IV   **(S) Click on the Users tab**
  A.   **In the Roles section:**
    1.   **Click on the Manage Roles link**
      a.   You have a couple of options here
        1)   **Add** a Role.
        2)   View system default roles and modify them by click on their named links.
      b.   Edit the Manager Role by clicking on the Manager link.
      c.   Use the Permissions drop down box to select Course Management.
        1)   Check off the following roles
          a)   Enroll Approvals
          b)   View Results
          c)   Enroll User
          d)   Click **Save**
          e)   Click **Done**
        2)   Use the navigation history to return to Roles.
        3)   Delete roll by clicking on the Delete link[1]
      d.   Click the **Add** button to create a new Role
        1)   Enter "Course Administrator",
        2)   Enter a Description "Learning System user who manages course offerings".
        3)   Click **Save** to returned to the Manage Roles view
      e.   If you used our example, then click on the Course Administrator link to edit the permissions for this role.
        1)   The Role name and Description can be edited.
        2)   You can specify permissions for the features and functionality of each Menu available in the LMS for this new Role by selecting the Menu title from the drop down list and then checking off which items you would like included in that view.
        3)   Items that are not selected will not be available to users with this new Role.
        4)   If No items are selected for Permission then users in this role will not have access to that associated Tab.
        5)   By default no permissions are granted.
        6)   Select Course Catalog from the drop down list
          a)   Check off all five options
          b)   Add additional permissions if you like.
          c)   Click **Save** when finished
          d)   Click **Done** to return to the previous screen.
      f.   To add additional roles, repeat the previous steps in this section.
      g.   Click **Done** at the confirmation screen to return to the Users Menu

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1 Only available with user added Roles- deletions are immediate. Use caution.

2. Click the Manage Automatic Assignments link.
  - **a.** Click on the <u>Course Administrator</u> Role link
    - 1) Click on the **Add Automatic Assignments** button.
    - 2) Select the "Match Type" (this information is stored in the LDAP.)
      - a) Attribute
      - b) Group
      - c) Name
    - 3) We selected "Attribute"
    - 4) Enter the Matching String[2].
      - a) "LdapId=ed*" which will only affect users who's LDAP user ID begins with the letters "ed".
      - b) Therefore in our system Ed Dussourd will be automatically assigned in the newly created Course Administrator role when he signs on to the LMS.
- **B. In the Profiles[3] section**
  - **1. Click on the <u>User Profiles</u> link**
    - **a.** User profiles are stored in Categories.
    - **b.** Click on the **Add Category** button
      - 1) Enter a Name - "Technical H2 Specialist"
      - 2) Enter a Description – "Horizon 2 product specialist"
      - 3) Click **Save**
    - **c.** Notice that a new action buttons have been added to the form
      - 1) **Edit Categories**
      - 2) **Add Categories**
      - 3) **Remove Categories**
      - 4) **Add Profiles**
      - 5) **Remove Profiles**
    - **d.** Click on the **Add Profile** button
      - 1) Enter a Name, LMS
      - 2) Enter a Description Learning Management System
      - 3) Click **Save**
    - **e.** Repeat the process to add two or more profiles for this Category.
    - **f.** Add additional Categories and the associated profiles.
    - **g.** Click **Done** when finished.
  - **2. Click on the Auto-enrollment Profiles[4] link**
    - **a.** Because system administrators assign these profile sets they are sometimes referred to as "System Profiles".
    - **b.** Auto-enrollment Profiles are stored in Categories.
    - **c.** Click on the **Add Category** button
      - 1) Enter a Name - "HR"
      - 2) Enter a Description – "Human Resources"
      - 3) Click **Save**

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2 This feature allows administrators to manage users based on the data contained in the LDAP. You will need to be familiar with the contents of the LDAP in order to enter a valid matching string. See Admin Guide for details and Appendix A for information on matching strings.

3 Both of these profile types listed below which we defined here will be used in the Course Management Menu that we will see later.

4 Auto-Enrollment Profiles are those that only an administrator may assign to a user for the sole purpose of auto-enrolling a student in a select course or courses.

  d. Notice that a new action buttons have been added to the form
   1) **Edit Categories**
   2) **Add Categories**
   3) **Remove Categories**
   4) **Add Profiles**
   5) **Remove Profiles**
  e. Click on the **Add Profile** button
   1) Enter a Name – "Office Etiquette"
   2) Enter a Description – "Legal Requirement"
   3) Click **Save**
  f. Repeat the process to add two or more profiles for this Category.
  g. Add additional Categories and the associated profiles.
  h. Click **Done** when finished.

C. In the Users Section

 1. Click the <u>Roster Users</u> link
  a. On the next page you have a few options.
   1) Roster one or more Users
   2) Roster one or more Groups
   3) Roster users by importing them from a file.
   4) Configure automatic rostering using matching strings.
  b. Select the <u>Roster one or more users</u> link.
   1) Enter **"*"** in the User ID field.
   2) Click on **Search.**
   3) Click **Add All**
   4) Click **Continue**
  c. Click **Done** at the confirmation screen to return to the main **Users** tab.

 2. Click the <u>Manage Users</u> link
   1) Enter **"ed*"** in the Last Name field.
   2) Click on **Search.**
   3) Check off "Edward Dussourd" from the search results list.
   4) Click on **Add Selected**
   5) Click **Continue**
  b. On the next page there are a few tabs:
   1) Assign Roles (default tab)
   2) Assign Auto-Enrollment Profiles
   3) Assign User Profiles
   4) De-Roster
  c. The default tab **Assign Roles**
   1) We have selected a user who has been associated with the Automatic Assignment Assignments of Course Administrator that we defined in the last section.
   2) If you select multiple users with different profiles then you will not see the Automatic Role Assignments section displayed.
   3) Select the Role(s) you would like to associate with the user(s)
    a) Check off **Manager**
    b) Click **Save**.
  d. Click on the **Assign Auto-enrollment Profiles** tab
   1) Select a Category

       2)   Select the Profile(s) from the list provided to associate with your user(s) and click **Save**.

e.   Click on the **Assign User Profiles** tab

       1)   Select the Category

       2)   Select the Profile(s) from the list provided to associate with your user(s) and click **Save**.

f.   **De-Roster** tab

       1)   Remove a users access to the LMS system

       2)   You will be prompted with a confirmation message box.

       3)   Click **Cancel**

g.   Click **Done** at the confirmation screen to return to the **Users** tab

End of Users Scenario
End of Administrator Scenario