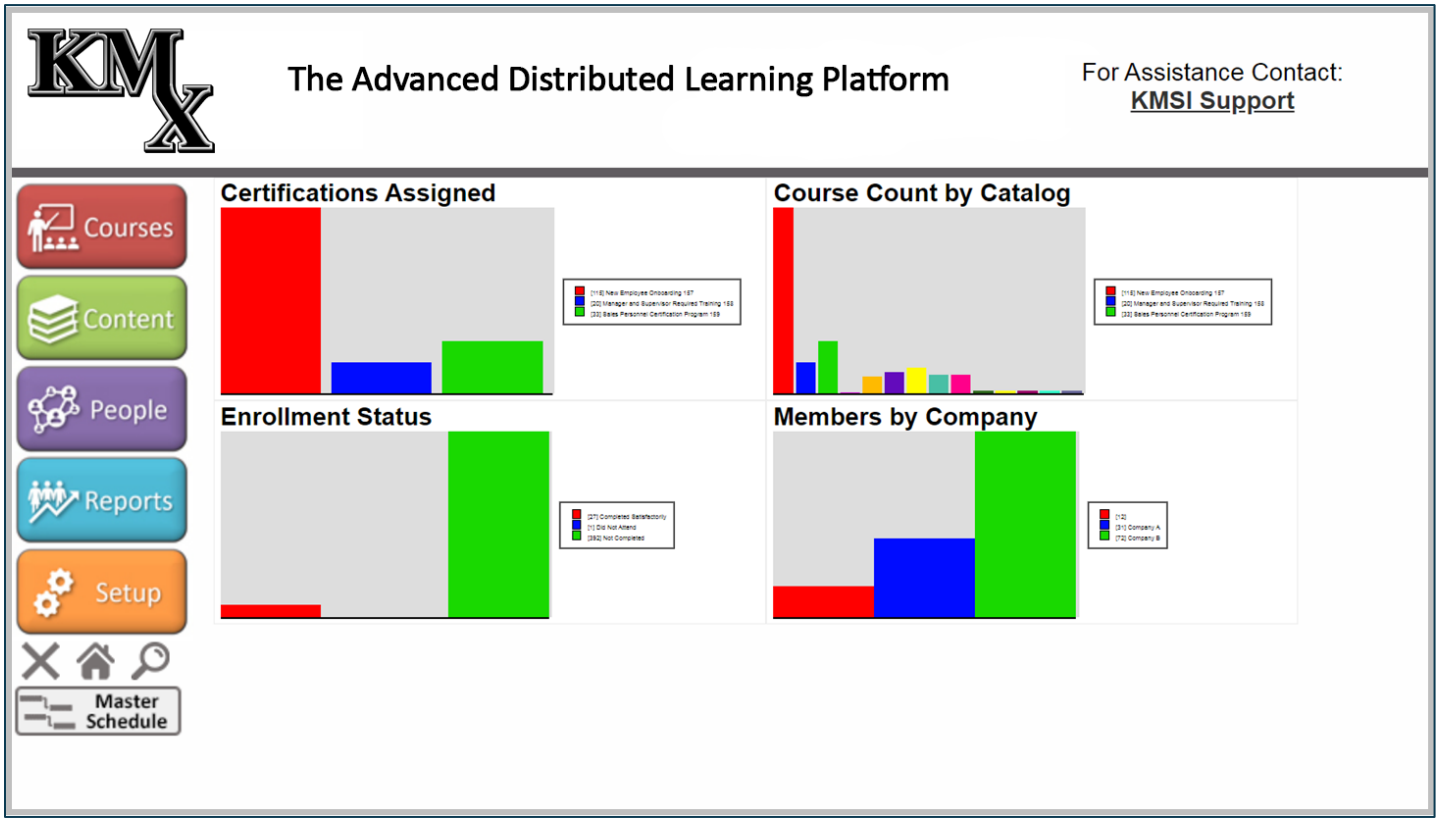
KMx Version 15

Developer & Administrator Guide



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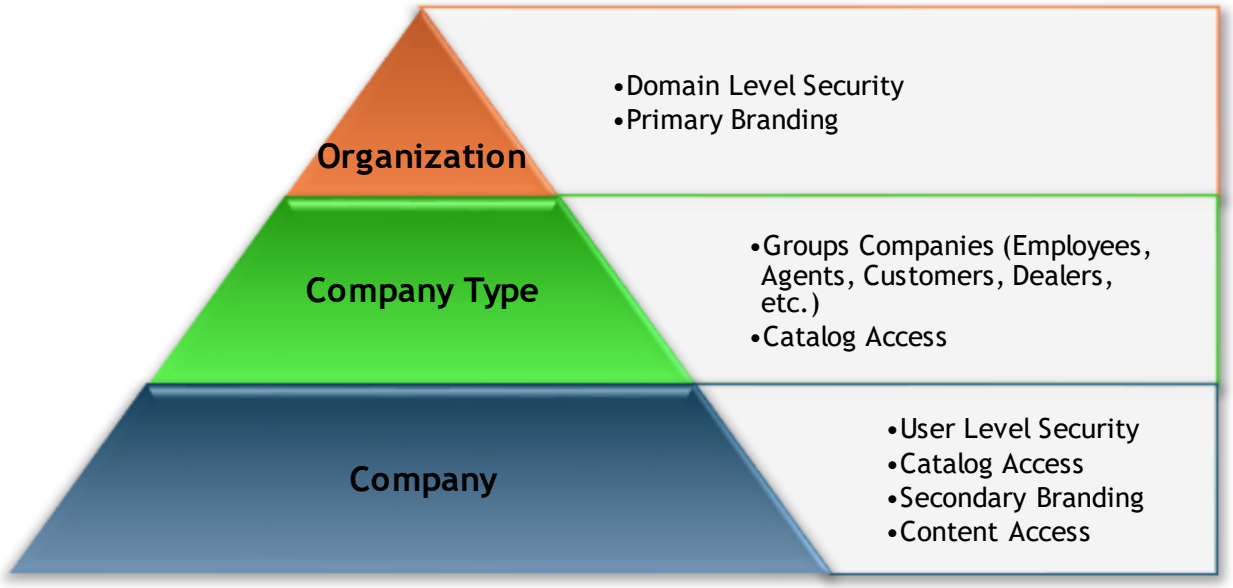
1 Introduction

KMx was designed to enable client organizations to reduce costs attributable to development, delivery and maintenance of training and documentation. The performance-based architecture provides employees/users targeted training, documentation, and performance support. KMx will create an Enterprise Knowledge Repository within your Organization designed using a learning and performance support paradigm to maximize potential uses of the content while minimizing the development effort. KMx can significantly reduce the number of applications required to provide an Enterprise Learning, Performance and Talent Management solution.

1.1 Site Hierarchy

The highest level in the KMx hierarchy is a site. A site is an installation of the KMx application and associated utilities in either the customer data center or in a KMSI provided data center. A site has at least 1 "Organization" that is designated for receipt of system updates as the baseline configuration for all other "Organizations" on the site. Refer to the figure below for an illustration of the KMx Site Hierarchy.



1.2 Organizations

Organizations are the highest operational entities within a KMx site installation. Most KMx clients operate with a single KMx Organization. Some KMx Enterprise clients have multiple Organizations to provide complete segregation of users, content and record keeping. The decision to launch multiple Organizations is normally based on legal and regulatory agency requirements. All KMxASP clients operate within a single Organization. Primary security and the default branding of a KMx Site installation is controlled at the Organization level.

1.3 Companies and Company Types

Companies are a logical subdivision of an Organization. Companies are normally used to segregate user populations (stores, affiliates, subsidiaries, etc.). Each company can have unique branding, style sheets,

catalogs, class schedules and other elements. Personnel are assigned to companies and their company affiliation determines their ability to access Organization offerings. A Member (person) can only be associated with one company at a time. Company types are used to group Companies (All Dealers, All Franchises, All Stores, etc.). Catalog, class, and other elements that can be restricted to a Company can also be restricted to a Company Type for ease of administration.

1.4 Language Types and Email Templates

KMx incorporates a unique technology known as "Language Packs" to enable clients to provide user interfaces in multiple languages and multiple variants of a single language within an Organization. There are currently 12 base language packs as follows:

1. English
2. French
3. Spanish
4. Portuguese
5. Italian
6. German
7. Korean
8. Chinese
9. Japanese
10. Russian
11. Dutch
12. Polish

At the request of customers, KMSI has commissioned new language packs for localized variants of the above languages and also for languages not maintained in our base selection. A language pack consists of roughly 500 phrases and icons that are displayed on the user interfaces. Each of the phrases and icons can be changed by the client by submission of a language pack revision to KMSI support. The packs are provided to clients in an Excel spreadsheet format for easy editing and maintenance. Language packs also include a series of client customizable Email Templates that are used for user notifications, confirmations, reminders, and other site email correspondence. Email template modification and maintenance is more thoroughly covered in the System Administration chapter.

1.4.1 Universal Assignment of Custom Data Variable Names

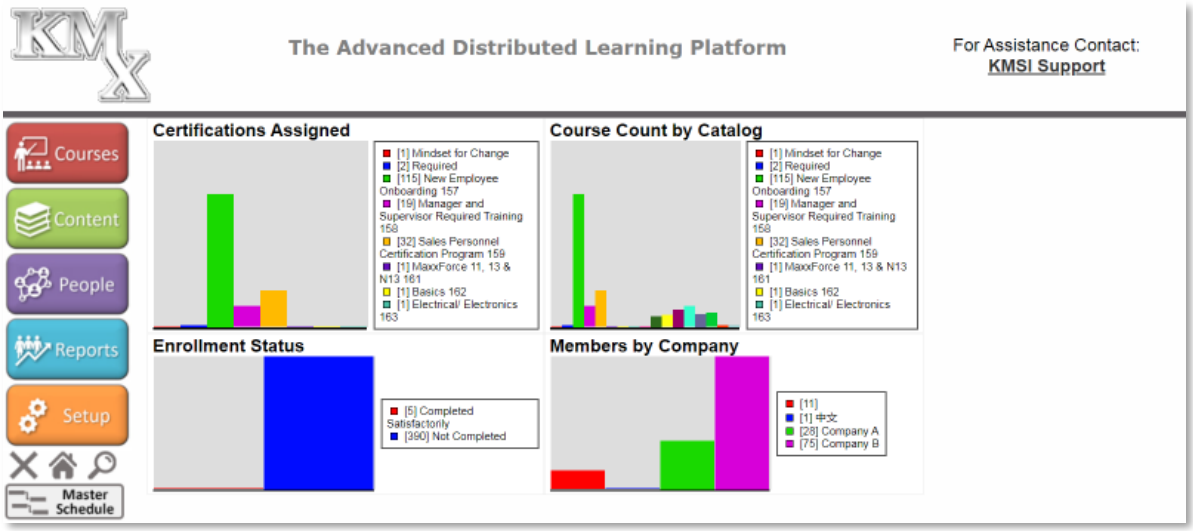
With KMx Version 14, the language pack system has been extended to include all available custom data fields. This update supports all KMx Forms, Reports, Charts, Graphs and Maps. The update also integrates with the Report Data Selector Tool and associated wizards.

2 KMx Developer/Administrator Interface

The KMx application architecture is divided into two distinct applications:

- The Developer/Administrator Interface
- The Student/Instructor/Supervisor Interface

This division enables developers and administrators with easy access to the KMx data system using a highly dynamic, form driven user interface. Students and instructors are presented with a much simpler user interface that enables interaction with the data in the KMx data system to accomplish registration, conduct and recording of training functions.



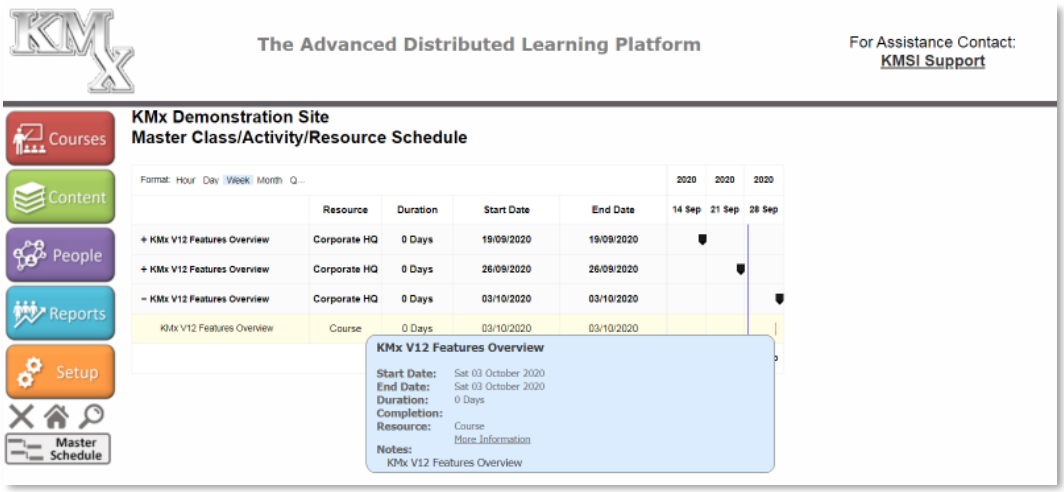
The KMx developer/administrator interface is arranged into 5 tabs organized by function. The five tabs are grouped along the left side of the KMx developer/administrator interface in an area called the sidebar.

These tabs organize primary KMx functions as follows:

- Courses and Classes
- Content, Exams and SCORM Import Utilities
- People, Labor Categories and Certifications
- Reports and Report/Graph Creation
- Setup and System Administration

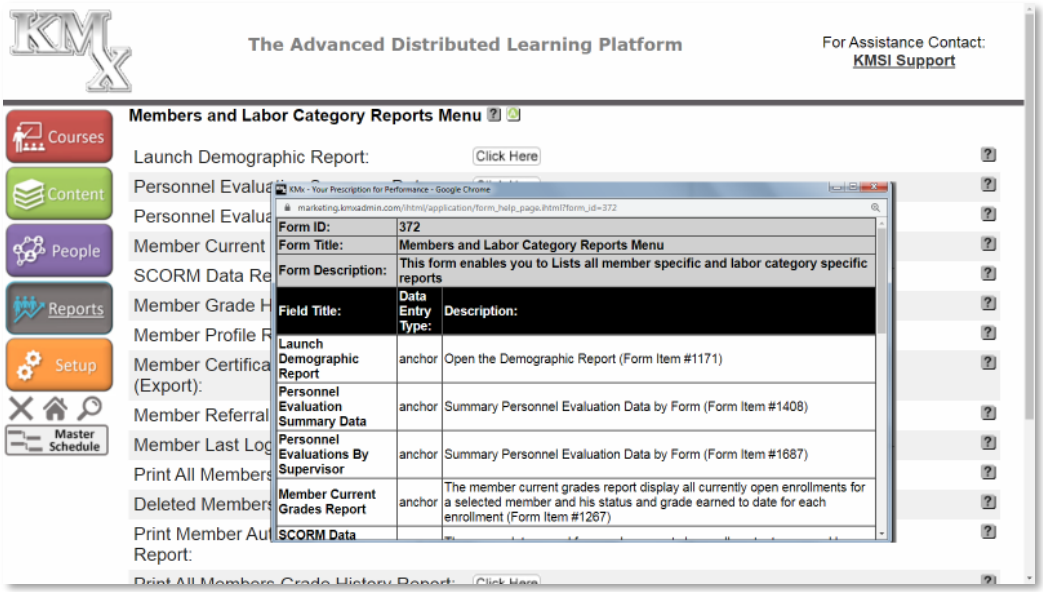
In addition to the 5 tabs, the KMx sidebar also provides the following options:

- Stop – to logoff
- Home – returns the user to the main option screen
- Search – enables the user to search the content management system
- Master Schedule – provides a Gantt chart of all organization classes, activities and scheduled utilization of resources



2.1 Help Information

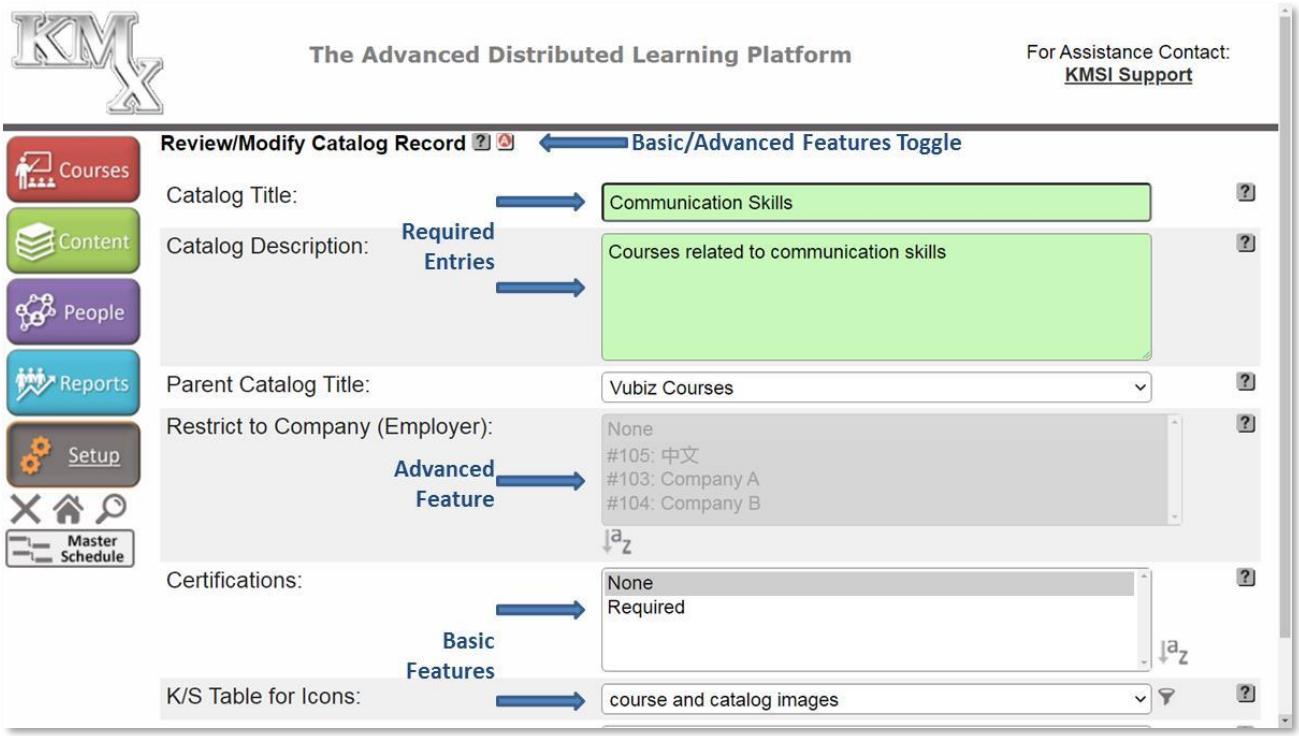
In addition to the help icons available on each data entry field and dropdown on the administrative interface, KMx includes help icons at the top of each form. These icons provide a description of the forms purpose and use on hover-over and provide a popup reference for all possible entries on click.



2.2 Basic/Advanced Features Toggle

KMx includes a Basic/Advanced Features toggle that enables the administrator to “hide/display” advanced form settings. The small green “A” icon at the top of each form can be clicked to put the entire administrative interface into either Basic (orange) or Advanced (green) mode. Once a mode is selected, the interface will continue in that mode unless the icon is clicked to toggle the mode. In the Basic mode, all advanced options will appear as grey (see below) options that cannot be changed unless the mode is toggled. This toggle is designed to assist new developers and administrators focus on the important or “basic” elements of a form before experimenting with more advanced features.

2.3 Required and Maximum Form Entries



All KMx Administrative Forms ensure that "Required" data entry fields are clearly indicated with a green background when the form is displayed. Green fields must be completed for the record to be saved. Required field backgrounds will turn white once data entry in the field has commenced.

Should a required entry not be completed, the user will receive a warning if the user attempts to save the record in an incomplete state. This warning will also return the background color of the required entries to green to make it easy to identify which field(s) still requires an entry.

Field background colors will change to yellow if the current entry exceeds 85% of the field's length and red when the entry is at the maximum field length.

2.4 Logoff, Home, and Search Icons

Directly beneath the Function Tabs, there are three icons. These icons are selectable from any screen on the KMx Developer/Administrator interface.

2.4.1 Logoff ✕

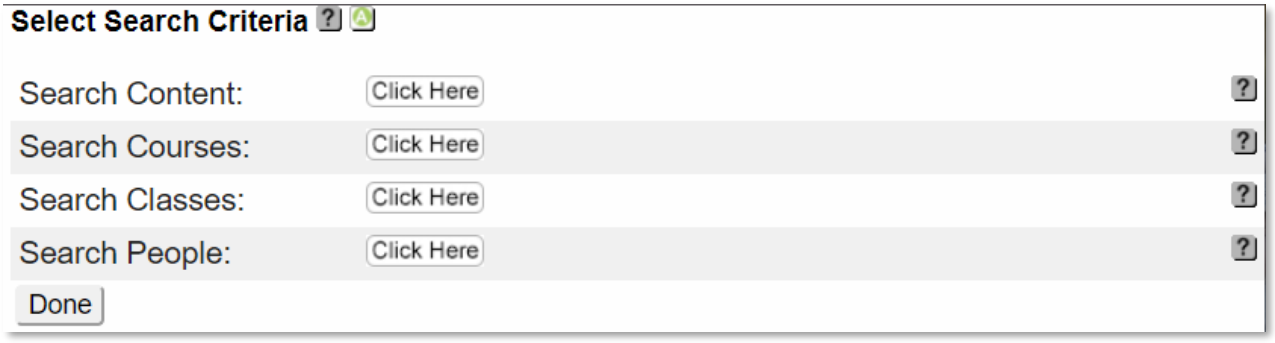
This X icon enables the developer/administrator to terminate the security session with the KMx servers. It should be used to logoff (vice closing the browser). Selection of this icon clears all security tokens and ensures that a complete login cycle will need to be completed to access the Developer/Administrator interface.

