warned about time expiration. However, if the user plays a topic in See It! mode without pausing, and it takes longer than the inactivity time, they are not warned.

- **Subject Outline visible by default:** The Subject Outline visible by default option controls what a user sees the first time he or she accesses the Knowledge Center Player. When this option is enabled, users see a subject outline in the left pane. When this option is disabled, the first AU or section in the subject appears; users can then navigate the outline sequentially. In either situation, however, the user can hide or display the subject outline. The outline then remains displayed or hidden each time the user accesses the subject, until he or she changes the view again.
- **Default Language:** The language selected from the End User Default Language list determines the language in which the Knowledge Center appears.

## SmartHelp

Titles imported from Developer can also be used as source content for SmartHelp. SmartHelp is a sidebar that can be opened in a browser which lists applicable help topics for the page that is open in the browser. You can deploy and administer SmartHelp through Knowledge Center. Using these options, you can specify the location from which a user can install SmartHelp.

- **None:** SmartHelp cannot be installed through Knowledge Center.
- **Knowledge Center URL:** The location within the Knowledge Center installation from which a user can install SmartHelp.
- **Custom URL:** A location external to Knowledge Center from which a user can install SmartHelp.

**Note:** For more information about SmartHelp, see the *In-Application Support* guide. You can access this guide from Manager by pointing to More and then Reference.

## Content Root

The content root has two paths, a URL and a UNC location. The web path (URL) tells the web browser where to "point" to access content, while the network path (UNC) physically locates the content on a file system.

- **URL:** Location of content on a web server. This field is read-only.
- **Location:** The UNC path to the physical location of the content on the server. The UNC path can point to a machine other than the Knowledge Center server as long as

the virtual directory points to the remote location through the UNC path. Note that for search to function properly in Knowledge Center, the remote machine where the content root is located should be a Windows server with Windows search enabled. If the content root is not on a Windows server, Knowledge Center can still be used although Search does not work.

**Warning:** Use extreme caution when editing the content root location. If you edit it improperly, users are no longer able to access the content.

## 9.2 Purge Data

Purge allows you to permanently delete user activity data, including Ask an Expert and Feedback threads, as of a specified date. This also removes the data from the reports; some reports may show different cumulative data after the purge. Completion data is preserved; the purge process creates a rollup record that keeps the best score and the most recent completion data.

**Note:** Users with Expert or Feedback Monitor permissions for specific titles can delete (purge) individual conversations for those titles using the View Report link from the Review Feedback or Answer a Question pages. From the report, they can use the Delete Conversation link to permanently remove an entire conversation from the server.

**Warning!** Purge cannot be undone. Be sure you have a current backup of your database before purging the data.

- **Enter Purge Date:** All user activity from the date you specify and earlier is deleted.
- **Select Data:** Select the types of data you want to purge.
- **Select Users:** Select whether you want to purge data from active and/or inactive user records. The user records themselves are not deleted.

**Note:** The Select Data and Select Users options are only available in the Professional Edition.


 To purge data from the server:

1. Display the Server Management page.
2. Click the **Purge** link.
3. Click in the **Enter Purge Date** field and use the calendar picker to choose a date.
4. Select data and users options as desired.
5. Click the **Purge** button.
6. Click **Yes** to confirm the purge.

## 9.3 View Purge History

The Purge History page displays the records of all the purges performed on the database, sorted in reverse chronological order, with the most recent purge at the top. The record includes the date the purge was executed, the user name of the user who performed the purge, the type of data purged, the type of user records purged, the date that was entered to select records for purging, the result, and any error messages.

**Note:** The data and user type information is only available in the Professional Edition.

 To view purge history:

1. Display the Server Management page.
2. Click the **Purge History** link.



# 10 Customize the Knowledge Center User Interface

This chapter describes how to customize the appearance of the Knowledge Center. Using the techniques outlined in this document, you can make changes such as:

- Replace logos with your corporate and/or department logos
- Insert custom messages on the Knowledge Center home page
- Modify any text that appears on any page in the Knowledge Center Player
- Change the color of banners and text appearance
- Replace any graphic on any page in the Knowledge Center Player

The following skills are required to make the customizations documented in this section.

