

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

>> [Section Admin Dashboard](#)

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[View User: Paul Acres1](#)

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3) Select **New Status Rule**

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Status Rules

Go directly to a record

Search for multiple records by separating your search terms with commas in the box below.

Course :

☒ Tick here to find partial matches

| Course ↓ | Status ↓ | Allocate ↓ | Deallocate ↓ | Rule Name ↓ | Send Message ↓ |
|---|-----------|--|--------------|-------------|----------------|
| <input type="radio"/> How to Delegate Effectively | Competent | How to Develop a Culture of Openness and Trust | | PAB1 | Paul |

4) Before you create a status rule. You need to use an existing filter or create a new filter

5) In this case we will create a new filter the filter determines who this rule applies to

Step 2: Filters

This is where you select who will be affected by this rule

A user in

6) Select **New Filter**

7) To complete the form follow these steps

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

9) Step 2 Refine your filter using the available parameters

10) Step3 You can include other filters(If you do not wish to include the original filter please tick this box)

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

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 (+leeslearner2, ...)
- ☐ Individuals: 4 Users (Paulmanager111, Paulmanager112Paulmanager114, ...)
- ☐ USB On Learners

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

- 12) Follow the steps and associated instructions
- 13) Then select **Save**

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View Status Rule

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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

14) The status rule is now available to view

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| <input checked="" type="radio"/> Charlie | Competent | Bc test | | testing rules | |

2 records