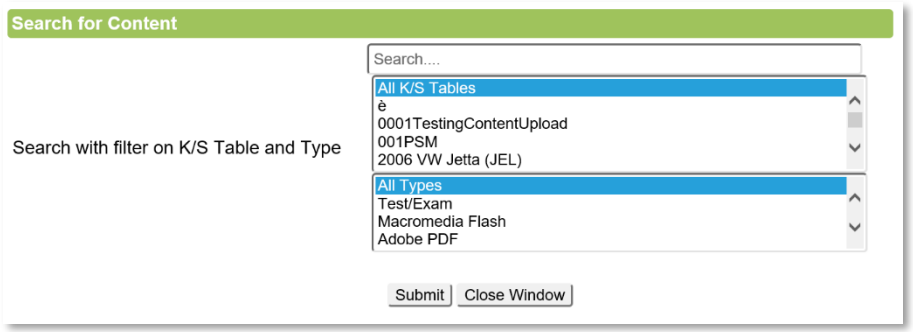
2.4.2 Home

This house icon enables the developer/administrator to return to the main menu from any process option or form. If selected from a form, all data entry since the last record save or refresh cycle will be abandoned.

2.4.3 Search

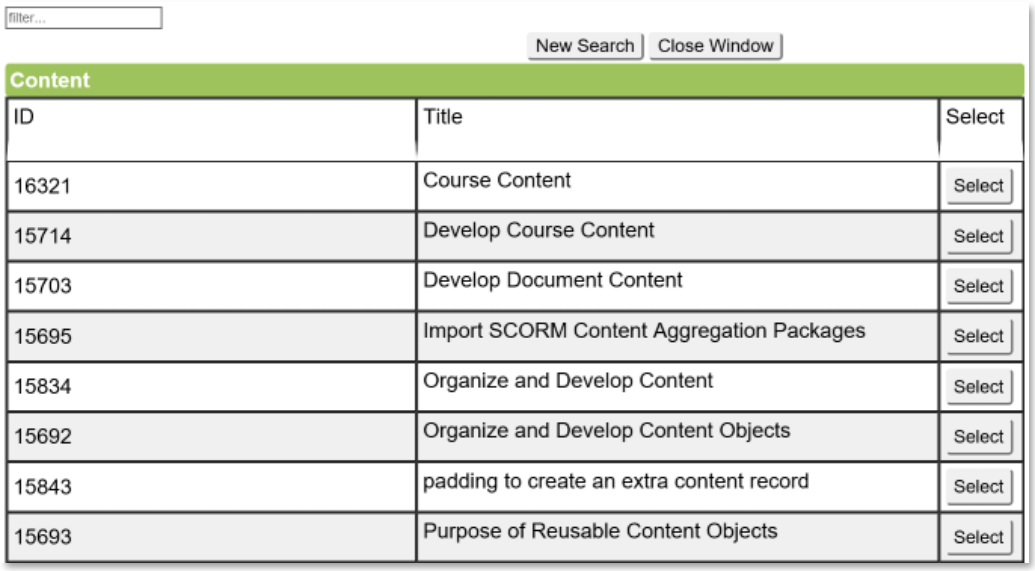
The search icon enables the developer/administrator to perform a variety of search functions including Content, Courses, Classes, and People.





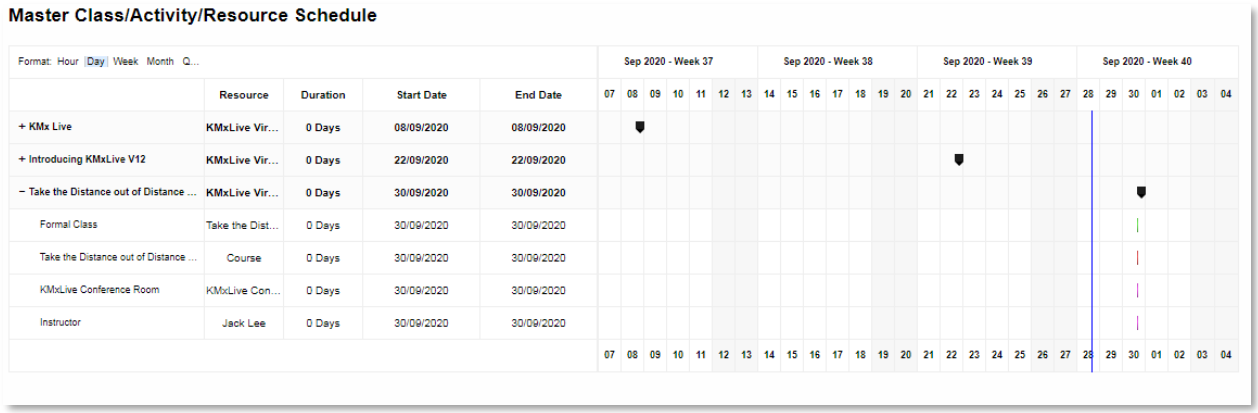
A sample Content search is depicted to the left. Below represents Content search results. Use the Select button to review the content record. Courses, Classes, and People can be reviewed similarly.

Search results are depicted below:



2.5 Master Class, Resource and Activity Schedule

The master schedule provides an illustrated view of all Classes and Activities. It is designed to provide a project management tool that allows direct access to the Class, Resource and Activities record system.



As depicted above, the Organization Master Schedule provides a tool for review of all scheduled classes and associated activities. This tool provides advanced scrolling and zoom features to enable the administrator to view various time periods and open or close class objects. The Master Class/Activity/Resource Schedule will load with a collapsed tree of displayed classes and dependent items (resources and activities). This approach makes it easier for clients with hundreds or even thousands of upcoming scheduled classes to view and find information about a particular class.

2.6 Forms

KMx data entry forms are generated by the KMx data system. This approach simplifies maintenance and modification of forms and form items. The button selections at the bottom of each form perform the following:

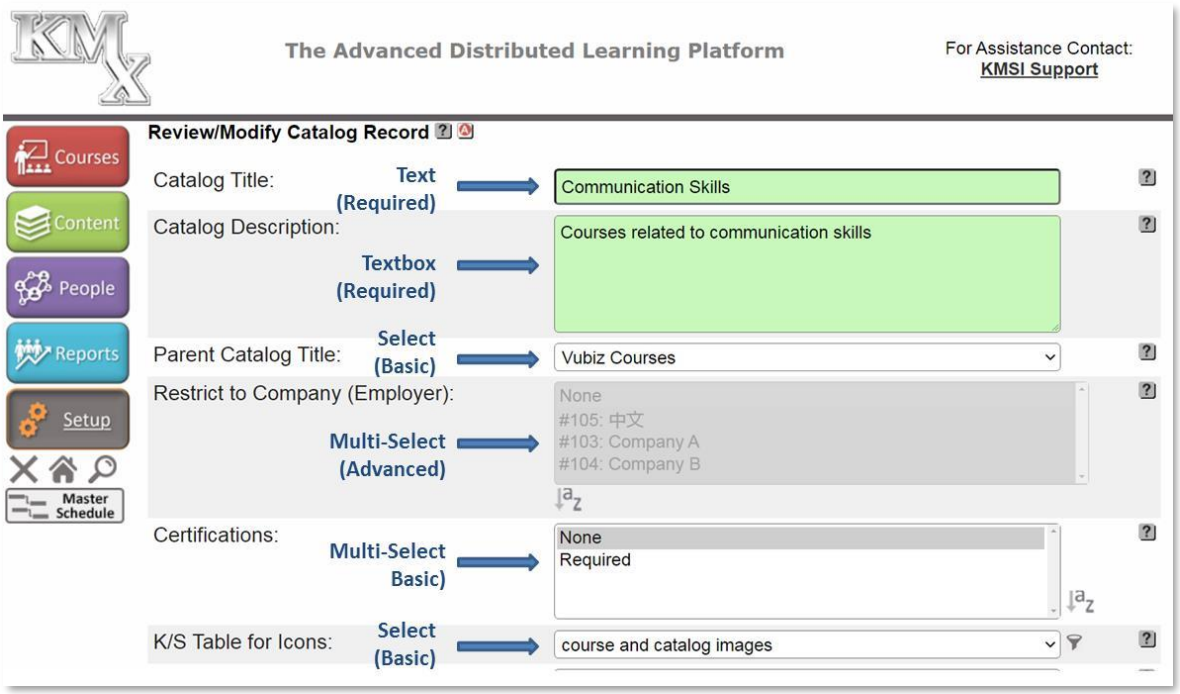
Form Button	Button Function
Done	Saves the record and returns the user to the Main Menu
Return	Saves the record and returns the user to the previous Form
Copy	Creates a duplicate of the record for immediate editing
Delete	Deletes the record and returns to the previous menu option
Refresh	Saves the record and updates any relationships to other records in the data system
Sequence	Enables sequencing of the selected information

2.7 Basic Form Items

There are several types of basic form items, each with a special function as described in the following table:

Form Item Types	Form Item Function
Display	Displays text information, but does not permit changes
Text	Displays text information and allows changes
Text Box	Displays lengthy text information and allows changes
Select	Display drop-down lists for element selection
Anchor	Displays "Click Here" button to launch editorial popup windows
Date	Display date information for editing

The ? icon to the right of each form item provides additional information regarding by hovering the curser over it.



2.8 Advanced Form Items

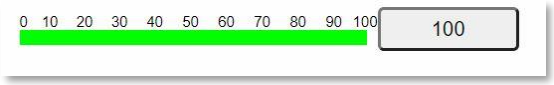
In addition to the standard form item controls, KMx includes a number of advanced form item elements that are used for specialized data entry and display of information on a form.

2.8.1 Slide Control

The Form Slide Control was created to enable easier entry of fixed range numeric values. To change a value on a form using the slide control, simply drag the blue slide element to the desired value. If the value button is highlighted (not grey), then further information is available about the element by clicking on the value button.

2.8.2 Indicator Control

The Form Indicator Control was created to provide a graphical display of progress or completion percentage information on a Form. The control does not allow the value displayed to be changed. If the value button is highlighted (not grey), then further information is available about the element by clicking on the value button.



2.8.3 Filter Control

The need for Forms to filter items to enable ease of selection has been an element of KMx Forms since our initial release. Most form filters are K/S Table dropdown lists that enable other form elements to be selected based on the K/S Table selected. Another example of the use of a Filter Control is the use of personnel classifications to limit the number of users on a dropdown list to only those users in the selected classification. The addition of the Filter Control icon to the Form elements that are performing filter functions was designed to make it easier for developers and administrator to know which Form elements were performing filter functions.

2.8.4 Auto Refresh Control

Numerous forms contain options that are so extensive that they require the ability to refresh based on selections within the form. If a form item is designated as a key form element that controls other selection and/or options on the form, the Auto Refresh Control indicator will be displayed to indicate these items. An example of this element is the ecommerce options on the Course record. If ecommerce is disabled for the course, then there is no need to display the various pricing, coupon, and payment options. This approach simplifies the administrative data entry on the form and ensures that interlocked elements cannot be selected to create a conflict. Changes to a form item with this indicator will cause the form to reload with revised selections based on the change(s) to the Auto Refresh Control Element.

2.8.5 Multi-Selection with Sorting Control

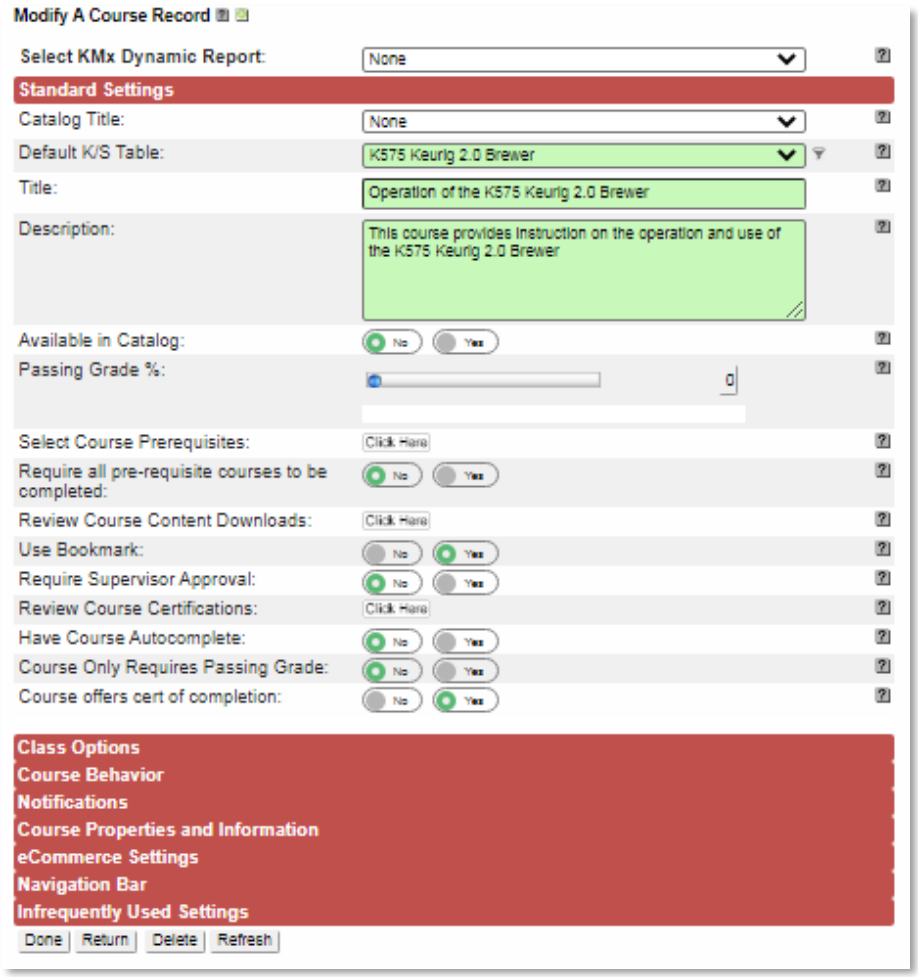
Numerous forms contain drop-down selection lists that enable more than one selection. For a long list of items this can make the selection process difficult because the administrator may have to scroll to select all of the elements required and not be able to see on one screen all of the elements that have been selected. An example is the list of courses that are prerequisite requirements for another course. In order to simplify this process, we have added the Multi-Select with Sorting Control. To use this control, simply select the items from the dropdown and then press the icon to sort the list to indicate the selected items and unselected items. You can use the CTRL Key to select additional items without resetting the items already selected. You can use the SHIFT key to select a range of items.

2.8.6 Drop-Down Control Key Seeking

Many users familiar with standard browser drop-down controls and used to being able to press a key on their keyboard to automatically seek the first item in the drop-down that begins with the keyed character. In KMx, all drop-down items are numbered to make identification of elements easier. This numbering approach makes the use of the keyboard to seek the first element impractical (since the first character in a KMx administrative drop-down is always a number). In order to enable both the identification numbering and the ability to use the keyboard to seek to the first keyed item in a dropdown, KMx V8 incorporates a revision that allows both approaches to co-exist in a dropdown. This capability does not extend to Auto-Refresh Controls or to Filter Controls, both of which would refresh the form based on a change in selection by the administrator.

2.9 Form Item Groups

The KMx Forms Engine has been updated in KMx V14 to enable administrators to toggle form sections to open/close. By default, a form with section headers will display with the Standard Settings section open and the optional/advanced sections closed. This approach is designed to facilitate entry and selection of standard/required elements and group optional/advanced elements into form sections for review and modification as needed.

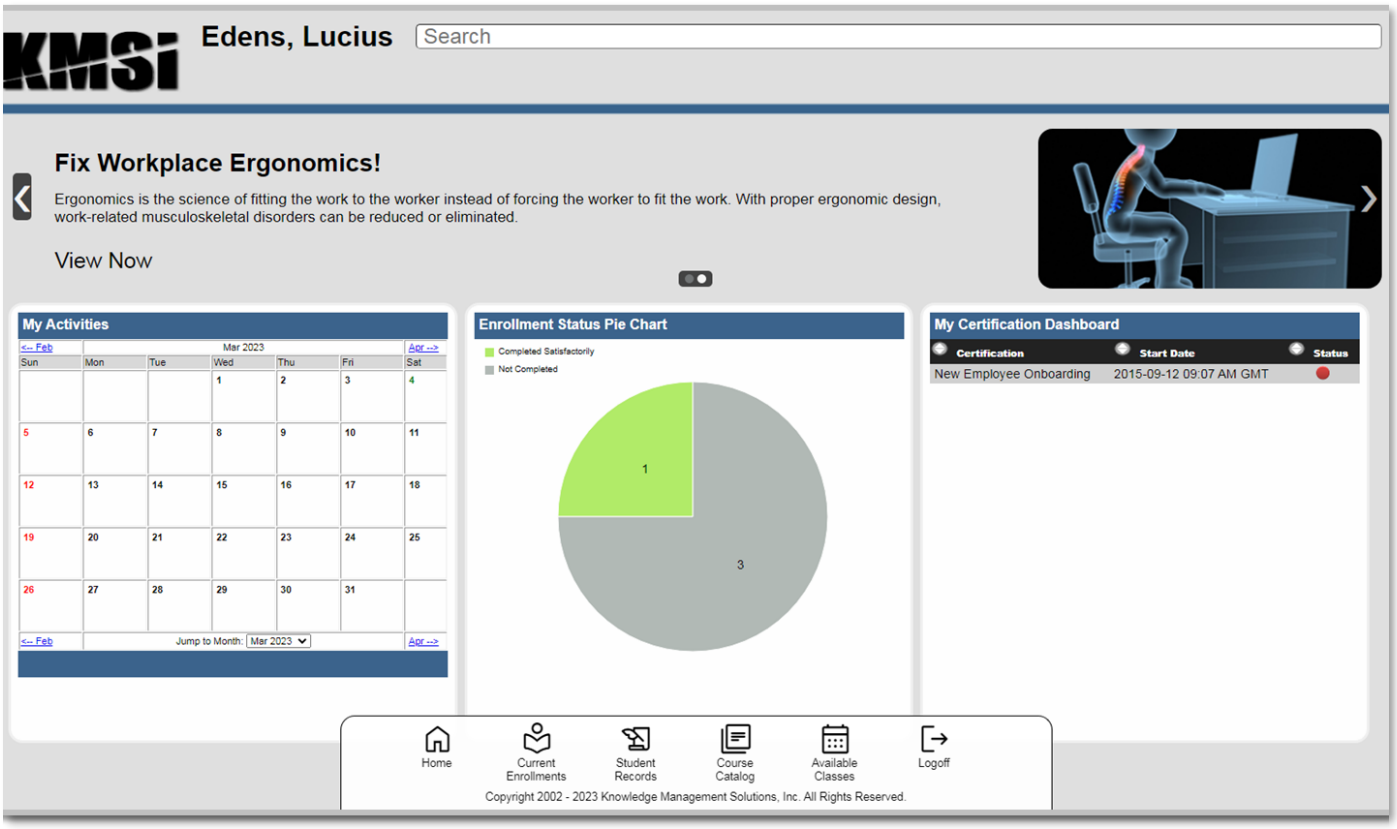


Open Section Header

Closed Section Headers

3 KMx Student, Instructor, Supervisor Interface

The KMx user interface was designed for easy customization and branding and is available with language packs to provide for localization and multilingual distribution. The interfaces are also supported by a complete web-services kit for Intranet or custom portal integration.



KMx provides a default Student/Instructor/Supervisor interface kit that is based on HTML5. This approach presents a clean and user-friendly interface for end-users and is easily branded with client custom graphics and style sheets. For an example of the default interface kit, please visit www.KMxDirect.com.

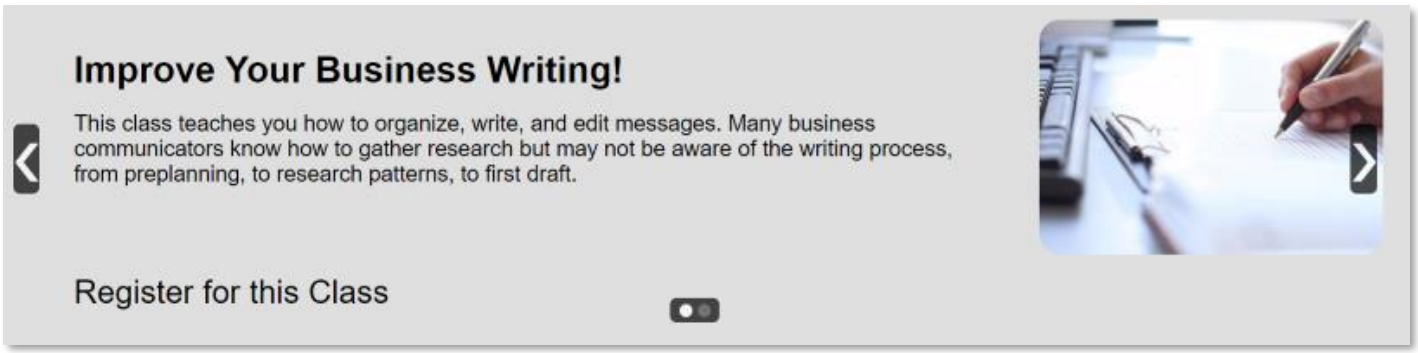
3.1 Home

KMx version 15 includes significant updates to the student/instructor/supervisor interface. The new v15 Home page (see image above) contains client configurable user interface elements including customizable widgets and announcements/advertisements. The Home page can be configured to display class/schedule, report, map, form, course/content, social media, and client-generated widgets. Standard role-based widgets provide additional access and information to Supervisors, Instructors, and Company Administrators.

Member information is available for review by selecting member name from the header (see image above). A variety of configurable reports are accessible from the member information form and are filtered to display results for the selected member.

