LMS USER GUIDE
STATUS RULES

Section Administrators ⟩ Organisation Administrators

CREATING A STATUS RULE

1) Navigate to status using the relevant procedure for your level of access as shown below	
Section Admin Procedure	Section Admin Dashboard>Status Rules
Organisation Admin Procedure	Organisation Admin Dashboard>Status Rules
2) Select **Status Rules** from the quicklinks on the dashboard	

|		
3)	Select **New Status Rule**	>> Section Admin Dashboard >> Status Rules 18 November 2014 **Status Rules** **Go directly to a record** Search for multiple records by separating your search terms with commas in the box below. Course ▼ : [_____] Find ☑ Tick here to find partial matches Course ↓ Status ↓ Allocate ↓ Deallocate ↓ Rule Name ↓ Send Message ↓ ○ How to Delegate Effectively Competent How to Develop a Culture of Openness and Trust PAB1 Paul [New Status Rule] Delete Rule View Rule
4)	Before you create a status rule you need to use an existing filter or create a new filter. In this case we will create a new filter. The filter determines who this rule applies to Select **New Filter**	**Step 2: Filters** This is where you select who will be affected by this rule A user in None / Unknown ▼ [New Filter] View Filter Delete Filter Individuals
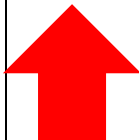
5) To complete the form follow these steps:

Step1 select type of user In the main this will be Learners

Step 2 refine you filter using the available parameters

Step 3 you can include other filters (if you do not wish to include the original filter please tick this box)

Step 1: Choose the users

Here you can select the users you want to be included

User Type | Learner ▼

Step 2: Choose the parameters of the filter

Here you can choose the filter parameters. Organisation defaults to 'all' unless you choose from the drop down list. The parameters help you to refine your filter. You can choose to use one or multiple parameters

Find by organisation

Organisation | All
Department |

and/or by group/manager

Manager |
Group |

and/or by what they have been allocated

Course |
Course Status |
Module |
Module Status |

Step 3: Do you need to include other filters?

Ticking this box will exclude all parameters in this filter. Tick this box if you only want to include the parameters dictated from the existing filters selected below. This means anything selected in the fields above will be disregarded

Include Other Filters

☐ Include ONLY results from sub-filters (and none from this filter)

If you would like to include other existing filters please tick the relevant boxes below

☐   's PAB Enable Demonstration Learners on in

☐   All Users

☐   Individuals: 1 Users (+leesrlearner2, ...)

☐   Individuals: 4 Users (Paulmanager111, Paulmanager112Paulmanager114, ...)

☐   ISB Org Learners

Step 4 give the filter a name (if you don't the system will auto generate one) and then click **Save**

Step 4: Give your filter a name

If you leave 'auto generate' ticked the system will generate a name based on the information you have included in the filter

Filter Name | New Filter | ☑ Auto Generate

[Save]   [Cancel]

6) Follow the steps and associated instructions then select **Save**	>> <u>Section Admin Dashboard</u> >> <u>Status Rules</u> >> <u>View Status Rule</u> 18 November 2014 **View Status Rule** <u>Help</u> **Step 1: Status rule name*** **Give the rule a name** Rule Name **Step 2: Filters** This is where you select who will be affected by this rule A user in None / Unknown ▼ [New Filter] [View Filter] [Delete Filter] [Individuals] **Step 3: Conditions** Choose what needs to happen in order for the status rule to be triggered **When the conditions are satisfied** Having job role ▼ Reaches the status ▼ On the course ▼ Or the module ▼ After the date ▼ Superquiz score (%) Between [ ] And [ ] **Step 4: Action** What happens once the conditions have been fulfilled? **Carry out the actions** Assign Course ▼ Assign Module ▼ Deallocate Course ▼ Allocate Job Role ▼ Allocate Group ▼ Send Message ▼ [Save] [Cancel]
Please note; If selecting 'competent' for the condition 'Reaches the Status' another parameter will appear in the actions box. This is called 'Delay (In Weeks)'. This parameter allows you to delay when the action will happen e.g. selecting a 4 week delay will mean that the action will not be carried out until 4 weeks after the user reaches the status 'competent'. If using status rules with superquiz scores please refer to the superquiz user guide.	**Step 3: Conditions** Choose what needs to happen in order for the status rule to be triggered **When the conditions are satisfied** Having job role ▼ Reaches the status Competent ▼ On the course ▼ Or the module ▼ After the date ▼ **Step 4: Action** What happens once the conditions have been fulfilled? **Carry out the actions** Assign Course ▼ Delay(In Weeks) ▼ Assign Module ▼ Deallocate Course ▼ Allocate Job Role ▼ Allocate Group ▼ Send Message ▼

7) The status rule is now available to view	>> Section Admin Dashboard >> Status Rules 18 November 2014 **Status Rules** **Go directly to a record** Search for multiple records by separating your search terms with commas in the box below. [Course ▼] : [_____] [Find] ☑ Tick here to find partial matches |	Course ↓	Status ↓	Allocate ↓	Deallocate ↓	Rule Name ↓	Send Message ↓
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○	How to Delegate Effectively	Competent	How to Develop a Culture of Openness and Trust		PAB1	Paul
◉	Charlie	Competent	Bc test		testing rules		 2 records [New Status Rule] [Delete Rule] [View Rule]