- Replacing text is done by creating an XML file. This XML file can be created and modified in Notepad or the XML Editor of your choice.
- Replacing graphics is done by replacing image files in the images directory and executing a utility included with the Knowledge Center installation.
- Changing banner colors and text is done by creating and modifying Cascading Style Sheet (CSS) files. This can be accomplished using Notepad or the CSS Editor of your choice.
- Custom graphics must be created in GIF, PNG, BMP, or JPEG formats. Any graphic editor package can be used to create these graphics.

This section contains the following:

- Basic Customization covers basic customization techniques for quickly applying custom logos to the Knowledge Center.
- Advanced Customization covers advanced customization techniques that can be used to modify any text in the Knowledge Center, insert a custom message on the home page, modify style sheets, and other customizations.

## 10.1 Basic Customization

This section covers the techniques for replacing the delivered text and logo with your own text and logo. These customizations can be applied very quickly.

### Text

All text that appears on pages in Knowledge Center is stored in a single file on the web server. This file can be found in the <install directory>\Web Server\KCenter\bin directory. The file is named eu<langid>.lng; for example euen.lng. The first two characters of this file name, eu, indicate that it is used by the Knowledge Center user interface. Note that there are many other lng files used for other modules of the Knowledge Center. The second two characters indicate the name of the language; for example euen.lng for English. Although this file has an extension of ".lng" it is an XML formatted file.

Within the file each text item appears as shown below:

```
<item stringid="2">
```

```
<text>Welcome</text>
</item>
```

Each item in the file has a stringid and text. The numeric stringid is a unique value that identifies that particular block of text. The `<text>` value specifies the content for the item, that is, the text block.

To specify custom text blocks, you must first create a "customization" file that contains your custom information. This is accomplished by creating a new file named `eu<langid>.cus`. This file uses the same file structure as the `eu<langid>.lng` file. You only need to add the specific text blocks and graphics that you are modifying to the "customization" file, because the `eu<langid>.lng` is read first and then the `eu<langid>.cus` file is read to pick up any customizations.

The customization file has 2 major sections:

- **strings:** This section contains text blocks that appear on various pages and dialogs
- **resources:** This section contains strings that are used internally in Knowledge Center and should not be modified

Do not modify the standard `eu<langid>.lng` file. This file is replaced each time an updated version of the Knowledge Center is installed. Customization files (`.cus`) are never overwritten by Knowledge Center updates.

## Logos

**Note:** The technique used for replacing graphic images has changed since previous versions of Knowledge Center.

All graphic images are stored in a single xml file, `images.xml`, which is used to inject image data directly into Knowledge Center pages, reducing the number of HTTP requests made back to the server. This file can be found in the `<install directory>\Web Server\KCenter\images` directory. A utility program has been included with Knowledge Center that creates this xml file from a directory containing standard image files. In order to replace the delivered logo image with your own you:

- Replace the `small_logo.gif` file in the images directory with your own custom image (named the same).
- Run the `imagegen` utility to rebuild the `images.xml` file.


See "Replace the Graphics" for more detailed instructions.

### 10.1.1 Create a Customization File

The first step in creating a customization file is to create the `eu<langid>.cus` file. Substitute the appropriate two-letter language code as listed below.