3.1.1 Announcements

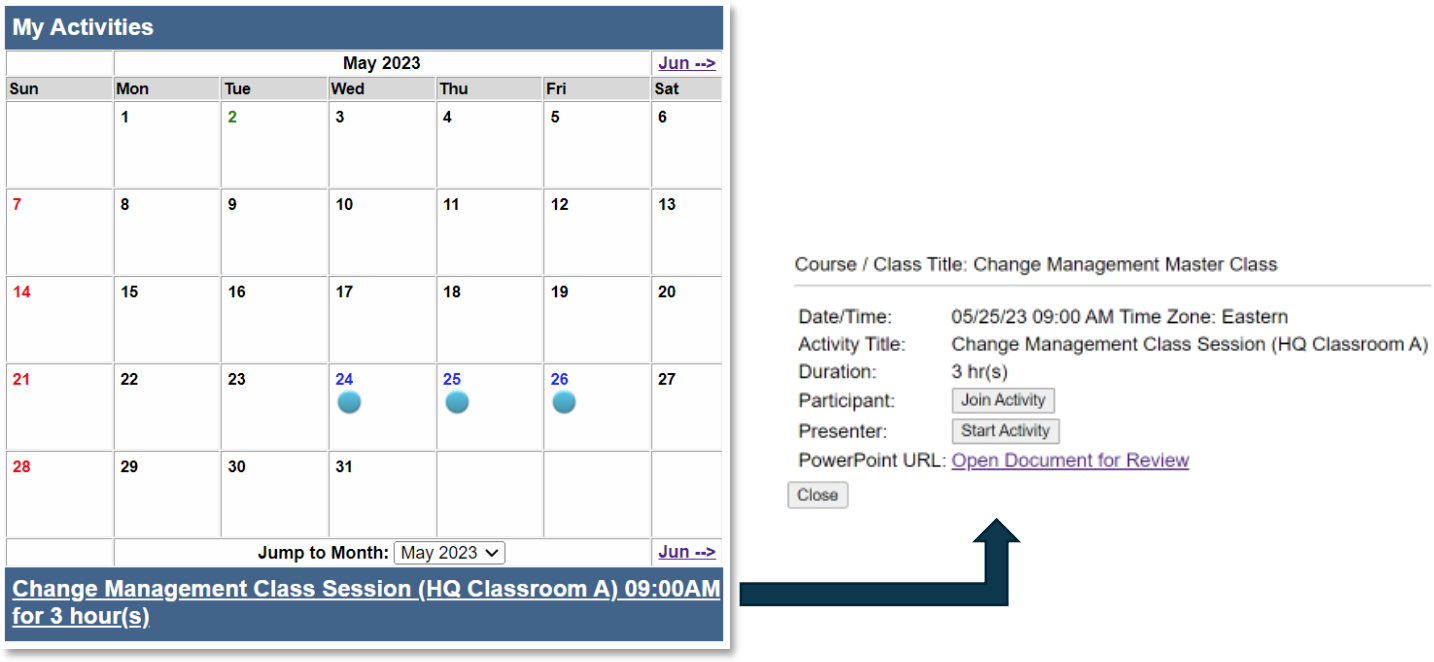
Home is configured to display customizable announcements including imagery and links to Content, Courses, or external URLs. Announcements are managed from the Site Configuration dropdown on the Setup tab. Start and end date can be selected to ensure an announcement is available during a specified window. The carousel of announcements will automatically rotate, but users may also select the navigational arrows to advance.



3.1.2 Student Activity Calendar

Clients that leverage KMxLive and/or use Class Activities to schedule events associated with a class can provide the user with a personalized activity calendar. The Student Activity Calendar provides links to access content and/or retrieves additional information regarding a scheduled activity.

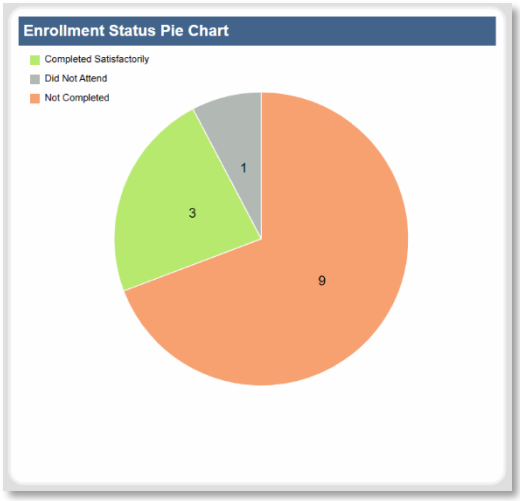
Colored indicators provide additional activity details when clicked. Virtual events, like KMxLive, can be accessed from the student's activity calendar by selecting the colored indicator, then clicking the Activity link below the calendar (see below).



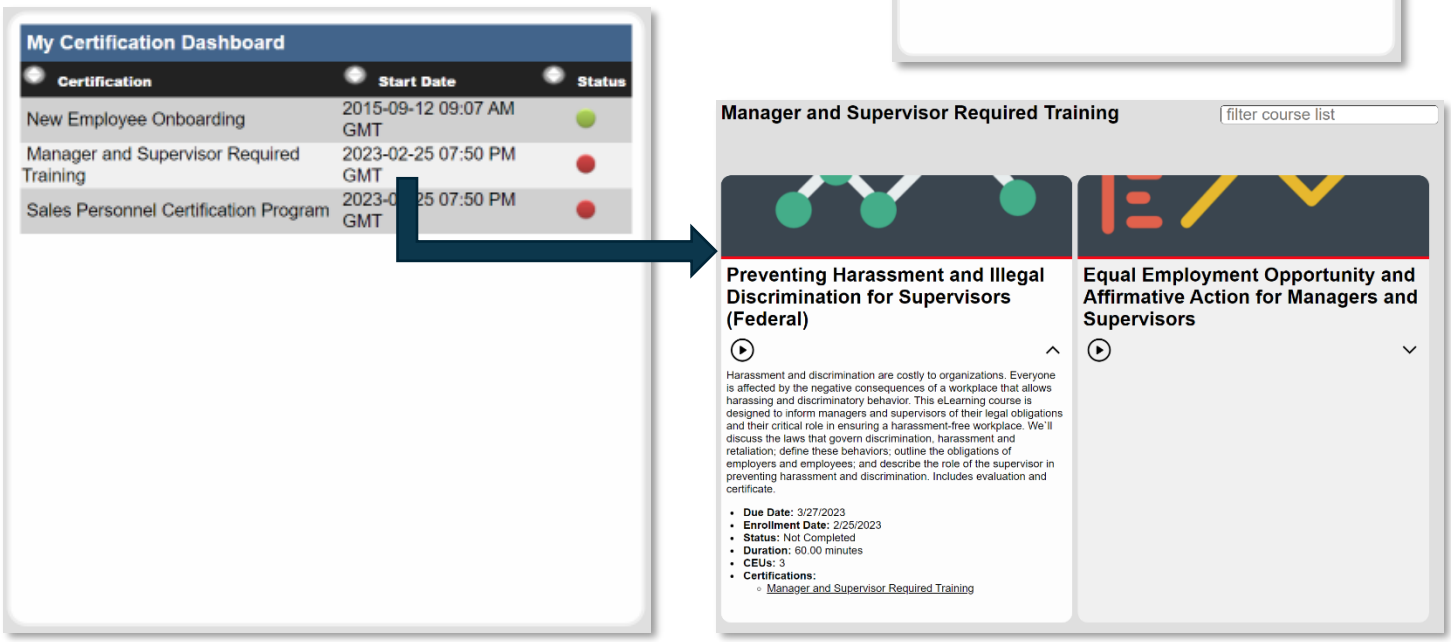
3.1.3 Report Dashboards

Dynamic reports, graphs, charts, and maps are available interactive display widgets. Results displayed can be configured to reflect the logged in user's role/permissions. Additionally, reports support drill-down and linking so that further details can be accessed in context of the original report.

An enrollment status pie chart is depicted on the right. It provides a dynamic chart that reflects the logged in user's course completion statuses.



The image below shows a certification completion summary developed with KMx Dynamic Reports. Color-coded status indicators allow users to quickly identify delinquencies and completions. Each row in the report is clickable and navigates the learner to their Assignments page where they can review additional course details and/or launch a course.



3.1.4 Supervisor Dashboard

The KMx security and session management system can identify Supervisors and enable clients to delegate both administrative and reporting options via the Student/Instructor/Supervisor Interface. The "Is Supervisor" option on the Member record determines if the user is provided with the Supervisor dashboard. The "Is Supervisor" option is set to "Yes" when an imported or synchronized user record identifies another user record as the supervisor.

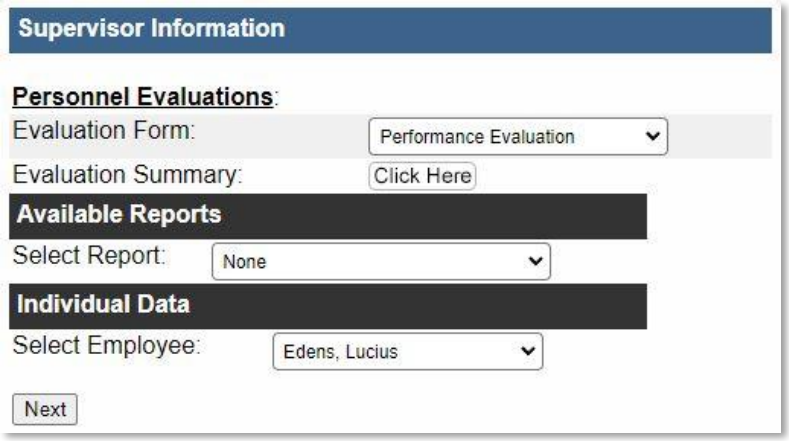
There are three methods for identifying member/supervisor relationships to enable supervisor access to subordinate information:

Member Supervisor ID – Under Administer Personnel, Review a Member Record, the KMx Member ID of the current Members Supervisor can be set manually via a dropdown menu.

Supervisor Directory Services ID - During a batch user import or synchronization with a HRIS or payroll service, the Directory Services ID of the Supervisor for each user record can be provided.

Member Company Mask – A string that represents the organizational hierarchy position for each individual is calculated during a daily batch process. This string is the KMx Member ID with a dash for each user in an organization in the supervisory chain until no additional supervisor can be identified (i.e. the CEO or president.).

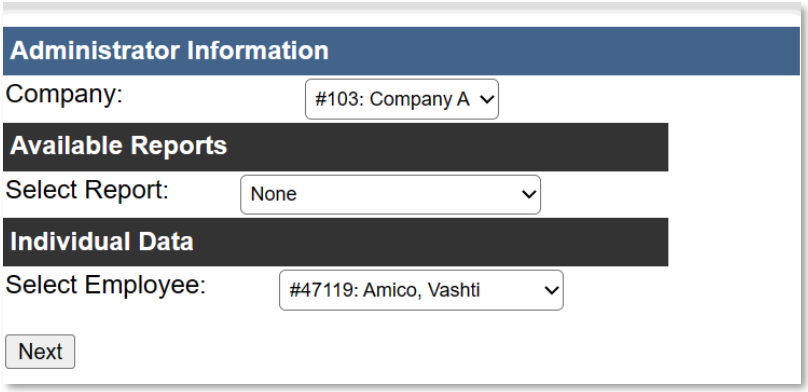
Individuals flagged as Supervisors have access to a Supervisor Information dashboard that includes personnel evaluations, subordinate drill-down information, and a variety of reports pre-filtered to the Supervisor's role.



3.1.5 Administrator Dashboard

The KMx security and session management system can identify Company Administrators and enable clients to delegate both administrative and reporting options via the Student/Instructor/Supervisor Interface. Company Administrators are assigned via Setup, Review Member Authorization Level. A Company Administrator (Member Authorization Level #10) is able to review and administer personnel within a designated Company (see Site Hierarchy topic above). Setup of the Company Administrator option is normally accomplished during initial site setup; however, a trained customer support representative can add or remove administrative and reporting options from the Company Administrator access form(s).

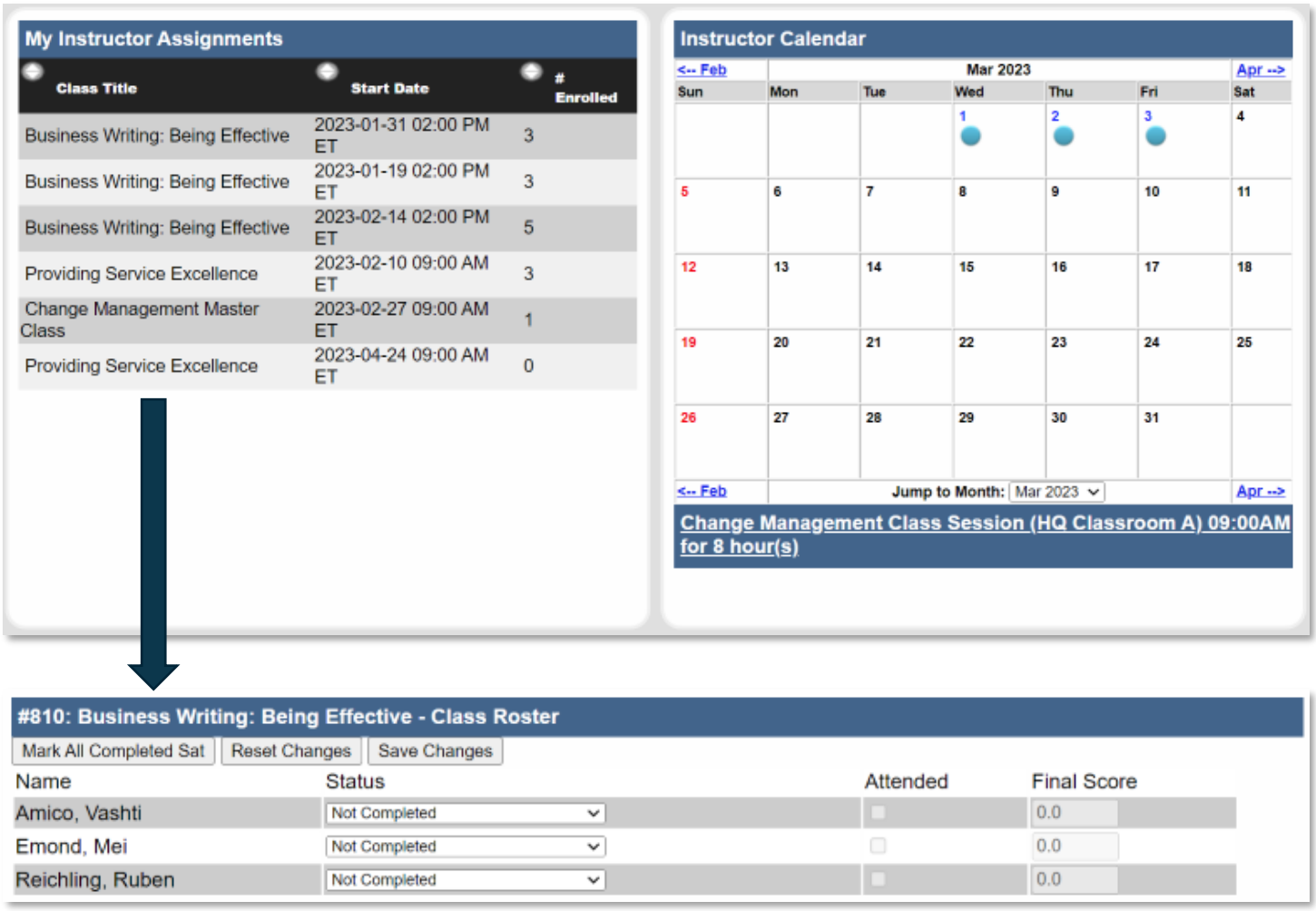
Individuals flagged as Company Administrators have access to an Administrator Information dashboard that includes company member drill-down information and a variety of reports pre-filtered to the Administrator's company.



3.1.6 Instructor Dashboards

The KMx security and session management system can identify an Instructor to enable clients to delegate both administrative and reporting options via the Student/Instructor/Supervisor Interface. Use the "Qualified Instructor" field on the member record to indicate Instructor status. Enabling this setting allows the member record to be associated to an Instructor Resource record (see Section 5.2.2). During class setup, the Instructor can now be utilized as a scheduled resource.

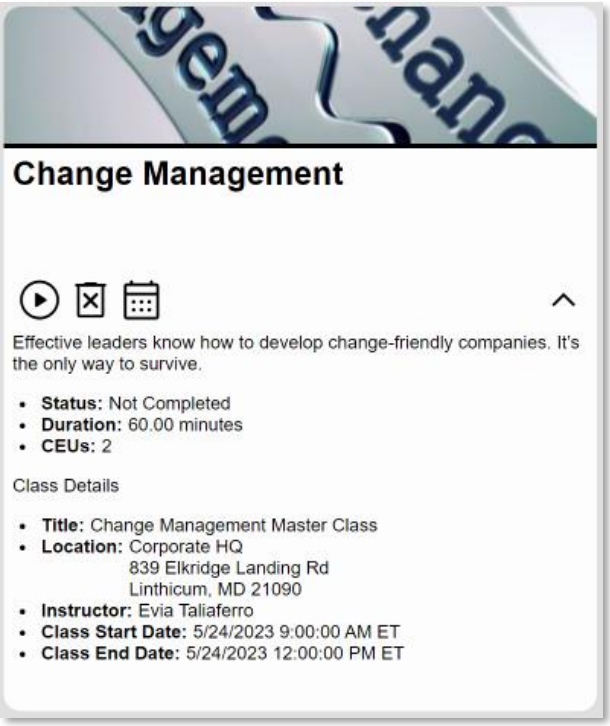
Instructors have access to the dashboards depicted below. On the right, Instructors can review their class schedule via the Instructor Calendar. Instructors can use the calendar to start/access virtual events, like KMxLive. My Instructor Assignments (left) provides a report of the instructor's scheduled classes and the number of enrollees. Selecting a class from the report produces an administrative class roster where individual attendance, status, and score can be selected.



3.2 Course Cards

Students can review course/class information and manage enrollments from a variety of Course Card views, including Current Enrollments, Student Records, Catalogs, and Assignments. Course Cards are customizable

and include a course image, description, meta data, and action controls. Each card is expandable to review additional details.

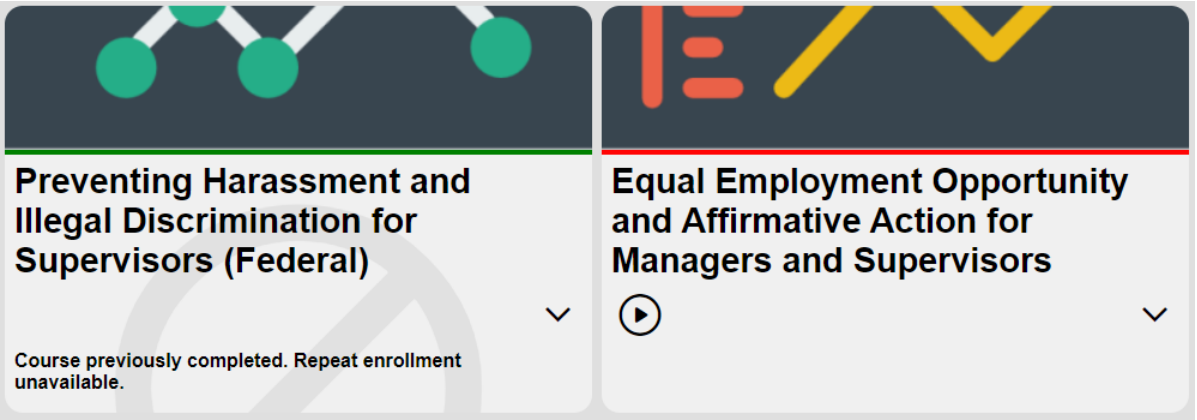


The expanded Course Card depicted on the left reflects a user's current enrollment. Course content can be accessed from the Launch icon, associated activities viewed from the Calendar icon, and the enrollment deleted from the Delete (trash) icon. If the course requires a class, applicable class details are provided.

The Course Card below depicts the view from Student Records. Students are presented with options to print a completion certificate, share on social media (if enabled), and review additional details by expanding the card.

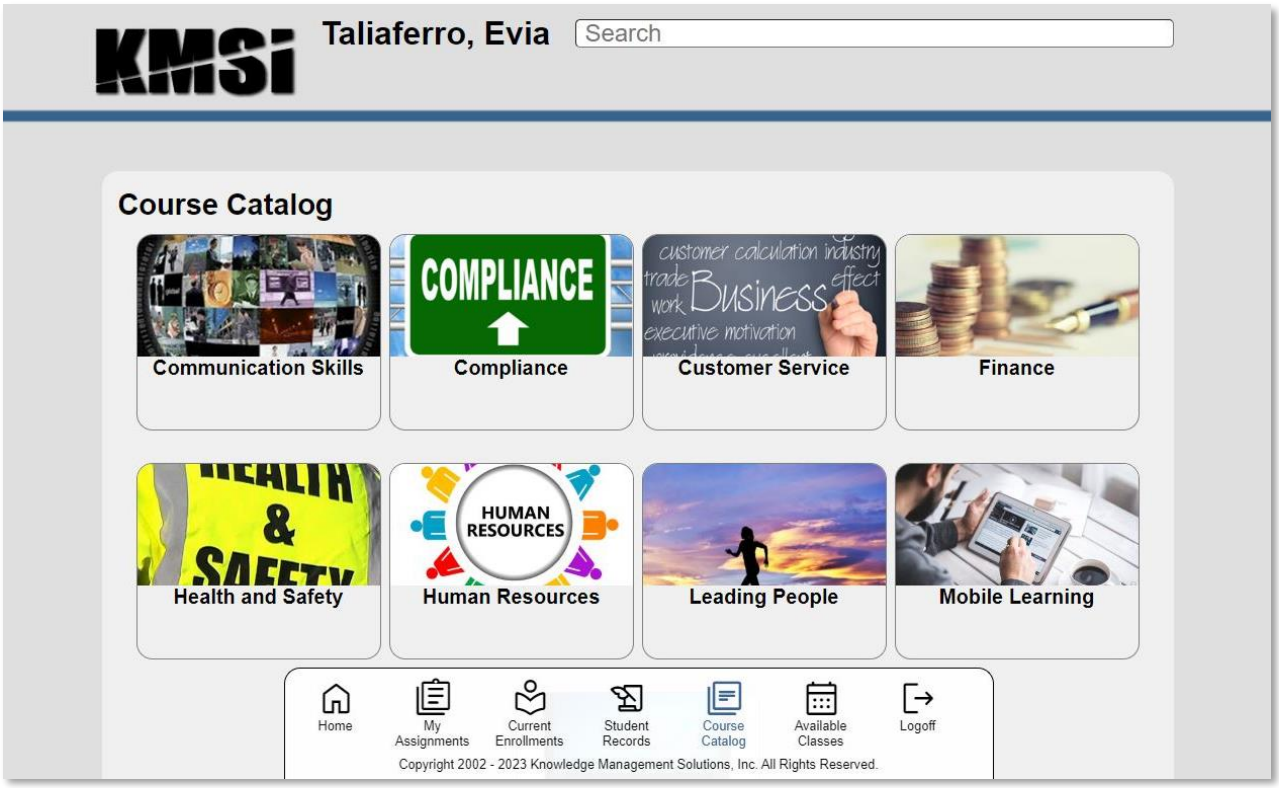
Course Cards can display color-coded assignment status including Due Date and applicable Certification(s). The lower-right image depicts an overdue assignment as indicated by the red status.

The lower-left image reflects a completed assignment that's ineligible for re-enrollment due to a course setting that prevents duplicate enrollment.



3.3 Catalogs

KMx provides numerous catalog options, including the ability to restrict catalogs to a user's company, personnel category, and company type. Catalog can be nested to any number of indentured levels. Courses can be resident in one or many catalogs depending on the site configuration. See System Administration, Catalog Setup for additional information.



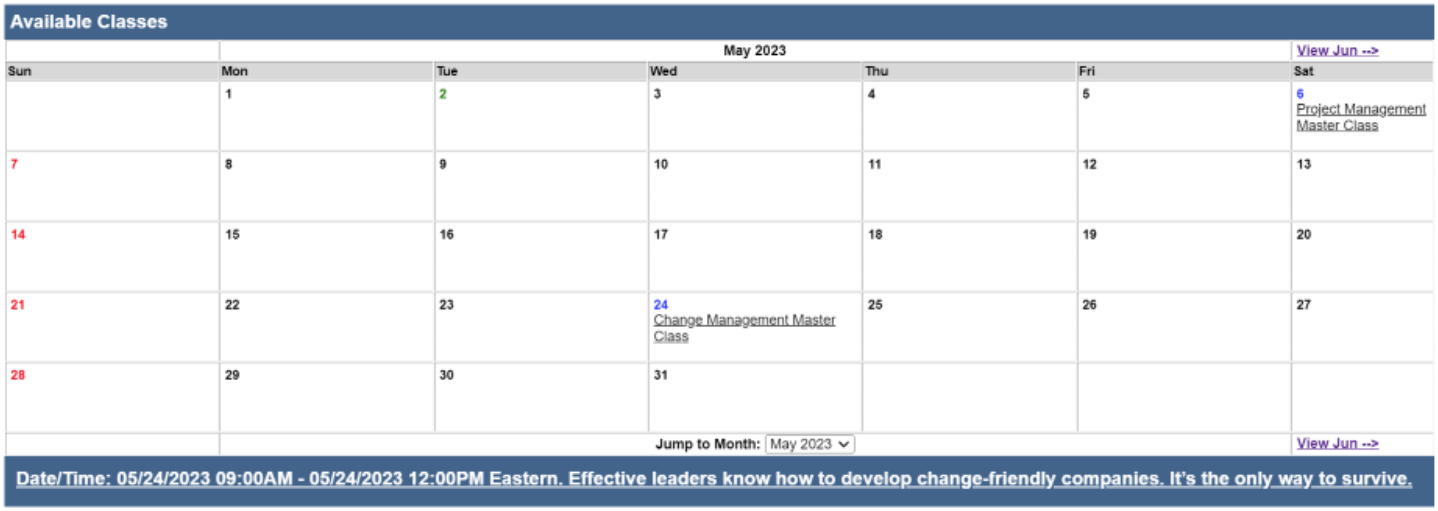
Courses that have scheduled class convenings will display the following information to assist the user with selection of an appropriate class:

Class Title	Start Date	End Date	Total Seats	Currently Enrolled	Waitlist Available	Format	Category	Location	Address	City	State	Zip Code
Providing Service Excellence	2023-03-24 09:00 AM ET	2023-03-24 07:00 PM ET	6	2	No			Corporate HQ	839 Elkridge Landing Rd	Linthicum	MD	21090
Providing Service Excellence	2023-04-24 09:00 AM ET	2023-04-24 10:00 AM ET	6	0	No			Corporate HQ	839 Elkridge Landing Rd	Linthicum	MD	21090

All enrollment selections can require supervisor approval based on course setup (see Course Record Options). Classes can be further restricted to companies or company types (see Site Hierarchy description above).

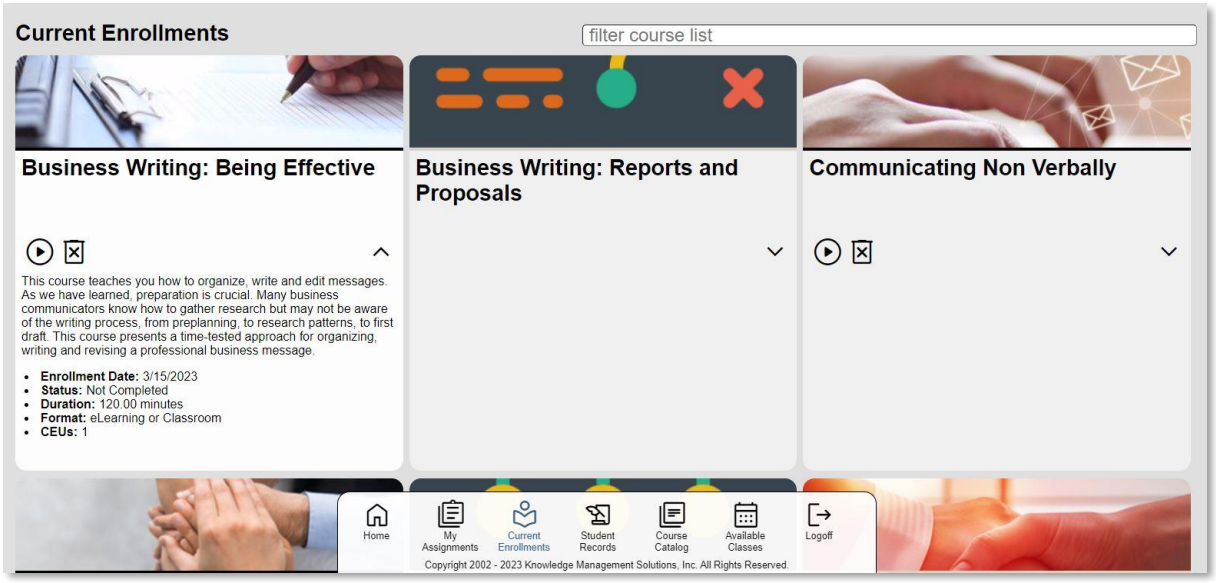
3.4 Event Calendar

The Event Calendar provides a calendar of upcoming training events and seminars restricted using the catalog assignment logic (see Catalogs, under System Administration). Use the month-to-month navigation links at the bottom of the calendar to review and enroll in upcoming events.



3.5 Current Enrollments

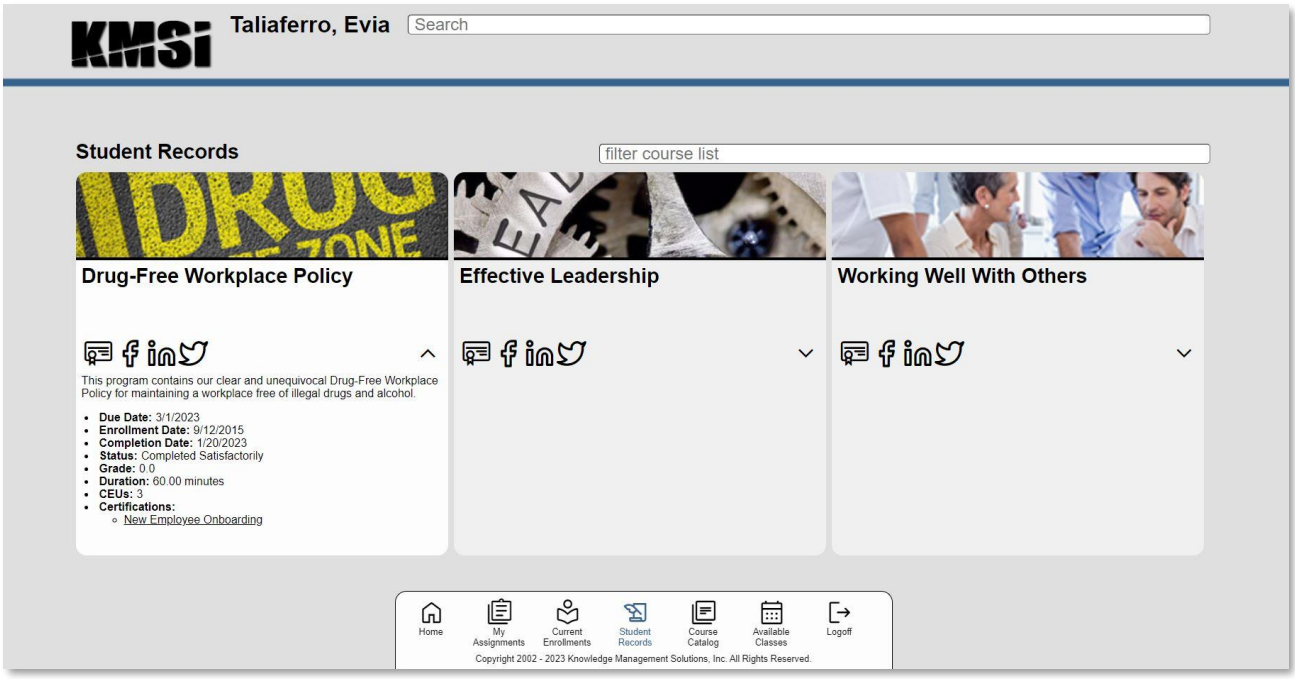
The current enrollments page provides the user with access to courses and classes where a current (not completed) enrollment has been established. The user can launch eLearning courses, delete eligible enrollments, and review additional course/class information in the course card's expanded view.



3.6 Student Records (Transcript)

The Student Records page provides the user with a complete transcript of completed courses/classes. The page also allows the user to produce a certificate of completion, access to grade book information, and the

ability to review content from completed courses (not for credit). An optional KMx administrative setting disables course launch from the Student Records page or access can be controlled on a course-by-course basis.



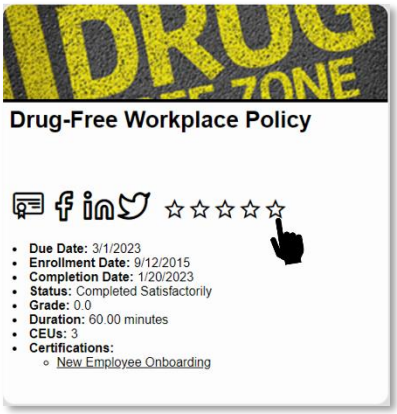
3.6.1 Certificates of Completion

During site setup, most clients design a custom completion certificate format to be used to award certificates to users from the Student Record page. The certificate is a PDF that is dynamically populated with user and enrollment information.

3.6.2 Social Media Sharing

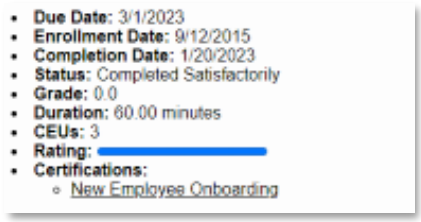
Optional settings permit sharing of courses on Facebook, Twitter, and LinkedIN. Review Organization Information on the Setup tab to enable/disable social media sharing. Social media sharing can also be independently controlled at the course level.

3.6.3 Rating



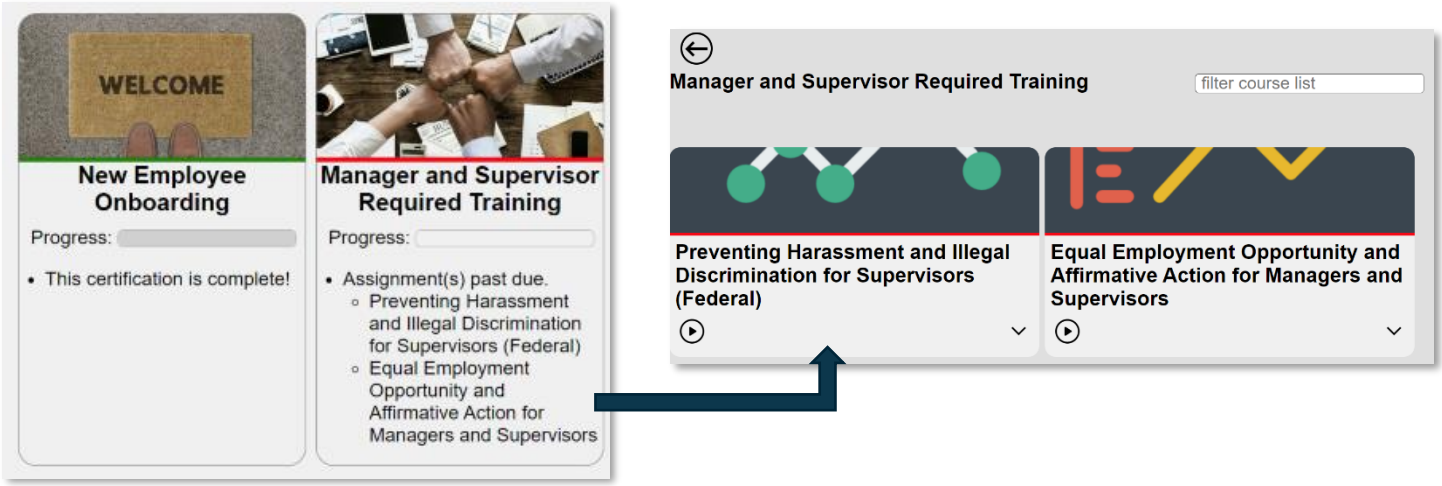
The site setting to enable/disable the rating of courses is accessed from Review Organization Information on the Setup tab. When enabled, courses can be rated via the Student Records course card view (see left image). A course record setting determines if a course is eligible for rating.

Course ratings are visible in the expanded course card view (right) and represent the average course rating.



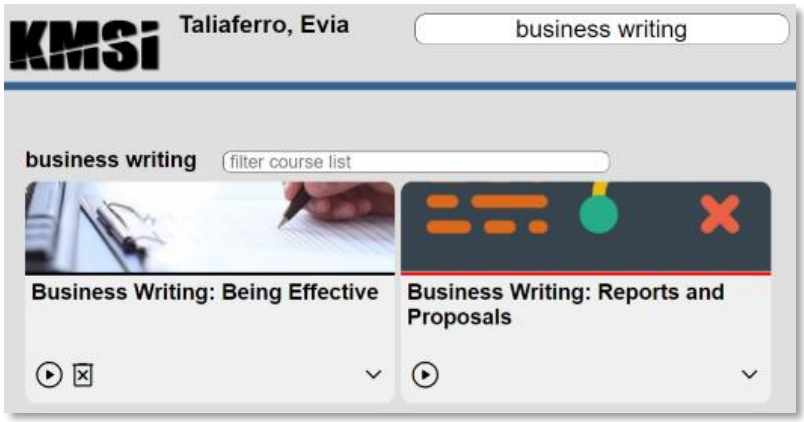
3.7 Assignments (Certifications)

Students can review their required assigned training, or certifications, from the Assignments page. Each assigned certification includes a progress bar and color-coding to easily identify completions and delinquencies. Select a certification to view the course(s) required for assignment completion.



3.8 Course Search

A persistent Course Search is accessible from the site header. Search criteria includes course title, description, keywords, course unique identifier, or foreign catalog key.

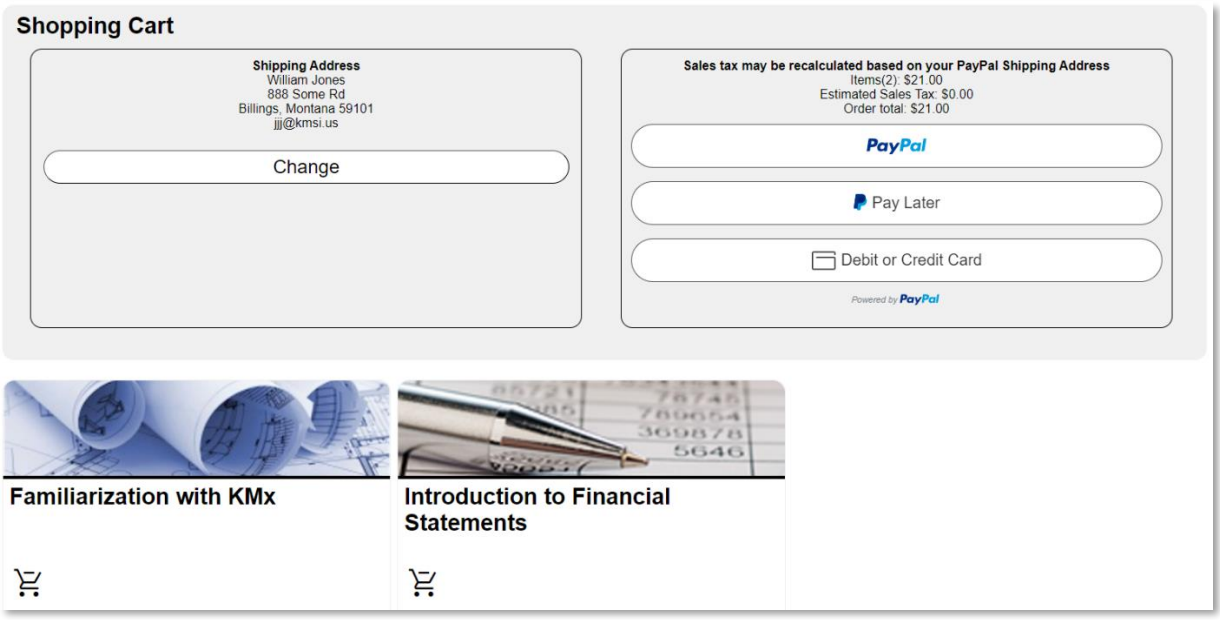


3.9 Shopping Cart

eCommerce enabled sites include a Shopping Cart menu item for processing course/class purchases. Review section titled eCommerce Options to learn more about setup.

Use the Add to Cart icon (left) to begin the purchasing process. Use the Remove from Cart icon to remove a course from the shopping cart (see image below).

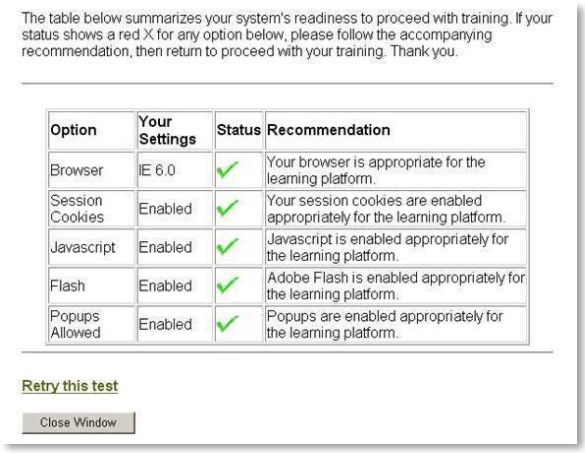
Select View Cart from the menu to review Shopping Cart options (below). Since billing address may vary from the user's member information, select Change to revise billing information. Once all items have been added to cart, select the appropriate payment method to finalize the transaction.



3.10 Browser Test Tools

KMSI offers our hosted clients access to a browser test utility to ensure that their user's browser is ready for use with the site.

While KMx has no browser, plug-in or user operating restrictions, many customers incorporate technologies like these into their learning content. Providing the test tool to ensure that users have the required plug-ins can significantly reduce the customer service issues experienced by end-users.

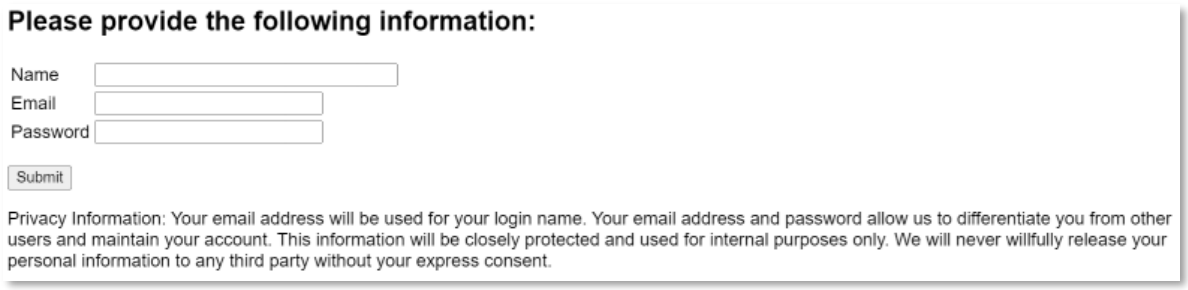


3.11 FAQs and Help Screens

Many clients develop an FAQ to provide users with answers to frequently asked questions related to the site. The Home screen's flexibility enables clients to generate custom widgets such as FAQ or Help.

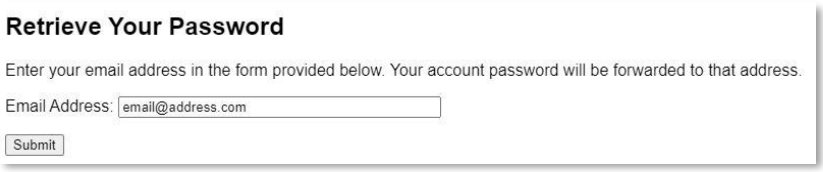
3.12 User Registration

Clients that allow for user self-registration will offer a registration form (usually designed during site setup) to capture the information required to provide the user with site access and provide a mechanism for creation of the user's login name (screen name) and password.



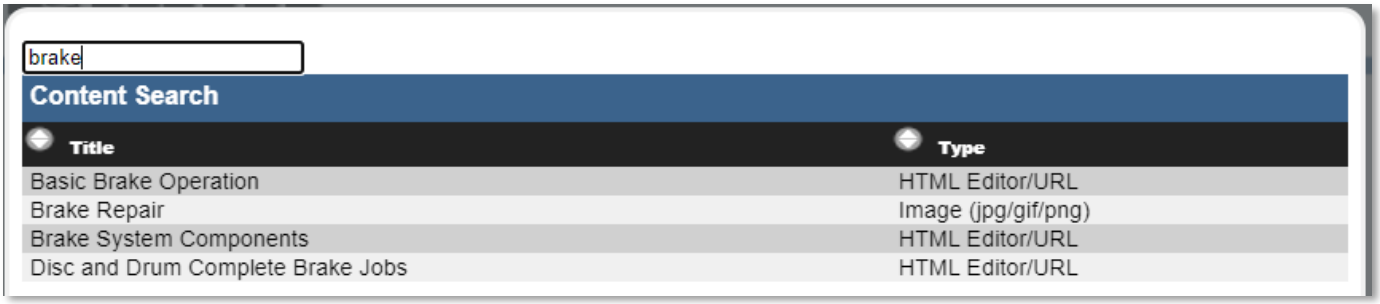
3.13 Lost Password Utility

Sites that provide for user login (instead of requiring access via a single sign-on method) normally provide the user with the ability to retrieve their password via email.