**cs:** Czech  
**da:** Danish  
**de:** German  
**en:** English  
**es:** Spanish  
**es-mx:** Spanish (Mexico)  
**fi:** Finnish  
**fr:** French  
**fr-ca:** French (Canada)  
**hu:** Hungarian  
**it:** Italian  
**ja:** Japanese

**ko:** Korean  
**nl:** Dutch  
**no:** Norwegian  
**pl:** Polish  
**pt:** Portuguese  
**ru:** Russian  
**sv:** Swedish  
**tr:** Turkish  
**zh-CHS:** Chinese (Simplified)  
**zh-CHT:** Chinese (Traditional)

 To create a customization file:

1. Using Notepad or an XML Editor, create a new file named **eu<langid>.cus**.
2. Add the following XML code to the file:


```
<?xml version="1.0"?>
<language langcode="<langid>" name="<language name>">
  <strings>
  </strings>
  <resources>
  </resources>
</language>
```

3. Modify the <language> line for the corresponding language. For example, <language langcode="en" name="English">.
4. Save the file.
5. Copy the file to the **<install directory>\Knowledge Center\Web Server\KCenter\bin**.
6. Refresh the browser.

### 10.1.2 Modify a Customization File

Do not modify the installed original eu<langid>.lng file. This file is replaced each time an updated version of the Knowledge Center is installed. You must create a customization file for the language in which you want to customize the Knowledge Center. Customization files (.cus) are never overwritten by Knowledge Center updates.

Each item in the file has a stringid and text. The numeric stringid is a unique value that identifies that particular block of text. The <text> value specifies the content for the item, that is, the text block.

 To modify a customization file:

1. Open the **eu<langid>.cus** file you created.
2. Open its corresponding **.lng** file in Notepad.
3. In the .lng file document, search for the text to be modified.
4. After you have found the desired text, select and copy everything from **<item xxxxx = "##">** to and including **</item>**.
5. Copy items that are to be customized to the appropriate section (text blocks added to <strings>) in the .cus file. In the following example, you want to change the text for the "New User" button on the login page to say "Create New User":


```
<item stringid="10">  
  <text>Create New User</text>  
</item>
```

**Note:** You should delete everything from the `<locations>` marker to the `</locations>` marker. It is not needed and may cause issues when the software is updated to a new version.

6. Save and close the file.
7. Close the .lng file. If prompted, do not save changes.
8. Refresh the browser.

### 10.1.3 Replace the Graphics

One of the most common customizations is to place your corporate or department logo on the Knowledge Center home page.

 To replace the graphic:

1. Create the new graphic and save it in a GIF, PNG or JPEG format. The graphic should be close in size to the one provided with the software and be named **small\_logo.gif** (or .png, .jpg, etc.).
2. Move the provided **small\_logo.gif** file from **<install directory>\Web Sever\KCenter\Images** to some location outside of the Knowledge Center installation directory in case you should need to restore the original logo.
3. Copy your custom logo image named **small\_logo.gif** to the **<install directory>\Web Sever\KCenter\Images** directory. Note that this directory is overwritten during Knowledge Center updates, so you should store the original of your custom logo in a directory outside of the installation location.
4. Run the imagegen utility to rebuild the images.xml file. This utility can be found in the **<install directory>\Web Server\KData\bin** directory.
5. Double-click on **ImageGen.exe**.
6. Browse to the images directory, **<install directory>\Web Sever\KCenter\Images** and click **Open**.
7. Click **Create Images xml**. A message tells you how many image files were converted.

**Note:** The imagegen utility may also be run without the GUI interface if the path to the images directory is specified on the command line. This allows you to create a batch file to replace the logo, since the images directory is overwritten by Knowledge Center updates.

## 10.2 Advanced Customization

This section outlines advanced customization techniques that can be used to further customize the Knowledge Center user interface. This section focuses on specific techniques for customization. Before following any procedures in this section, you need to create a customization file for the desired language or languages. Techniques for creating and modifying customization files can be found in the Basic Customization section.

### 10.2.1 Customize Text

Every text block in the user interface can be customized. This allows you to customize the messages that appear to the user on pages, error dialogs, and so on.