3.14 Student Content Search (Just-in-Time Training)

Many clients organize their content into libraries using the K/S Table architecture. Content items that are useful for just-in-time training or other performance support can be searched using the Content Search report. View member information by selecting member name from the site header, then select Content Search from the Available Reports dropdown. Input a search term and select a result to review content. Note that content is suppressed from search unless specified on the content record. Disable the option to mask from content search results if the content is eligible for search. When enabled, all content is searchable except for KMx exams.



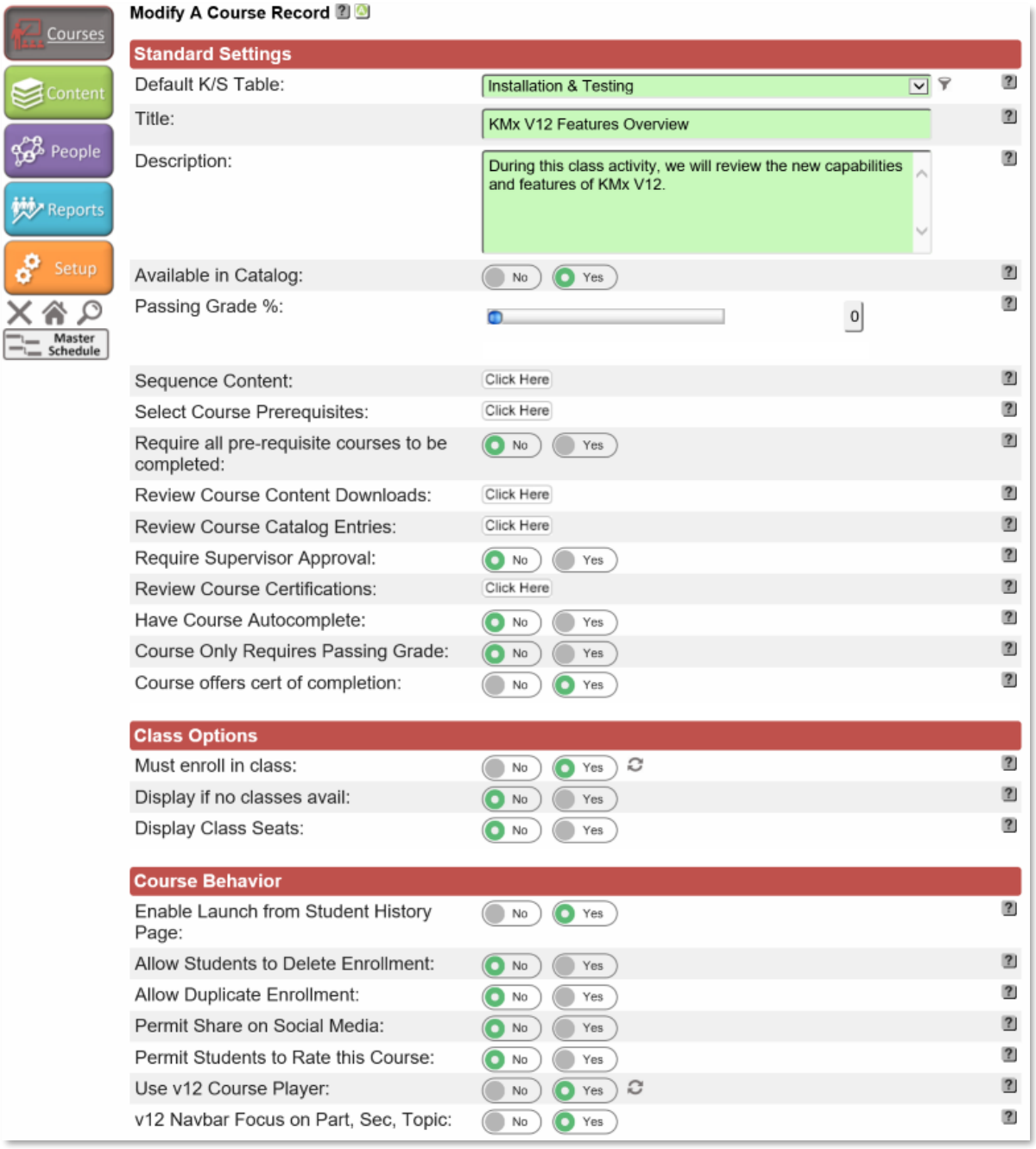
4 Courses

In KMx, Courses are a primary data element. Course Records provide the definition of what the course consists of, including the association of course content (lessons), eCommerce information and course execution parameters (passing score, Course AutoComplete, etc.).

4.1 Course Records

Development of a course within KMx requires the creation of a course record. The course record captures title and descriptive data as well as provides numerous options for course presentation and display options. From the main menu, select Courses to Insert a new Course Record. The Course Record provides overall course level information and meta-data for a course.

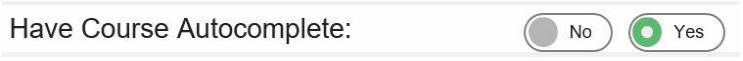
There are numerous options associated with the course record that will assist you in tailoring your offering to your students.



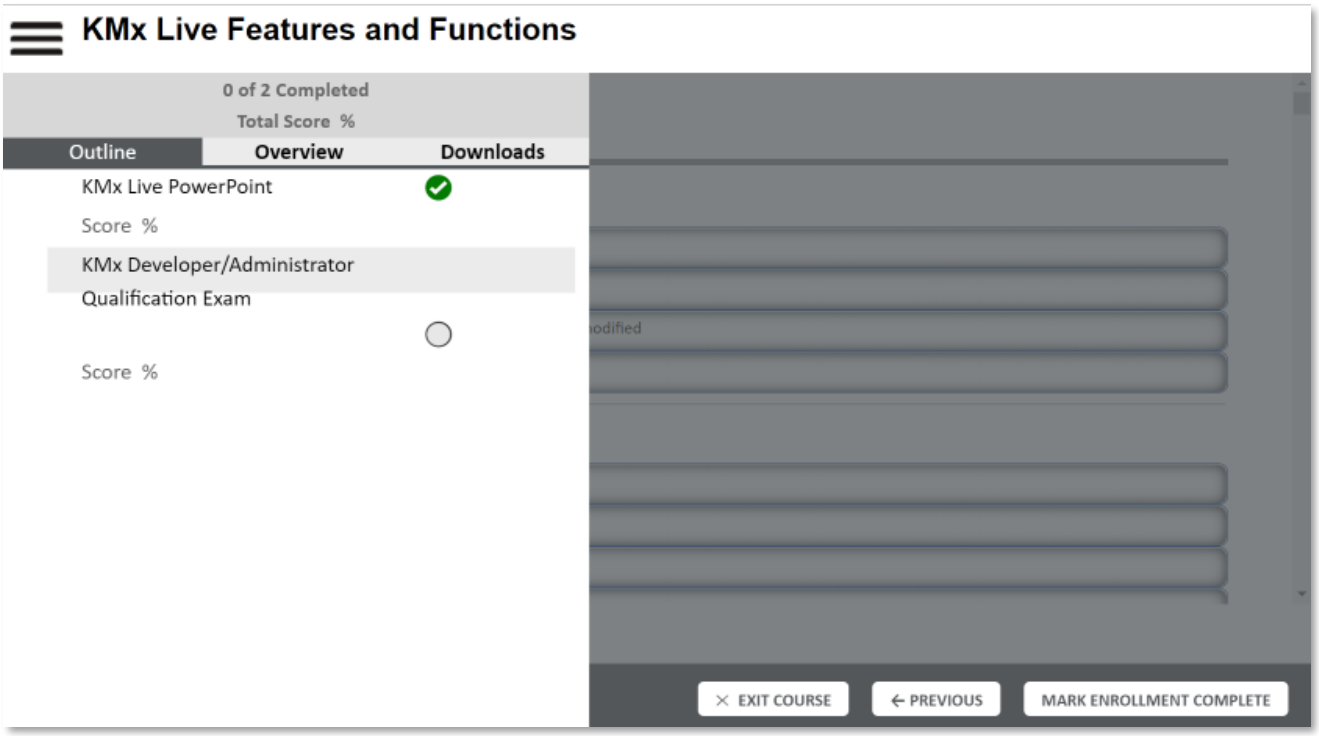
We suggest you try different combinations of the options provided prior to placing the course in the Course Catalog to determine which combination best meets your needs.

4.1.1 Course AutoComplete

KMx includes capabilities to automatically set the enrollment completion status based on the completion of all SCOs and the availability of retakes for scored SCOs. This setting is optional.



If the AutoComplete Enrollment option is set to "Yes" the system will determine overall enrollment pass/fail status based on all SCOs and all available scored event retake options. If the student has a passing weighted score and has completed all SCOs the result will be "Completed Satisfactorily". If the student has a weighted failing grade and has completed all SCOs, then the result will be "Completed Unsatisfactorily". All other conditions will leave the enrollment in a "Not Completed" state.



4.1.2 Course Universal Prerequisites

The ability to set universal course prerequisites is available in a popup Form to minimize the load times associated with the Course Record Form. The control is a Multi-Select with Sorting Control to make the process of selecting multiple prerequisite courses easy. Unlike the prerequisites established as part of a certification or personnel category continuum, Universal Prerequisites are designed to force a sequence of courses to be completed in a specific order for all users. This new feature is enabled on the Course Record and is activated by selecting one or more courses as prerequisite to the current course.

4.1.3 Completion Reminders

KMx includes up to three timed completion reminders to be sent to the end-user post enrollment unless they have completed the course. This is particularly helpful for clients that have established required training programs that want to automate the reminders for end-users to complete training within a prescribed timeframe. Each reminder can be set to be delivered at any time period available.

4.1.4 Instructor Qualification

KMx provides the ability for clients to create instructor qualification programs and manage instructor scheduling based on qualifications achieved. In addition to the ability to create the certification program a requirement leading to qualification, the administrator now has the ability to enforce the resource

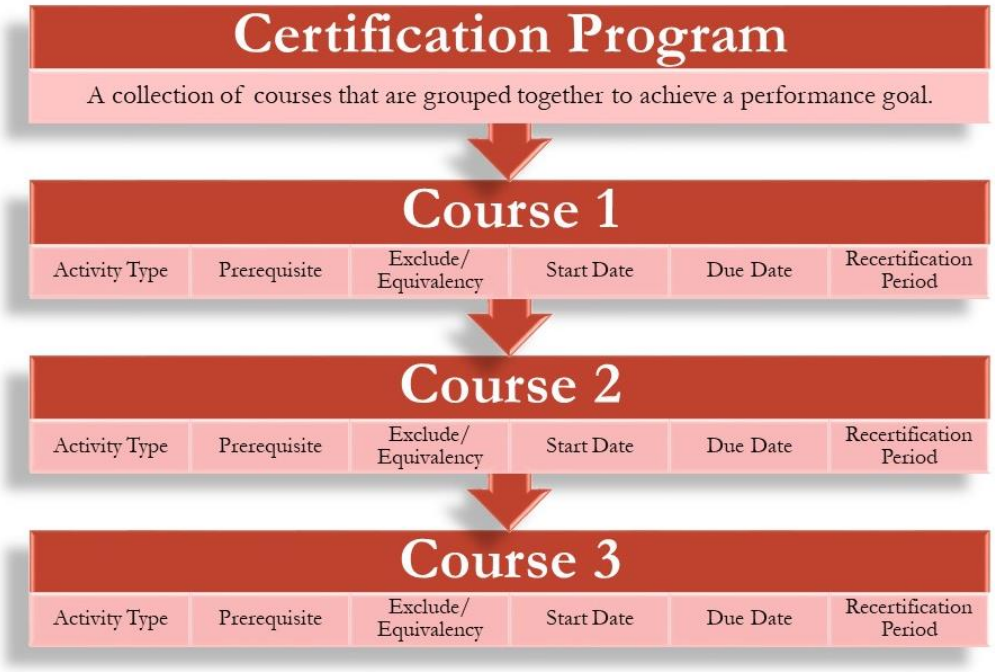
scheduling system to allow only those instructors determined to be qualified to be scheduled. On the Course Record there is an option to "Review Qualified Instructors". This option presents a list box control to add/delete and edit instructor qualifications for the course. On the Setup tab, select Review Organization Information from the Site Configuration dropdown to leverage the option "Use Advanced Resource Scheduling". If this feature is set to "Yes", then only those instructors that are qualified to teach a particular course will be available for scheduling.

4.1.5 Enable Launch from Student History Page/Transcript

This option provides the ability to enable/disable launch of a course following completion for review purposes.

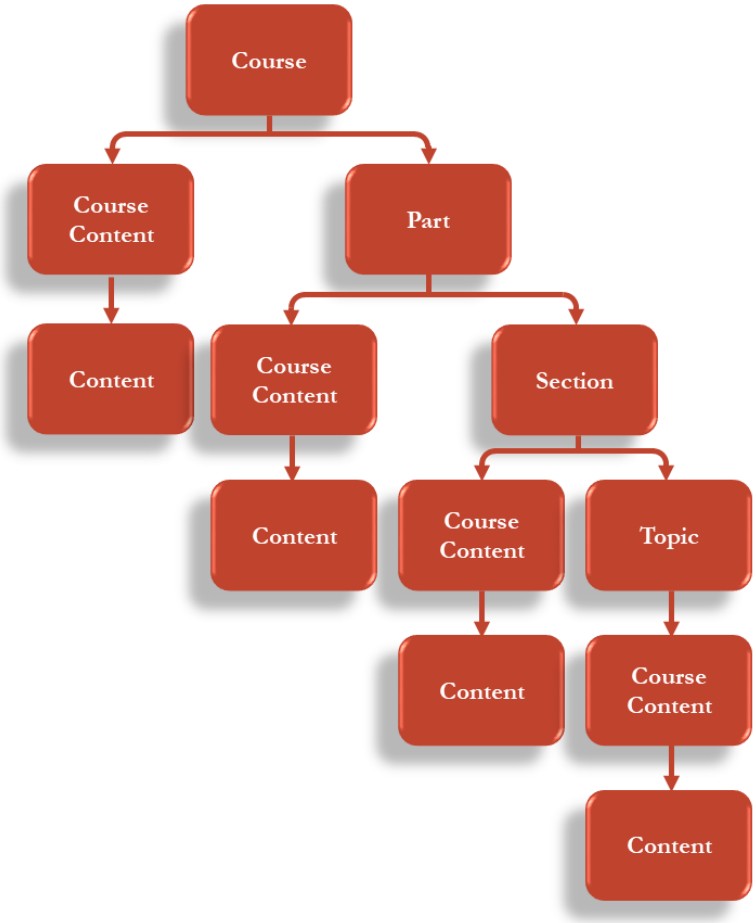
4.1.6 Certification Assignments

A course can be associated with one or more Certification programs. Certification programs are a collection of courses that are grouped together to achieve a performance goal. Each course assigned to a certification can be required or elective, date restricted (start/completion) and can include recertification requirements. For more information on how to leverage this set of features, see the topic titled "Certification Setup".



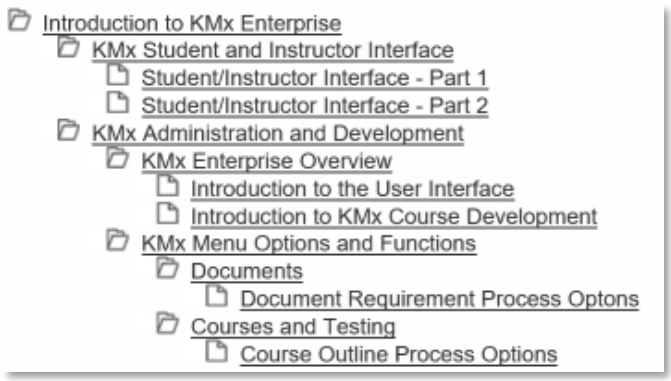
4.2 Course Outlines

Course outlines provide the structure for further course development. Course outlines can be developed by using the Insert options for a Part, Section or Topic. To modify your course outline, select the Review Course Outline option. Course outlines can also document the assignment of objectives within a course and provide the structure for further course development.



4.2.1 Create/Review the Course Outline

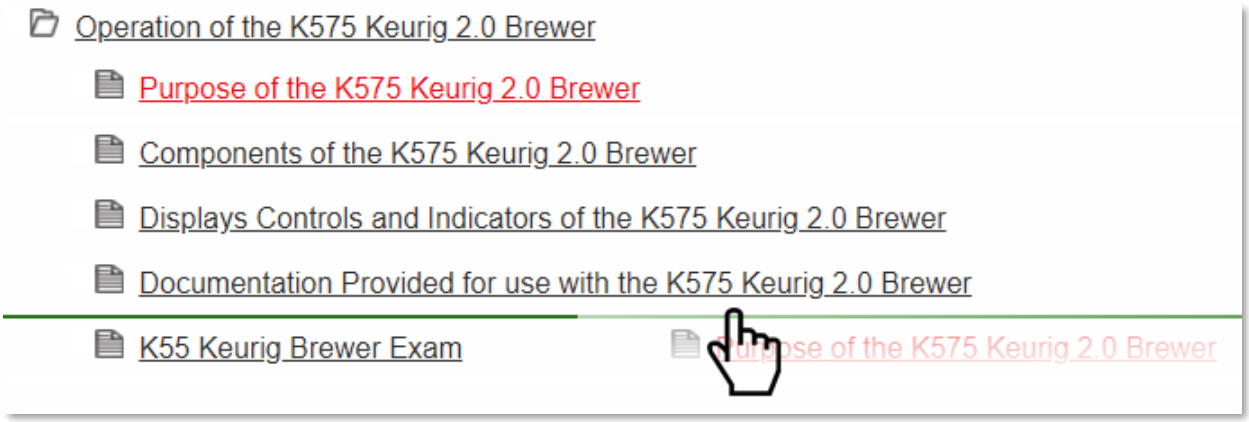
Course Outlines can have up to five levels: Course, Part, Section, Topic, and Course Content. As illustrated on the right, this course utilizes all five levels.



4.2.2 Drag and Drop Course Outliner

With KMx Version 14, the KMx Course Outliner interface has been enhanced to enable drag & drop arrangement of course lesson elements, and up to 5 levels of indentured sub-elements. The course outliner

supports up to 500 total lesson elements per course. To sequence course lesson elements, click-hold and drag the element to your desired location. While moving the element up or down, a green line will appear to indicate the item's new location. Release your mouse button once the course element has reached your preferred placement.

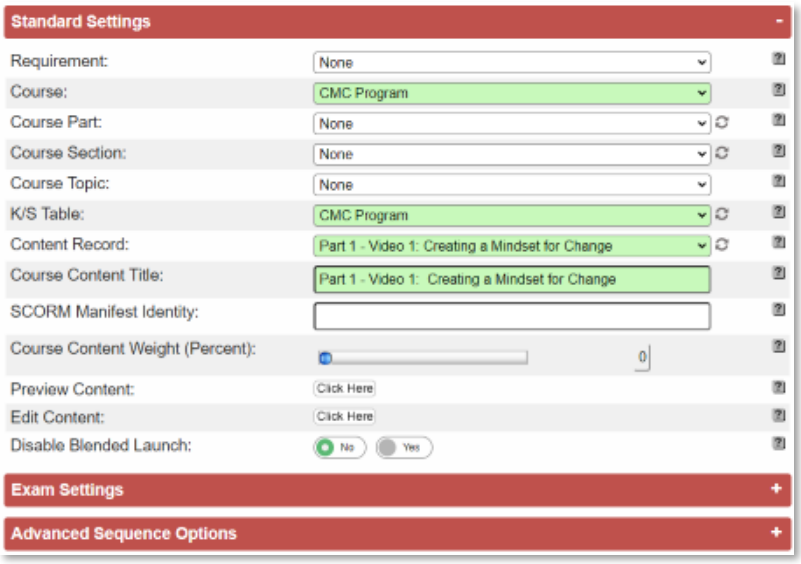


4.3 Course Content

Course content development is accomplished by forming a relationship between content objects and a course outline. Use the Review Course Outline option to view the course outline and assign content objects where Edit/Upload Content appears in the outline. A content record that is Not Assigned indicates that a course content record has been inserted without selection of a content record relationship.

KMx stores content by using a Content Record accessible through the Content tab. Course Content Records are pointers from the Content record to the Course Outline (see above). This approach enables reuse and maintenance of content without duplication. The Course Content Record form (see below) documents this relationship and any other information unique to the use of the content in the current course.

Course content provides the actual instructional materials within your course. Course objectives and requirements provide the goals, course outlines provide the structure and course content delivers the information, testing and remediation to ensure the course requirements are achieved.



In KMx, course content development is accomplished by forming a relationship between content objects and the course outline. Content objects are files that support the requirements of your K/S Table (subject area) and can originate from numerous applications and file formats, including:

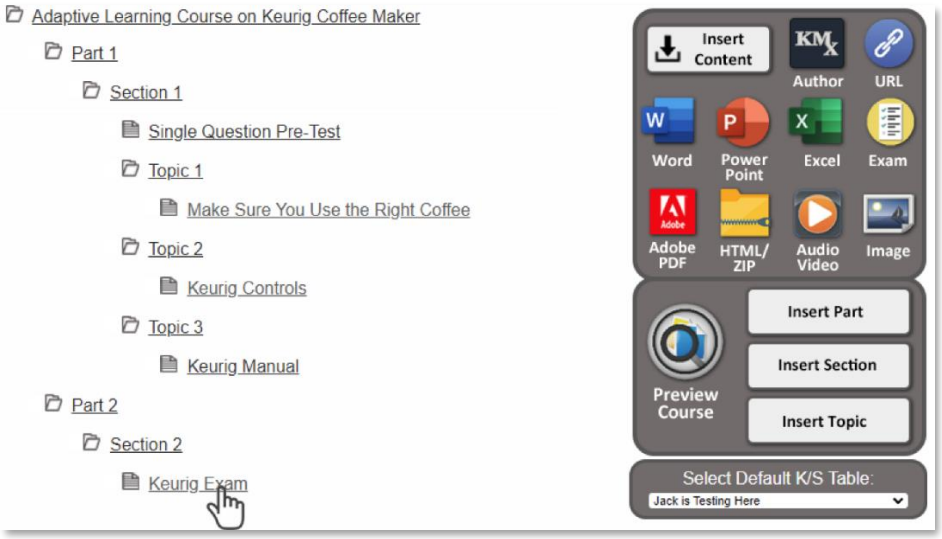
- KMxAuthor
- External URLs & SCORM Content
- Microsoft Word
- Microsoft PowerPoint
- Microsoft Excel
- Exams & Surveys
- Adobe Portable Document Files (PDF)
- HTML/Zip
- Audio/Video Files
- Image file formats (.gif and .jpg)

KMx provides an expandable course outline editing interface to review and assign content objects to populate the course outline. Visual indicators are provided to assist the developer in completing this process. This is the Course Development Toolbar (pictured above). It is available from the Courses main menu item. Using the "Review a Course Outline" process option and selecting a course will open this toolbar. It is used in conjunction with the Course Outline to insert elements into a course. The toolbar has an Insert Content icon to create a link between the course outline and a content object already available in the content management system. It also has icons for the insertion of content both into the course outline and the content management system for MS Word, MS PowerPoint, MS Excel, Adobe (PDF), Video/Audio (Windows Media formats), HTML/Zip, Image (JPG/GIF), Exam and external URLs. Beneath these icons are tools to create course outline subdivisions (Parts, Sections and Topics).

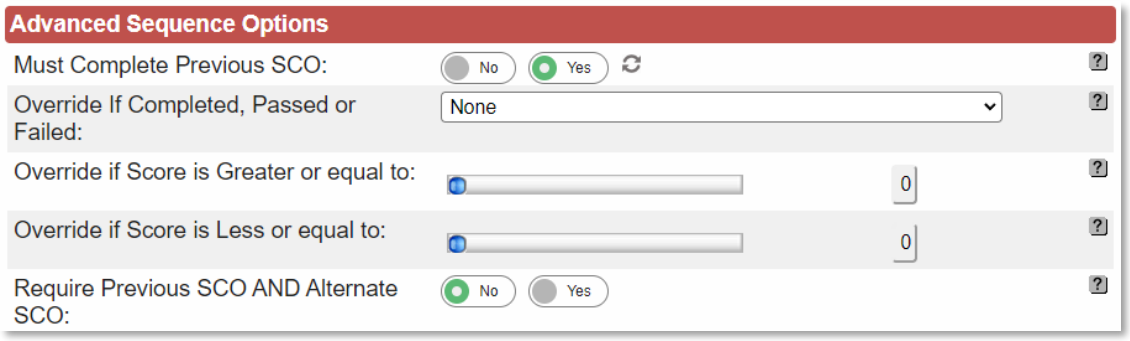
4.3.1 Adaptive Learning

Adaptive learning is an educational model that defines methods of leveraging computer algorithms to orchestrate system interactions with the learner and deliver customized resources and learning activities to address a learner's unique needs. KMx V14 includes new adaptive learning features fully integrated with the KMx course outliner and provides learners with a seamless user navigation interface experience. Developers can define content availability thresholds based on element score ranges, aptitude assessments, access sequence, and element status.

To leverage adaptive learning, your course must contain multiple course content objects. Adaptive learning settings can be enabled by selecting a course content object from the course outline view.



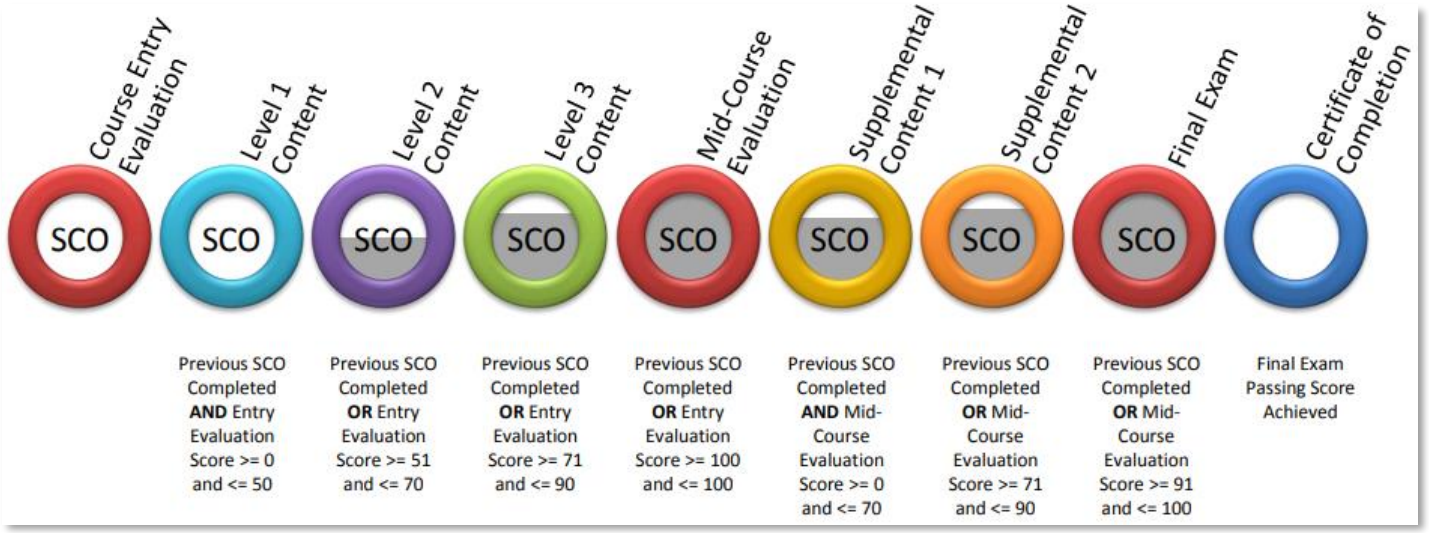
Next, expand the Advanced Sequence Options section header, and select "Yes" for "Must Complete Previous SCO". The course content options form will refresh to display all advanced sequencing options.



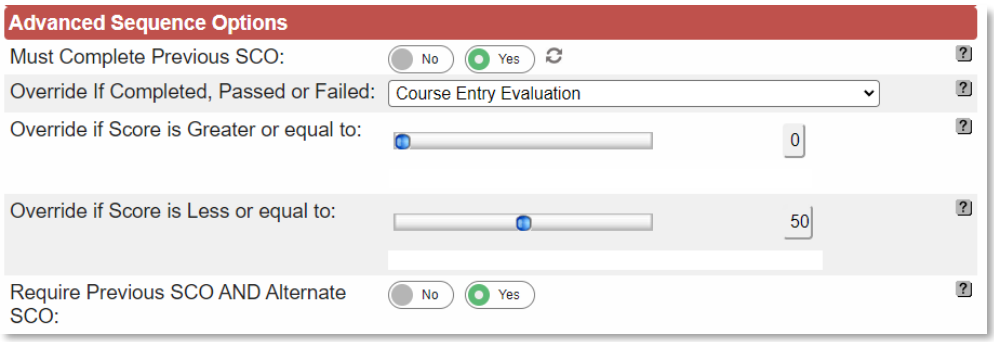
By default, when "Must Complete Previous SCO" is enabled only, students must complete the previous course content object before progressing. Do not enable any additonal sequencing options if this is your intended behavior.

Remaining advanced sequencing options change default behavior and allow course content access to be overridden if specified criteria is met. Start by selecting the course content object that enables override in the "Override if Completed, Passed or Failed" dropdown. Next, use the sliders to specify the score range to trigger the override option. Lastly, use "Require Previous SCO AND Alternate SCO" to determine if access to the content object can be attained by completing the alternate SCO or if the user must complete the alternate SCO and the previous SCO.

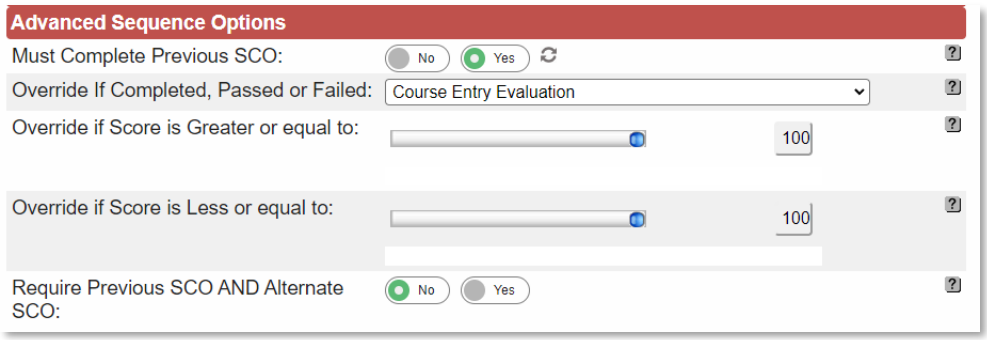
The graphic below illustrates how advanced sequencing options can be leveraged to implement adaptive learning.



Using the above graphic as reference, access to Level 1 Content would be established using the settings below.



Access to the Mid-Course Evaluation would be established using the settings below.



5 Classes

General administration of Class and eLearning enrollment information is provided on the Courses tab under the Classes dropdown. Classes are Scheduled implementations of Courses with Activities and Resources.

Select Insert a Class Record to create a new class instance. Select Review a Class Record to Assign Instructors, Review Class Rosters, Student Grade Books, and scheduled Activities. Select Review eLearning Enrollments to review asynchronous enrollments and student Grade Books.

Classes are scheduled implementations of a course. This means that in order to schedule a class, a course must exist to be scheduled. The first step to creating a class is to "Insert a Class Record". The class must have a unique title to differentiate it from other classes in the catalog. A good approach is to use the course title plus additional information to differentiate the class from other instances of the same course like location or timeframe (fall, 1st Quarter, October). In order for students to self-register for the class, the start date must be in the future and the course must be available in a catalog that the student has access to. Class start and end dates, maximum class size and waitlist information should also be completed. Use the Master Schedule to review and to edit class records. Leverage the Copy button on the bottom of the class record to quickly create additional class instances. The class calendar will be available for all students enrolled in the class (see Class Activities).

5.1.1 Administrator Class Search

When searching for a course/class from main menu search or Review a Class Record, administrators are provided with options to filter their search. The search can be filtered on a particular catalog (or all catalogs) or on a particular K/S Table (or all K/S Tables). Selecting both options will limit the search to only courses found in both the specified K/S Table and the specified catalog. The foreign catalog key may be entered as search criteria to produce a match.

5.1.2 Waitlist / Cancellation / Notification

Administrators can specify if a waitlist is authorized for a particular class offering, and if so, how large it may grow. Each night a batch process runs to see if there are any open seats and notifies the appropriate number of waitlist members that they can come back and register.

5.1.3 Automated Reminders

On a Class record, reminder notifications can be enabled which remind enrollees in advance of the class session. Up to 3 separate reminder notification time periods can be specified.

5.1.4 Self-Cancellation

Self-cancellation is supported for non-ecommerce courses and classes. Administrators can control if this is supported system wide or as needed for individual offerings. The self-cancellation, waitlist, and the various

automated reminders allow training managers who chose to do so, to put more responsibility for training selection, enrollment, and attendance on to their learning community without taking on additional administrative work themselves.

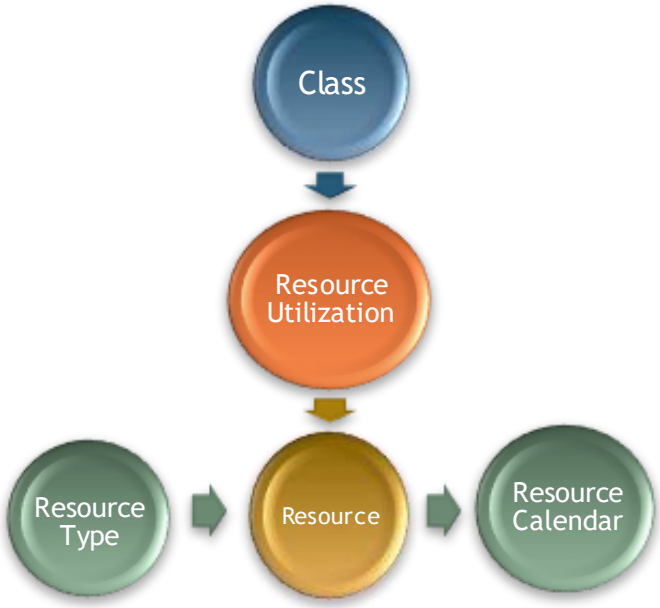
5.1.5 Student Messaging

Ad hoc messages may be submitted to all class enrollees by using the option "Send email to enrollees." This feature is useful for providing additional information to enrollees, such as a list of items to bring to class or if the class location/time has changed.

5.2 Resources

Resources (classrooms, instructors etc.) are consumed by classes. Before a resource can be scheduled it must first be created in the system. Use the Insert Resource Record option on the Setup tab to identify the resource title, type, and quantity.

If the resource is an instructor, the instructor's name and qualifications make a good resource title. Make sure to identify which individual is associated with the resource record. If the individual being setup as an instructor is not on the list, use the People tab to review the member's record and mark the individual as a Qualified Instructor. To schedule a resource, select the course/class that the resource is scheduled to support and set the appropriate options in the Instructor and Resources group. Use the Master Schedule to review resource scheduling conflict and to edit resource schedules.



5.2.1 Advanced Resource Scheduling Options

KMx includes an "Advanced Resource Scheduling" tool that enables clients to restrict selection of resources (Instructors, Classrooms, etc.) based on availability, configuration (computer lab, number of seats) and instructor qualifications. This option is controlled using the Review Organization Information option under the Setup main menu option.

5.2.2 Instructors

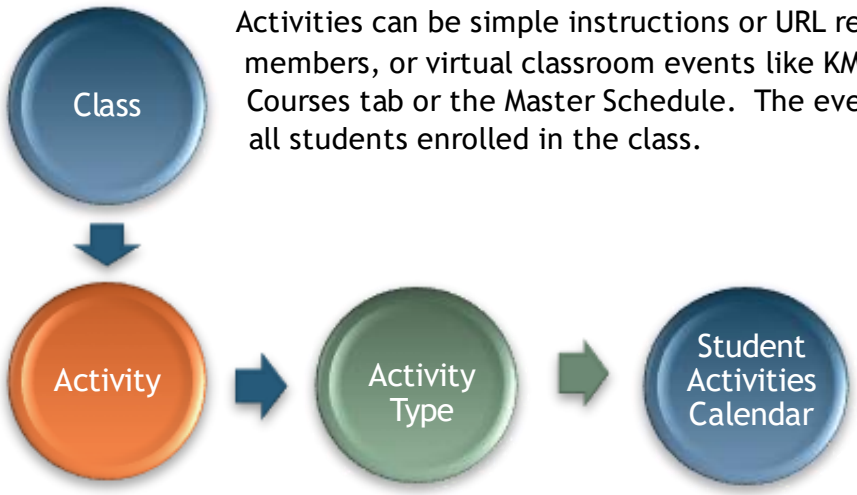
In KMx, Instructors that can be scheduled in connection with a class are also considered Resources. Before an instructor can be scheduled for a class session, a resource record must be created that identifies the Member (must be a qualified Instructor) as a Resource that can be scheduled. This process allows clients to create complex resource utilization comparison reports and also provides the mechanism by which the Instructor calendars are maintained.

5.2.3 Classrooms

In KMx, Classrooms that can be scheduled in connection with a class are Resources. Before a classroom can be scheduled for a class session, a resource record must be created that identifies the classroom attributes. This process allows clients to create complex resource utilization comparison reports and also provides the mechanism by which the classroom calendars are maintained.

5.3 Class Activities

Class Activities can be several types, including online course, formal class, read document and review website. These types define how KMx will present the activity to the student. A formal class activity indicates that the start and end date/time are fixed and that the activity will occur during this period. All other activity type date/times are used to indicate when the activity should be completed.



Activities can be simple instructions or URL references that are provided to the class members, or virtual classroom events like KMxLive. Activities are managed from the Courses tab or the Master Schedule. The event will appear on the class calendar for all students enrolled in the class.

5.4 Locations

In KMx, locations are normally addresses where classrooms are located. Available under the Setup menu option, organization locations should be setup prior to the creation of class records.

5.5 Class Batch Enrollment

Select the Batch User Enrollment option from the class record and in the popup window, enter the Directory Services IDs of the users you would like to enroll in the class.

5.6 After Class Notifications

KMx includes an After Class Notification feature that enables a time-based email template to be used for notifications at a specified period of time after class completion to be sent to individuals on the class roster. Clients requested this feature to enable post class surveys, activities, and other information to be provided to the class participants.

6 Knowledge and Skill Inventory Tables (K/S Tables)

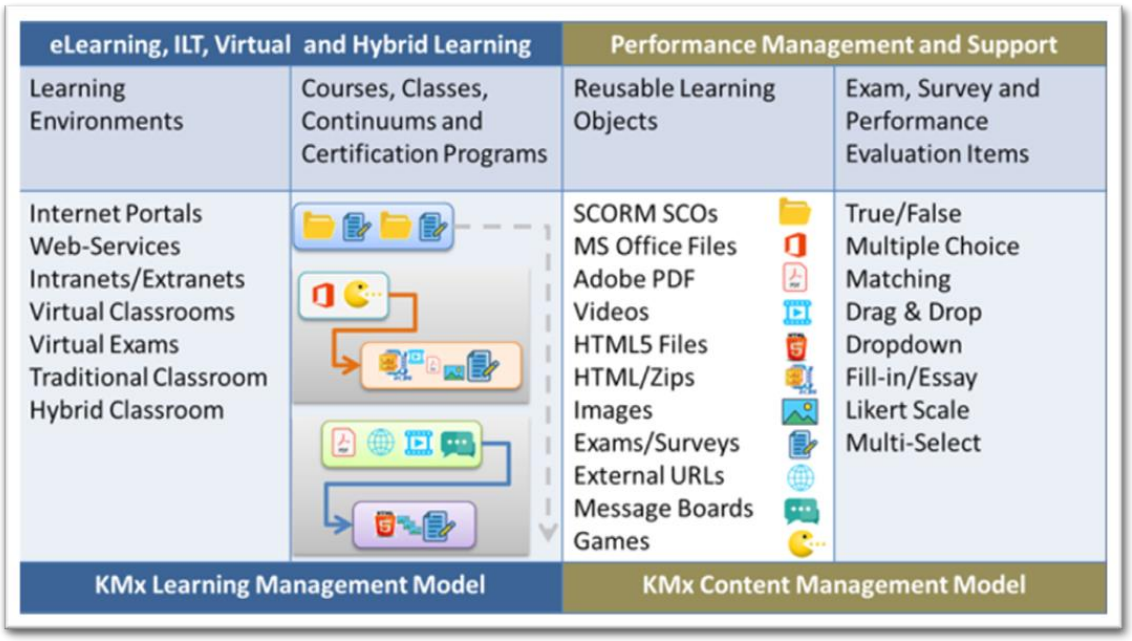
Knowledge and Skill Tables provide a convenient method for classifying information within the KMx architecture. K/S Tables have the following attributes:

- K/S Tables provide a filing method for organizing content within the KMx Content Management System
- K/S Table normally encompass a subject area

K/S Table Management is available on the Setup tab.

7 Content Management

KMx provides an integrated environment for developing, managing, and delivering training, performance support and documentation. KMx also provides performance support and just-in-time training from centralized content management architecture.



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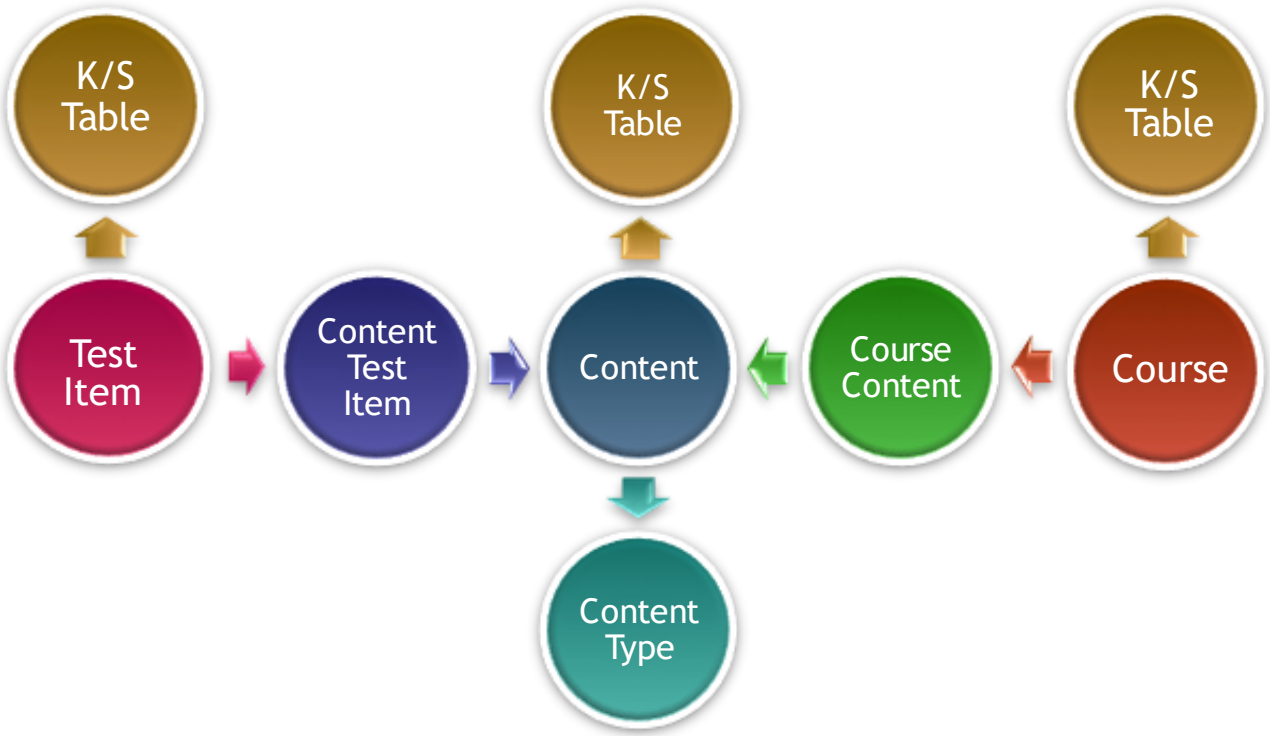
Content developers can use the KMx environment to instantly create new programs that can include presentations, video, audio, animations, images, assessments, surveys, collaborations, and documentation. KMx also supports all third-party SCORM authoring tools. KMx provides a highly granular and reusable content management architecture that implements all SCORM requirements. KMx provides fully automated processing of SCORM Content Packages.

7.1 Content Relationships

The following diagram illustrates the relationships between content and other KMx data elements. Content in the KMx architecture is reusable. This approach enables authors to include a shared element of information or a presentation in multiple courses without the need to maintain multiple copies of the content. This approach is also used by exams and their associated test items.