The first step in changing the text is to identify the block of text that you wish to customize and determine its stringid. There are two different methods for doing this. One method is to copy the text from the Knowledge Center user interface and search the eu<langid>.lng file for the appropriate item. You can then place the appropriate entry in your customization file (.cus). Knowledge Center also provides a special mode that allows you to view the stringids as you are running the user interface. Please note however, that this mode is applied at a server wide level and affects all users of the server. It is more appropriate for pre-production and testing servers.

 To display the stringids in the user interface:


1. Open **<install directory>\Web Server\KCenter\web.config**.
2. In the **<appSettings>** section add the following value: **<add key="DisplayLocaleIDs" value="true"/>**.
3. Save the changes to **web.config**.
4. Open Knowledge Center, if necessary, and refresh the view.

After IDs are enabled, the user interface displays all stringid values at the beginning of each text block.

After identifying the stringid that you want to customize, add the appropriate XML to your eu<langid>.cus file. All text customizations should be added to the <strings> section of the file. An example is shown below:

```
<?xml version="1.0"?>
<language langcode="en" name="English">
  <strings>
    <item stringid="10">
      <text>Create a user</text>
    </item>
  </strings>
  <resources>
  </resources>
</language>
```

You may also see elements in the eu<langid>.lng file for <location>. The <location> element and what it contains does not need to be added to the customization file as it may cause issues when the software is updated to a new version.

 To turn off the stringids in the user interface after customization:

1. Open **<install directory>\Web Server\KCenter\web.config**.
2. In the **<appSettings>** section change the "true" value to "false" on the **<add key="DisplayLocaleIDs" value="true"/>** line.
3. Save the changes to **web.config**.
4. Open Knowledge Center, if necessary, and refresh the view.

## 10.2.2 HTML Tags in Text Blocks

Knowledge Center also supports the use of HTML tags in text blocks. These are particularly useful when customizing the messages in the "Instructions" area of many Knowledge Center pages such as Knowledge Paths, User Profile, and so on. HTML formatting tags can be used to create line breaks, boldface text, apply styles, and so on. The following HTML text block example shows the text that appears in the left pane on the Knowledge Paths page.

```
<item stringid="309">  
<text> Items you need to know are grouped together to form a knowledge repository. In  
Knowledge Center, these items are organized and placed into knowledge  
paths.<br><br>Click the knowledge path you wish to launch. If you do not see the  
knowledge path you want to take, click 'Enroll or Withdraw' to sign up for a subject.</k  
the  
text>  
</item>
```

HTML tags in the customization file must be XML encoded. In the above example, the string, `<br>` represents the `<br>` HTML tag. If modifying the customization file in Notepad, you must encode characters such as `<`, `>`, and so on. If using an XML Editor, the tool may encode the character automatically for you. Consult the XML Editor documentation for more information on this capability.

### 10.2.3 Customize Graphics

**Note:** The technique used for replacing graphic images has changed since previous versions of Knowledge Center.

All graphic images are stored in a single xml file, `images.xml`, which is used to inject image data directly into Knowledge Center pages, reducing the number of HTTP requests made back to the server. This file can be found in the **<install directory>\Web Server\KCenter\images** directory. A utility program has been included with Knowledge Center that creates this xml file from a directory containing standard image files.

In order to customize the Knowledge Center user interface, you replace images supplied with the product with your own custom images and then rebuild the xml file containing all the image data.

The first step in customizing the user interface is to make a backup copy of the **<install directory>\Web Sever\KCenter\images** directory. This allows you to restore the original user interface if you need to do so later.

You then need to determine which image files you need to replace. You can do this either by looking at the original image file's name, which in many cases indicates what the image is used for, or by viewing the original images directory as Tiles with thumbnails enabled in Folder Options. You can then either copy the images you want to change to a working directory outside of the installation location if you wish to modify the existing images, or create new image files from scratch. In either case, your custom images must be named the same as the images they are replacing, and with the exception of the logo image, must be the same size as the original.

**Note:** You are not able to identify an image file by right-clicking on the image from within Knowledge Center as individual image files are no longer referenced in the web pages.

Although your custom images must be the same size and have the same filename as the ones you are replacing, they do not need to be in the same format. For example, you could create your custom logo as `small_logo.png`. However, you then need to remove `small_logo.gif` from the original images directory. In other words, only one image with a given name may exist, regardless of the file extension.

Your custom graphics should be maintained in a directory outside of the installation location, as the **<install directory>\Web Sever\KCenter\images** directory is overwritten during Knowledge Center updates.

When you have finished creating your custom graphics, copy them into the **<install directory>\Web Sever\KCenter\images** directory, replacing the originals. If you have created any graphics with a different format than the original (for example, `small_logo.png` to replace `small_logo.gif`), you will need to manually remove the original from the images directory so that only a single graphic with that filename exists in the directory.

Run the imagegen utility to rebuild the images.xml file. This utility can be found in the **<install directory>\Web Server\KData\bin** directory.

- Double-click on **ImageGen.exe**.
- Browse to the images directory, **<install directory>\Web Sever\KCenter\Images** and click **Open**.
- Click **Create images xml**. A message tells you how many images were converted.

**Note:** The imagegen utility may also be run without the GUI interface if the path to the images directory is specified on the command line. This allows you to create a batch file to customize your graphics, since the images directory is overwritten by Knowledge Center updates.

### 10.2.4 Add a Message to the Home Page

Knowledge Center provides a method for adding a message to the home page. This functionality allows you to specify the path and name of a file that contains a fragment of HTML. This creates a third pane on the right side of the home page in Knowledge Center.

To accomplish this task, you must first create a customization (.cus) file for the language that you want to customize, if you have not already done so. See *Create a Customization File* for more details. Next, create a file that contains a fragment of HTML. You can use any HTML editor to do this. For example:

```
<p><a class="MainHead">Need Help?</a></p>
<p class="InstructText">For assistance call extension <b>5555</b></p>
```

Once you have created this fragment, save it as a file with the name string650.htm. Place this file in the **<install directory>\Web Server\KPath\bin** on the server. The above example uses Knowledge Center style tags to ensure that the message is consistent with other Knowledge Center text blocks. See the following sections for more information about Knowledge Center styles.

The next step is to add an entry to the customization file (eu<langid>.cus) that contains the path to this file. You must specify this customization under stringid 650. This text block must be added to the **<resources>** section. The following is an example:

```
<item stringid="650">
  <text>bin\string650.htm</text>
</item>
```

When the Knowledge Center is run, this HTML fragment is inserted on the home page. It is also possible to use Knowledge Center styles to format this HTML so that it is consistent with the other text on the home page.

### 10.2.5 Change the Appearance of Text

All text blocks in the Knowledge Center are formatted using Cascading Style Sheets (CSS). This allows you to change the appearance of the interface very quickly. Changes you may wish to make to the appearance of text in the Knowledge Center are:

- Size
- Font
- Color

Knowledge Center uses a style sheet found in the **<install directory>\Web Server\KCenter\Styles** directory. To apply your own custom style, you must first create a new

directory under Styles with an appropriate name such as "custom". You can name this directory differently if required. Then copy the file from the \Styles directory to \Styles\custom. You can then modify the styles defined within these files.

**Note:** Do not modify the .css files in \Styles. These files are replaced each time an updated version of the Knowledge Center is installed. Files in a "custom" directory are not overwritten.

**Note:** A discussion about creating style sheets is outside the scope of this document. There are many books and web resources that cover this topic.

Once the styles have been updated, you must create entries in the Knowledge Center customization file so that the Knowledge Center uses your custom file. The stringid value for the general.css is 3.

For example, the string in the eu<langid>.lng file for general.css is:

```
<item stringid="3">  
  <text>Styles\general.css</text>  
</item>
```

If you placed the copy of this file in Styles\Custom, the entry in the customization file (eu<langid>.cus) would be:

```
<item stringid="3">  
  <text>Styles\Custom\general.css</text>  
</item>
```

### 10.2.6 Customize Subject Outline Highlight Colors

The Knowledge Center subject outline uses three colors to indicate to the user which item in the outline is selected, moved over with the mouse, and neither of the previous. These colors can be customized in the customization file. The following three stringids are used to perform this customization. To modify, insert these strings into the customization file and use standard HTML color attributes for your custom colors.