All content, course, and test item data is organized by K/S Table in the KMx content management system. Relationship records, including "Course Content" and "Content Test Item" records, define the use of content or test items. This approach enables the content to have independent characteristics when used in a particular course, for example in one course the content may be elective and not impact a learner's score while in another course the same content may be essential and have a "Weight" that does affect the learner's score and ability to pass the course.

7.2 Content Types, Status and Versioning

Understanding the various content types, setting and reuse features is an important element for site administrators. Each content type and their associated usage settings have numerous common elements, including session and total time tracking by learner, completion status recording and user access timestamps. Some content types (see below) have special settings to enable more advanced learning tracking and use features. It is important to note, that even though KMx does convert MS Office files to HTML/VML for learner use, the original MS Office file is maintained for revision and change management. Content with a file size less than 20MB in file size will upload using the Edit Content/Browse form options. Content files and SCORM packages greater than 20MB in file size should be pre-positioned using your site FTP account and selected from the waiting area dropdown on the Edit Content popup menu.

Content Records provide the administrator with data fields to track internal version numbering, creation date, last update, and other change management audit features. Content records can also be identified as requiring periodic review with email notification to a "Content Owner" if desired.

Content records include a Status field that can have one of four possible states:

Draft – The content is available for edit by any administrator of developer with the required permissions.

Final – The content is in a non-editable state as the result of administrator action.

Revised Final – The content is in a non-editable state as the result of administrator action and is a variation of another active content record.

Unavailable – The content is in a non-editable state as the result of being "checked-out" of the content management system for editing or other revision.

7.2.1 Exams, Surveys and Performance Evaluations

KMx uses Test Records to define the options, features, and controls associated with an exam, survey, or performance evaluation. Test Records provide the following options:

Timed Test – Used to provide a test time limit in minutes.

Proctored Test – Used to require the login by an Instructor to validate the test use for the learner prior to test launch.

Randomized Test – Used to enable the randomization of a number of test items assigned to the test.

Test Item Navigation Bar – Used to enable page-to-page test item navigation or list display (all items at once) of the test.

Type of Test – Used to determine if the test is an exam, survey, or performance evaluation.

See the topic titled "Exams, Surveys and Evaluations" for more information.

7.2.2 Adobe PDF

The Adobe PDF content type is provided to enable a PDF file to be used in a course outline or document. KMx will automatically create a SCORM container for the PDF file to enable session and total time tracking by learner, completion status recording and user access timestamps.

7.2.3 Image (JPG/GIF)

The Image content type is provided to enable a JPG or GIF image file to be used in a course outline or document. KMx will automatically create a SCORM container for the JPG or GIF image file to enable session and total time tracking by learner, completion status recording and user access timestamps.

7.2.4 Microsoft Word

The MS Word content type is provided to enable a .DOC or .DOCX file to be used in a course outline or document. KMx will automatically convert the file to HTML and create a SCORM container for the converted file to enable session and total time tracking by learner, completion status recording and user access timestamps.

7.2.5 Microsoft PowerPoint

KMx includes the functionality for imported PowerPoint files (.PPT or PPTX) to be rendered as HTML5 output files with slide navigation controls or a navigation bar. During setup, the developer can enter an "A" into

the Completion slide# field on the Content Record setup form. Entering an "A" into this field triggers an automatic wizard that will determine the ending slide of a linear presentation and add slide navigation controls to the interface. Unlike the slide navigation bar, the standard navigation controls present as directional arrows that automatically render based on the student's current location in the presentation. This feature supports clients that would like embedded slide to slide navigation for a linear presentation but do not want to enable the slide navigation bar that allows the student to "Jump" to any slide in the presentation. As with all other MS PowerPoint entry options, this feature automatically tracks student progress, bookmark, and time.

7.2.6 Microsoft Excel

The MS Excel content type is provided to enable an .XLS or .XLSX file to be used in a course outline or document. KMx will automatically convert the file to HTML and create a SCORM container for the converted file to enable session and total time tracking by learner, completion status recording, and user access timestamps.

7.2.7 External URLs

There are 4 types of external URLs as follows:

1. External URLs designed to allow an External Website or Intranet/Extranet URL to be used in a course or a document.
2. Imported SCORM Sharable Content Objects (SCOs). KMx will automatically create a SCORM container for the URL to enable session and total time tracking by learner, completion status recording, and user access timestamps.
3. Content developed using the HTML editor and KMxAuthor (see Chapter 19 for detailed information).
4. Email templates developed using the HTML Editor.

7.2.8 SCORM Sharable Content Objects, Resources and Assets

When importing a SCORM package (Content tab, Import SCORM Package) the administrator must either select an existing K/S Table to load the package into or create a new K/S Table. We recommend creating a temporary new table if you need to test your package or have any reservations about the package you are importing. SCORM packages less than 20MB in file size will upload using the Browse/Upload option. Packages over 20MB should be pre-positioned using your site FTP account and selected from the waiting area.

7.2.9 SCORM 1.3 (2004) Information

The process for importing SCORM 1.3 courseware into KMx is the same. Once imported these courses and their associated content objects will be automatically indexed into the content management system and a course outline will be generated. The SCORM specification does not allow mixing of SCORM 1.2 and 1.3x content objects in a single course. For this reason, we recommend that clients using KMx as their authoring environment continue to develop courses to the 1.2 specification. Because of the course content features of the SCORM 1.3x IMSS meta-tagging specification, modifications to your course should be accomplished in the original authoring environment.

7.2.10 Video/Audio Files

The Video/Audio content type is provided to enable WMV, WMA, MPG, MP4, MOV and other video/audio format files to be used in a course outline or document. KMx will automatically create a SCORM container for the video/audio file to enable session and total time tracking by learner, completion status recording, and user access timestamps.

7.2.11 Message Boards

KMx message boards provide the ability to include a fully searchable threaded discussion within a course or a document. Message Boards can also be associated with a Class Record (see Classes, Resources and Activities). Message boards can also be associated with a personnel category. Creation of a message board requires that the content record (message board) be provided with a title. Selecting Edit Content on the Content Record will initialize the named message board. All Instructors (see People and Companies) are automatically designated as message board moderators and are provided with advanced options to control message board contents. Message boards allow for the attachment of numerous file types (MS Word, Excel, PowerPoint, etc) to provide a mechanism for controlled exchange of files within the message board thread hierarchy.

7.2.12 HTML/ZIP Files

The HTML/ZIP content type is provided to enable any web-server deliverable content to be loaded into the system. The input file must be a valid archive with a .ZIP extension. This content type requires the developer to specify the URL for the root file (the Launch URL) prior to content edit/upload. KMx will automatically create a SCORM container for the video/audio file to enable session and total time tracking by learner, completion status recording, and user access timestamps.

7.3 Advanced Content Record Options

All content types have a number of Advanced Options that provide restricted access (by Company, IP Address, etc) and provide for the control of the SCORM Application Programming Interface (API). Changing the default SCORM options without a thorough understanding of the SCORM standards can result in content inoperability and other errors during content playback.

7.3.1 Content That Requires Its' Own Window

Certain authoring tools (like Articulate and Captivate) provide templates that include an exit button that closes the student browser. While this approach is obviously not conformant with the SCORM standard, we have added the ability for clients to use these authoring templates with a "Content Requires Own Window" setting on the Content Record. We however still recommend that clients replace this template button with a button that sends the SCORM LMSFinish command and navigates the user to a completion page to conform to the SCORM standard. To use this new option, post content import, clients can set this option to "Yes" on the Content Record to enable the content to run in a Popup window that the content can safely close with an exit button.

7.4 Anonymous Access

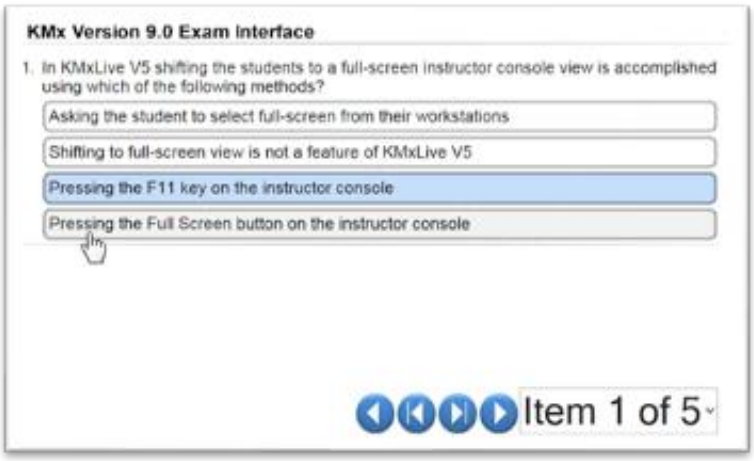
If anonymous access site features are enabled (see Section 14.2.2), supporting content records must also permit anonymous access. On the content record form, enable the setting Anonymous Access Permitted for applicable content records. For example, course cards display an associated course card image. If

anonymous site access is permitted, but the course card image does not permit anonymous access, a display error will occur.

8 Exams, Surveys and Performance Evaluations

Tests are established to verify the understanding and retention of information. Tests are organized by course and K/S table to allow for measurement reporting of individual achievement through formalized training and informal activity. Organization of tests and test items by K/S table also promotes re-use and ease of maintenance of testing materials.

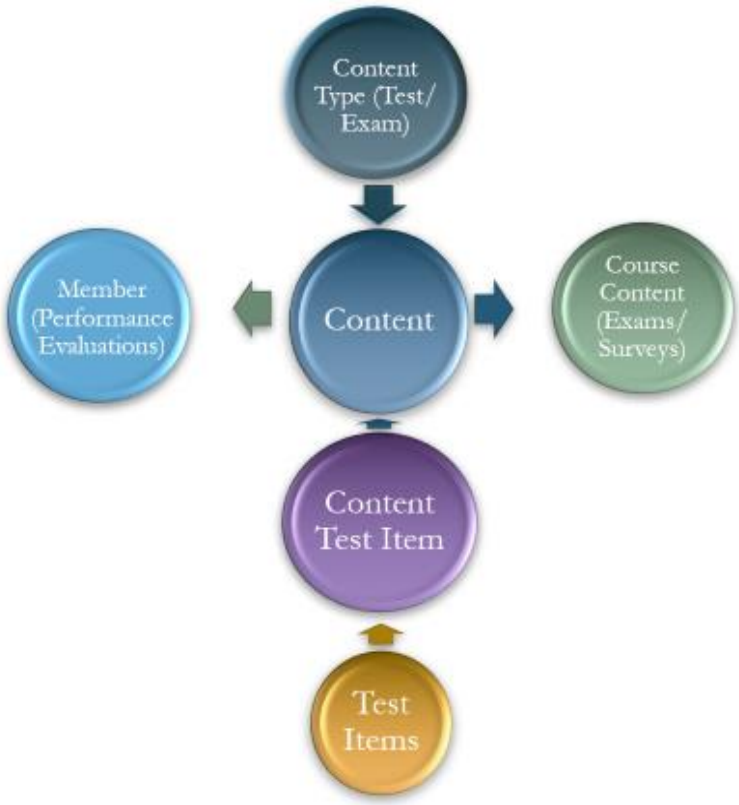
KMx provides a comprehensive testing and examination system suitable for high-stakes exams:



- Extensive test item types including true/false, multiple choice 3-9 answer, fill-in, scored-scale, matching and drop-down.
- Pool and specification-based test item randomization.
- Test item answer randomization.
- Timed testing.
- Proctored testing.
- Scored, un-scored and weighted testing.
- Complete test item and test reuse with fully independent weighting, retake, pre-requisite management and test item response analysis.
- Use of supporting media including audio, video, graphics, supporting documentation and more.
- Enables authors to provide end-users with test item remediation, rationale, references and more.
- Enables behavioral indexing of all test items and their use for organizational analysis, competency, talent management and more.

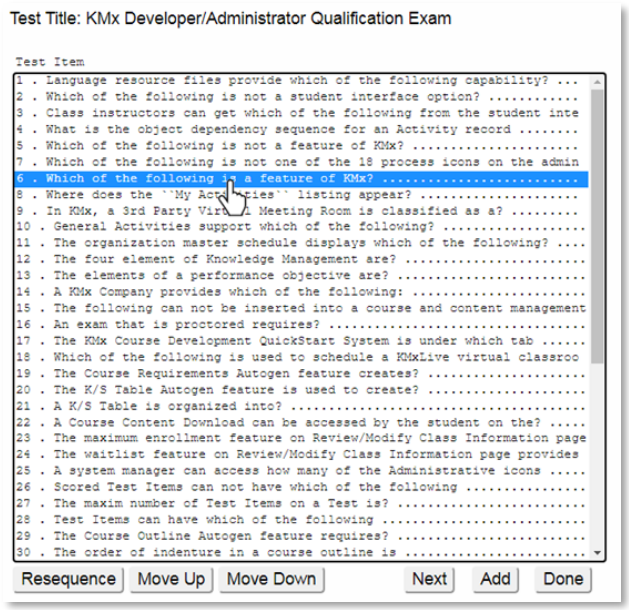
Tests are developed by Inserting a Test Record and Inserting Test Item Records.

Once inserted, these elements are related by using the Assign Test Items to a Test option. You may also Review a Test Record and Test Items from this menu option. Tests are included in a course by using the Assign a Test to a Course option. Once assigned to a course, tests will appear in the course outline as content objects and may be modified using the Review Course Outline option from the Course Content Development menu. Statistical and grade book reports are available from the Reports menu option.



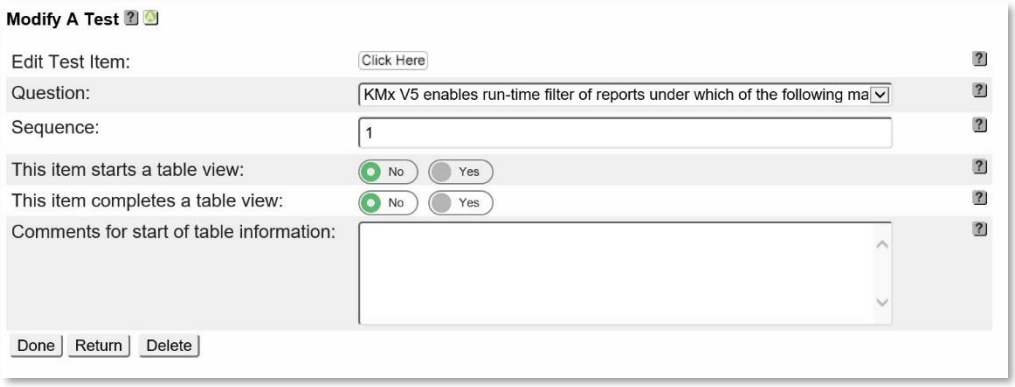
Test are developed using the Content main menu option. Insert a Test Record from the Exams and Surveys dropdown or Insert a Content Record and select type Test/Exam. Exams and surveys require the selection of test items and the selection of options for the exam or survey delivery. Just like creation of a new content record, an exam requires selection of a K/S Table for future content management. As a minimum, the developer must provide a Title for the exam.

The selection of items is accomplished by using the Edit Content "Click here" button on the Exam Content Record form. Adding test items to an exam or survey results in the creation of a list as depicted in the screen below.



With KMx Version 14, the test item interface has been enhanced to enable drag & drop arrangement of exam, survey, and performance evaluation items. To adjust test item sequencing, select a test item by clicking it, use the "Move Up" or "Move Down" buttons, and click "Resequence" when completed. You can also click-hold a test item and move your mouse to adjust the item's location. Use the "Resequence" button when items are appropriately located.

Each entry on the list provides access to a test item assignment record. Questions may be sequenced using this record or randomization can be accomplished using the options on the Exam Content Record form.



In KMx, exams are content objects that are assigned to a course and indexed to a K/S table (subject area) to allow for measurement and reporting of achievement through formalized training and informal activity. Organization of exams and test items by K/S table also promotes re-use and ease of maintenance of exam materials. Exams are developed by assigning test items to the exam. Exams are included in a course by assigning the exam as a content object into the course outline. Once assigned to a course, exams will appear in the course outline as content objects and may be modified from the course outline tree.

8.1 Preparing a Test Item Import Spreadsheet

Test questions can be imported into KMx in the form of a Microsoft Excel Spreadsheet. **Click here** to download the test item import template. The first row of the spreadsheet is assumed to contain the column headers and will be ignored during the import. Each subsequent row represents one test question and consists of 12 columns as follows:

A. test_item_type_id A number from 1 - 9 indicating the format of the question:
   - 1 - True / False (2 answer)
   - 2 - Multiple Choice (4 answer)
   - 3 - Multiple Choice (5 answer)
   - 4 - Fill In the Blank
   - 5 - Multiple Choice (3 answer)
   - 6 - Multiple Choice (6 answer)
   - 7 - Multiple Choice (7 answer)
   - 8 - Multiple Choice (8 answer)
   - 9 - Multiple Choice (9 answer)

B. test_item_reference Optional. A description or citation indicating an authoritative reference associated with the question. It will be displayed to the student only after the test responses are submitted, and if the test is configured to show the test results. This may be left blank if desired.
C. test_item_rationale Optional. A rationale describing the appropriate response. It will be displayed to the student only after the test responses are submitted, and if the test is configured to show the test results. This may be left blank if desired.
D. checkbox Optional. A value of 1 indicates a test question can have multiple answers.

E. test_item_correct_answer A number from 1 - 9 indicating which of the possible responses is correct. For Fill In the Blank type questions, the value may also be set 0.
F. test_item_question The test question or statement to which the student is responding.
G. test_item_answer_1 The first possible response to a true/false or multiple choice question.
H. test_item_answer_2 The second possible response to a true/false or multiple choice question.
I. test_item_answer_3 The third possible response to a multiple choice question.
J. test_item_answer_4 The fourth possible response to a multiple choice question.
K. test_item_answer_5 The fifth possible response to a multiple choice question.
L. test_item_answer_6 The sixth possible response to a multiple choice question.
M. test_item_answer_7 The seventh possible response to a multiple choice question.
N. test_item_answer_8 The eighth possible response to a multiple choice question.
O. test_item_answer_9 The ninth possible response to a multiple choice question.

8.2 Test Items

Test Items are created using the Test Item Import Spreadsheet. Test items can be True/False, Multiple Choice or Fill-in. As a minimum, the developer must complete the Correct Answer, Question, and appropriate Answer Fields. Various options are provided to enhance the test item, including the addition of reference information, rationale, media files, and remediation. Once created, test items can be edited from the test or exam that uses the item.

8.2.1 Drop-Down Lists

Many clients have leveraged the ability to provide KMx "fill-in" questions on their surveys and performance evaluations. There is also an option for "fill-in" questions that provide a drop-down list of possible "fill-in" responses. The approach allows for very long lists of possible answers to be presented to the end user and makes it easier for clients to tabulate the response data for reports and further action. In order to use the drop-down feature, create or edit a "fill-in" test item and select the drop-down option from the menu. Below the drop-down selection option, a text box will appear that will enable you to create the list of possible responses for the end-user. The list can be words, numbers or phrases delimited with a pipe character (usually shift-backslash on a standard QUERTY keyboard).

8.2.2 Expanded Multiple Choice Options

KMx allows for up to 9 possible answers to a "multiple-choice" type question. This capability was designed to facilitate surveys and performance evaluations; however, all "multiple-choice" type questions can have a correct answer and can be scored.

8.2.3 Creating Matching Type Questions

In KMx, all test item types, including table view and Scored-Scale items can have a correct or multiple correct answers. This approach also enables clients to "score" surveys and performance evaluations for reporting purposes. This approach also enables clients to develop Matching questions. To create a matching series of questions, select Multiple Choice with the appropriate number of responses for the number of items to be matched. Matching is accomplished by using the Table View option when assigning the test item(s) to the test. For example:

Match the following items with the correct purpose statement:	Used to slow or stop the vehicle	Used to smooth bumps in the road	Transfers Power from the Engine to the wheels	Enables the vehicle to be pointed
1. Brakes	✓			
2. Suspension		✓		
3. Drive Train			✓	
4. Steering				✓

8.2.4 Fill-in-the-blank questions

KMx includes fill in the blank style question types for use in quizzes and surveys. Automatic grading of these questions is not supported. A report to show all answers to all questions by all individuals who take a course or class is also included to support grading of the fill-in-the-blank style questions as well as statistical analysis of the responses. A test question may contain up to 768 characters. A fill-in response may contain up to 255 characters. Adding this assessment format type meets the needs of many customers to collect free form feedback on course offerings as well as a desire by others to expand the format of quizzes and exams.

8.3 Tests and Exams

In KMx, tests and exams are scored based on an equal weighting of questions (i.e. 1/N where N equals the total number of questions delivered). The ability to randomize both questions delivered and the answers of the questions can provide an extremely secure method for high stakes exam delivery. Tests and exams do not have a passing score. The test/exam produces a score; however, the determination of whether the score achieved is a passing score is determined by the course and the course content record that employs the exam. For many clients, courses will have a single "Final Exam" that has an applied weight of 100% (it essentially is the learner final grade) in the course that uses the exam. For other clients, courses can consist of any number of progress checks and exams with various weights applied.

8.4 Surveys

Surveys are essentially exams that are not scored. KMx provides the fill-in question type as a non-scored element specifically for surveys and performance evaluations. KMx provides the ability to display a multiple-choice question set in a grid to enable the client to create surveys that ask a number of questions against a ratings scale (i.e. poor to excellent). The ability of KMx to capture and collate the student response data into statistical information is the primary reason so many clients use the KMx survey response tools (see the topic titled "Reporting").

8.5 Performance Evaluations

KMx includes capabilities to automate the process of administering a large-scale organizational review program. These features include dynamic group reporting, subordinate summary and results management, and automated assignment and tracking. The Supervisor, People, and Reports menus have options for reporting and management of Personnel Evaluations, including Statistical and Group Average information. See the topic titled "Supervisor Options" for more information.

8.5.1 Supervisor Options

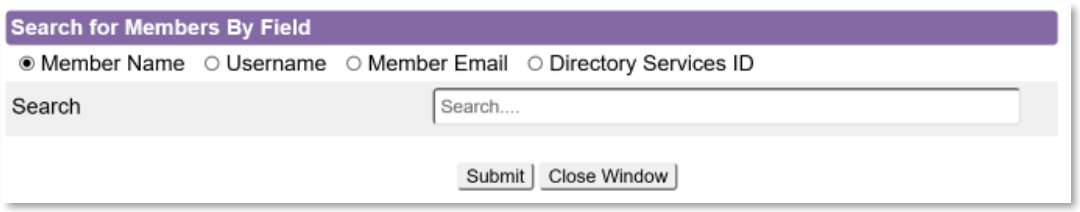
The Supervisor Menu on the Student/Instructor/Supervisor interface provides exceptional reporting associated with personnel and peer evaluations based on due dates assigned. If due dates are not assigned for an evaluation, the reports will only show the evaluations that have been completed.