244 - Item not selected and mouse not hovering over (by default this is white in Knowledge Center and should be changed to match the background color of the outline.

245 - Color used when user's pointer is moved over an item in the outline (by default this is yellow)

246 - Color used to represent the currently selected item in the outline (by default this is blue)

### 10.2.7 Change the Frame Border Color

If you change the background color of the pages in Knowledge Center, you should also change the frame border color to match. The frame border appears in Knowledge Center in locations that use HTML framesets such as subject playback, expert advice, search, and so on. The color only needs to be customized in one location. This can be done by setting stringid 667 to the same color in your customization file (.cus).



# 11 Knowledge Center Cookies

A number of cookies are stored in your browser when viewing content from the Knowledge Center. These cookies are described below. The information includes parameters, the format the cookies are stored and if they persist past the end of a browser session.

## **.ASPXCOOKIEAUTH2**

Stores the .NET authentication, created by .NET, in an AES encrypted format using the .NET Machine Key as the key. This cookie is not persistent.

## **ORA\_UPK\_KPATH\_User\_(SessionID)**

Stores the application information in an AES encrypted format using the session ID as the key. This cookie is not persistent.

- Workgroup ID: Workgroup identification
- Lang ID: Language identification
- Help Enabled: Indicates if Help is enabled
- UserID: User identification
- Permissions: Permissions bitmap
- NtIntegrated: True if using Integrated Security
- NewUser: New user flag

## **ORA\_UPK\_KPATH\_WorkgroupID**

Stores the default workgroup as plain text. If the cookie is disabled, the workgroup selection is not remembered and defaults to the last workgroup selected. This cookie persists for one year.

- Workgroup ID: Workgroup identification

Example: WorkgroupID=1

## **ORA\_UPK\_KPATH\_DefaultLanguage**

Stores the default language as plain text. If the cookie is disabled, the language selection is not remembered and defaults to the language of the browser. This cookie persists for one year.

- LanguageID: Language identification

Example: LanguageID=1

## **ORA\_UPK\_KPATH\_LoginInfo**

Stores the login and password information in an AES encrypted format using the .NET Machine Key as the key. If the cookie is disabled, the username/password does not persist and the user is presented with the login page. This cookie persists for one year.

- UserID: ID of user
- Password: Hashed password using SHA 256
- WorkgroupID

Example: UserID=1; Password=XXXXXXX; WorkgroupID=1

## **ShowOutline\_(UserID)**

Client cookie that remembers if the outline was last shown. It is stored as plain text and persists for one year. If the cookie is disabled, the outline always displays.

- ShowOutline\_(UserID): Determines (True or False) if the outline should be displayed.

Example: ShowOutline\_(UserID)=true

**OutlineWidth\_(UserID)**

Client cookie that remembers the outline width in the course playback. It is stored as plain text and persists for one year. If the cookie is disabled, the default width is used.

- OutlineWidth\_(UserID): Number of pixels for the outline width.

Example: OutlineWidth\_(UserID)=500

**SearchWidth\_(UserID)**

Client cookie that remembers the Search results width in Search window. It is stored as plain text and persists for one year. If the cookie is disabled, the default width is used.

- SearchWidth\_(UserID): Number of pixels for the search results width.

Example: SearchWidth\_(UserID)=500

**ORA\_UPK\_KPATH\_KPContent**

Stores the UserID for the content web applications and the enrollment array. It is stored as plain text and does not persist.

- UserID: ID of user
- Enrollment: Enrollment array

Example: SearchWidth\_(UserID)=500

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## **12 Knowledge Center 3rd Party Copyright Statements**