9 People and Companies

General administration of Member and User information is accessible from the People tab. Select Review Member Information (or Search) to review and update member records. New individuals can also be inserted into the system from this menu option. Personnel information can be maintained within KMx or synchronized with an external system. It is recommended that modification of member records be minimal if an external source is utilized.

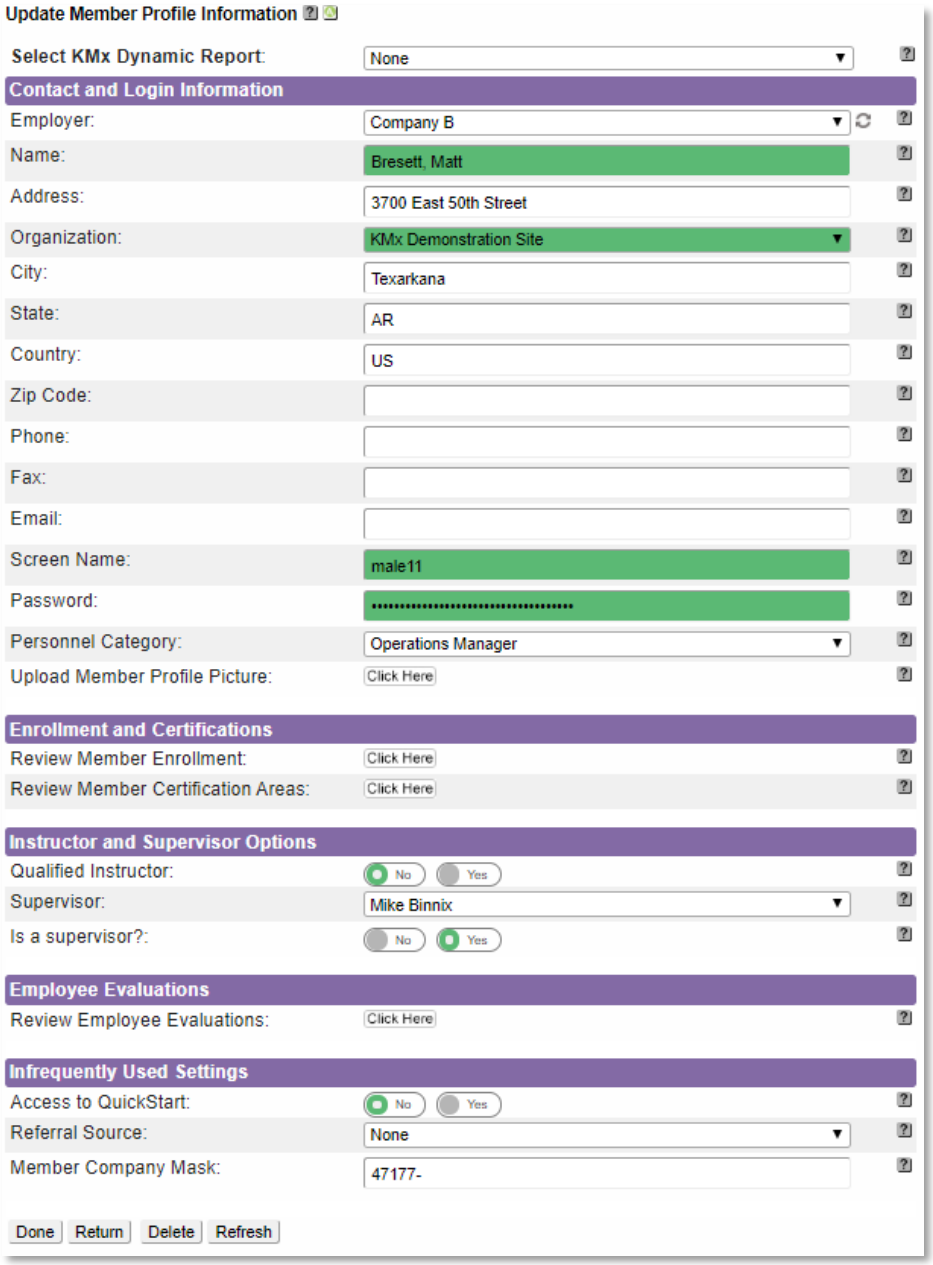
9.1 Review a Member Record and Member Search Features

On the People tab, the administrator has options to Review a Member Record or to Search for a Member. For clients with more than 1,000 users, the Search for a Member option is usually an easier method for finding and opening a member record.



To accomplish a search, select the appropriate type of search (name, email address, etc.) and then enter in the search string. The search response times will be significantly faster than the prior method which searched all names, email addresses, usernames, and directory services identifiers for every search. The results should also be significantly more accurate by specifying the information to be searched for with the user supplied search string.

The Member record has numerous options that provide details regarding a member, including the Company assignment, the status as a Supervisor or Instructor, and other demographic information. From the Member Record, the administrator can also review member enrollments, certification assignments, individual grade books, test results and response information, and personnel evaluation history.



9.2 Company Assignment

From the People tab, an administrator can also insert and review organization subdivisions, called Companies. See the Site Hierarchy topic above for additional information.

9.2.1 Ad Hoc Email to Company

Under the menu area to review a company record, it is possible to send an email to all members of the company.

9.3 Dynamic Calcuation of Organizational Personnel Hierarchy

KMx includes an optional setting on the Organization Setup Form (under Setup) to recalculated the entire organization reporting hierarchy as an automated background process. This process populated a data field in the Members data system named Member Company Mask. Member Company Mask is an alpha-numeric representation of the position of each individual in an organizational hierarchy. This new feature allows Dynamic Reports to select personnel based on their relationship to the position of the individual requesting the report. In previous releases, a supervisor could generate reports that dynamically selected their direct subordinates, but not subordinates further down their organizational hierarchy. The Supervisor Menu options automatically adjust the default personnel evaluation and other default reports based upon the value of this new option.

9.4 Personnel Categories

A personnel category provides the ability to classify or group individuals within an organization.

9.4.1 Personnel Category Assignment

For most organizations, the assignment of members to Personnel Categories provides the primary mechanism for classification. Personnel Categories are normally assigned via the batch user import or from the client Human Resources Information System using a daily feed process.

9.5 Supervisor Options

Supervisor IDs enable KMx to provide managers with access to subordinate personnel profiles. The Manager/Supervisor is provided with a Supervisor Dashboard on the Student/Instructor Interface (see section Supervisor Dashboard). Supervisor assignments are normally accomplished via the batch user import process or from the client Human Resources Information System using a daily feed process.

9.6 Instructor Options

The Member Record enables the designation of a member as an Instructor. Instructors are provided with an Instructor Dashboard on the Student/Instructor/Supervisor Interface (see section Instructor Dashboard). Designation as an Instructor also provides the authority to use the KMxLive Instructor Console (see the topic titled KMxLive), provides the member with the authorization to proctor an exam (see the topic titled Exams, Surveys and Performance Evaluations) and allows the member to moderate a message board (see the Message Board topic under Content Types above).

9.7 Enrollments

From the Member Record, an administrator can review the enrollments and transcripts of a member. The administrator may also change virtually any enrollment result information, including the completion of a

course, the grade achieved, and individual grades on exams contained within a course. Review of a member grade book also provides the ability to determine the individual responses for a member that has completed an exam or a survey. Administrators are not permitted to change student response information or change the SCORM system records for an enrollment.

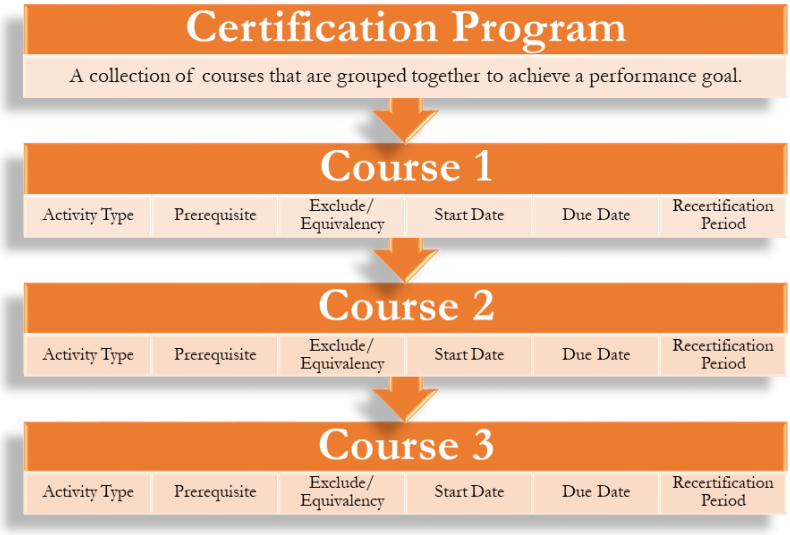
10 Certifications

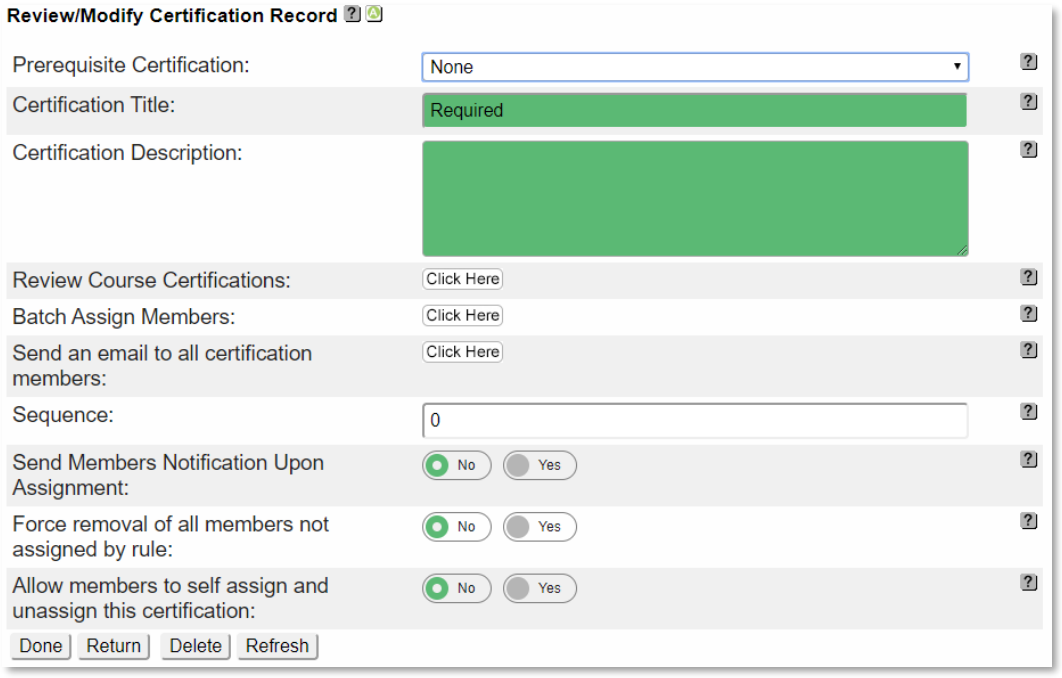
The Member Record provides an interface to review the assignment of Certifications. The option provides the list of currently assigned Certifications as well as the ability to add, review, or delete a Certification assignment.

10.1 Certification Setup

Certifications are very similar to Personnel Category Assignments. The main difference is that a Member can be in an unlimited number of Certification continuums. A member can only be in one Personnel Category at a time. This approach allows certifications to be created for personnel independent of their Personnel Category or Company affiliation.

Certification Records are created under the People tab. Certification Assignments can have prerequisites, initial and recertification periods, and other control elements.





10.1.1 Summary and Detailed Dynamic Reporting Options

KMx Dynamic Reports provides report types for summary and detailed reporting of Certification completion information. The primary difference is that the summary report type is designed to limit the detail of the data reported to overall individual progress in a certification program, vice course by course accomplishment level detail.

10.1.2 Cascading and Prerequisite Certifications

KMx provides the ability to establish certification hierarchies that include prerequisite certifications and the ability to cascade this hierarchy to create branching certification paths from common or foundation certification entry programs. These options are available on the Certification Record setup form.

10.1.3 Ad Hoc Email to Certification

Under the menu area to review a certification record, it is now possible to send all members an ad-hoc email. This provides administrators an easy way to communicate changes to the certification path to members assigned to that certification.

10.1.4 Member Certification Notification

A new notification is available that will notify a member when he is assigned to a certification. The template and contents of the notice can be edited under email templates. The certification record includes a flag indicating if such notices should be sent. By default, this flag is set to no. To send these notices, first review the template and make any changes to the notification language. Then review the certificate record and set the flag to "yes" indicating that the notices should be sent for all new members assigned to this notification. Members assigned to the certification prior to implementation of this feature will receive this notification.

10.1.5 Pre-Calculate Certification Percent Complete

The ability of KMx to track a learner's progress through a certification, and to report that progress a percent complete is a key function that many customers depend on. This value has traditionally been calculated at the time the report was run, giving administrators and managers real-time information but consuming significant resources preparing large reports. To speed up the reports, this value will now be calculated once each night and made available to the dynamic reporting system. The real-time calculation will still be available to allow customers opportunity to update their reports, but customers are encouraged to take advantage of the pre-calculated value in any reports where up to the minute information isn't absolutely essential.

The pre-calculated value of percent complete is available under dynamic reporting system in the table: member_certification, field name: "Member Certification Percent Complete (revised daily)"

10.1.6 Maintenance of Courses in a Certification

An administrator can either open the course record to change its properties as related to a certification or review/update all course/certification properties from the Review a Certification Record option on the People tab.

10.1.6.1 Language Specific Assignments

Courses within a certification profile can be designated as required for a specific language. This feature is useful when certification programs are created that have courses designated for users that speak a certain language (English, French, Russian, etc.). Language specific course certification assignments are made on the Course Certification Record. The preferred method is to create language specific certifications, however certain clients have multi-lingual workforces at a single location where provision of language independent certifications are more useful for reporting and management.

10.1.6.2 Persistent Email Reminders

When assigning a course to a certification, administrators may specify a frequency for recurring reminders to the learner until the assignment is complete. The recurring reminder will use the Assignment Reminder Notice and can be set to regularly email the user until the assignment is complete. The reminder frequency must be set to cause recurring notices to be sent.

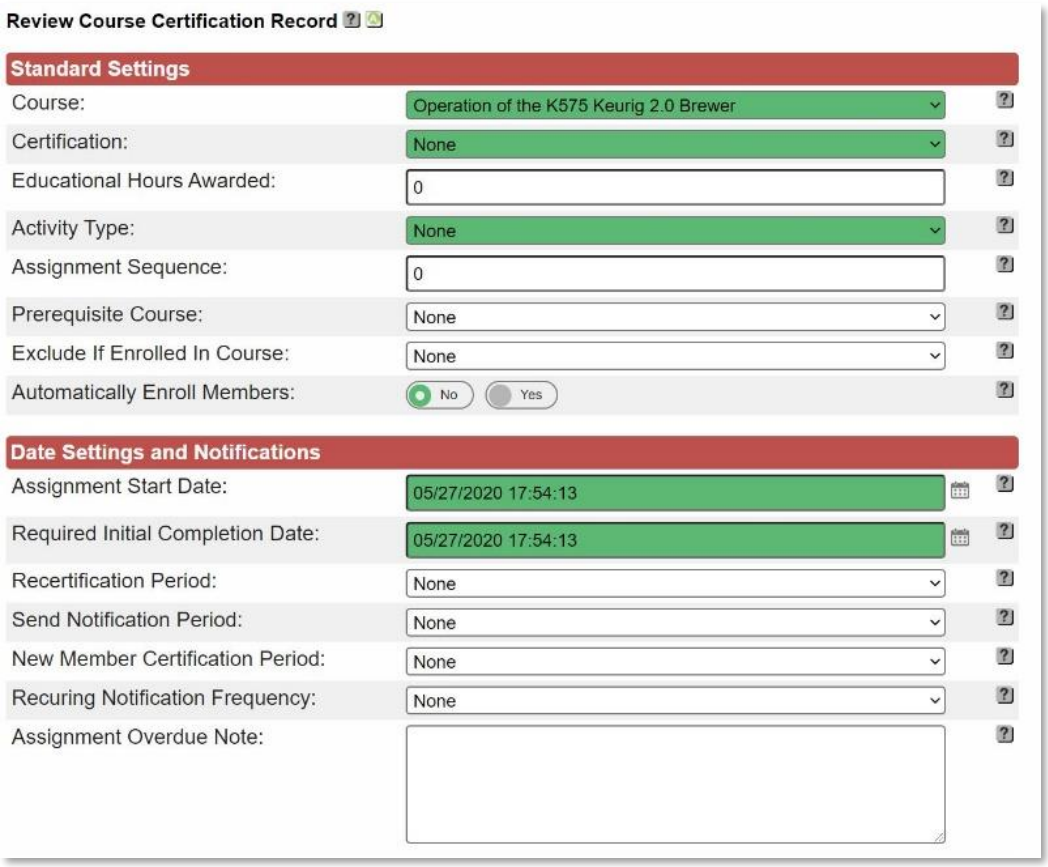
10.1.6.3 Automatic Course Enrollment

When an administrator assigns courses to a certification, there is an option to Auto Enroll in the course. The default value for this is “no”, and no action will be taken by KMx. When set to yes, members assigned to the certification will be automatically enrolled in the assigned course if all of the following conditions are met:

- Must enroll in class = “no”
- All pre-requisites for the course are met OR there are no pre-requisites assigned for the course.
- The enrollment would not violate any duplicate enrollment rules
- If the enrollment is a permitted duplicate, the learner will only be enrolled in support of a recurring training assignment within the notification window prior to the next due date.

Automatic enrollments are processed only once per day.

The Course/Certification Assignment Record

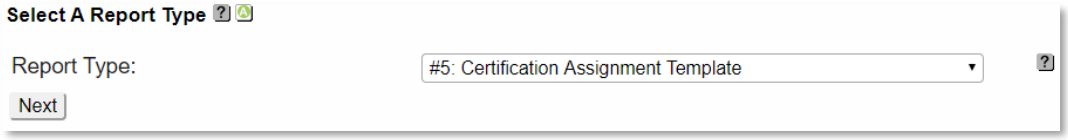


The Student Profile with Certifications Assigned

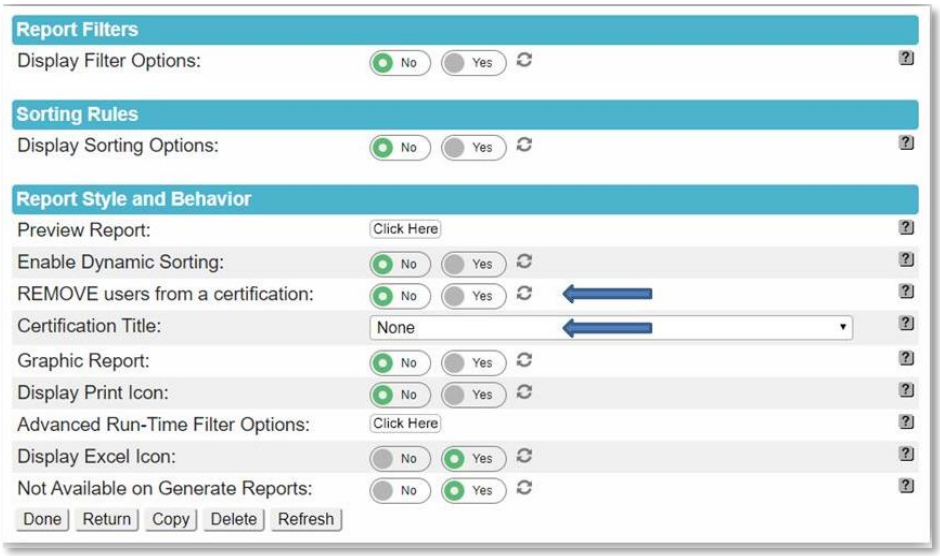
10.1.7 Dynamic Certifications

With KMx, clients can create an unlimited array of training continuums and certification profiles that are dynamically assigned to individuals based on any user demographic information or organizational relationship. This feature will enable clients to create an unlimited array of requirements, assignment and continuums to meet both internal and external business drivers.

By using the Dynamic Reporting tool to create the Certification Group, administrators can easily verify which users are selected or removed.



Certification groups can be established using any demographic information in the Members table.



11 Reports

KMx provides two major reporting systems, Standard Reports and Dynamic Reports/Graphs. This section will review the use and capabilities of both systems.

11.1 Standard Reports

The reports menu is organized to make it easy to find reports. All reports are available from the Reports menu which organizes the options by:

- Members and Labor Categories Reports
- Enrollment, Results and Access Reports
- Class & Resource Schedule Reports
- Course & Content Inventory Reports
- eCommerce Reports Menu
- Company & Supervisor Reports
- KMx Dynamic Reports
- Legacy and Misc Reports

11.2 KMx Dynamic Reports

KMx Dynamic Reporting allows administrators to select from virtually any combination of user enrollment, accomplishment, and requirement information to produce real-time reports. KMx Dynamic Reports can enable the administrator to filter report results "on-the-fly" at report runtime. This capability allows clients to not only create reports that will automatically filter the results based on any logical filter condition, but also allow reports to automatically adjust to the "authority" of the person generating these reports. The process options to insert and modify a Dynamic Report are available under the Reports main menu option.

11.2.1 General Dynamic Report Types

KMx Dynamic Reports has numerous templates designed for both general reporting and advanced report development. The general report types are as follows:

- Certification Assignment Template – Used to assign personnel to a certification based on Member Data and/or Enrollment history information.
- Enrollment Data – Used to generate reports for specific courses, classes or other enrollment centered events.
- Member Data – Used to generate reports based primarily on member demographics information or other member based attributes.
- Personnel Category Data - Used to generate requirement and assignment completion detail reports based on personnel classifications.
- SCORM Data - Used to generate reports containing the actual SCORM Run-Time Environment Variable values generated by the execution of an eLearning program of instruction.

11.2.2 Advanced Report Types

The KMx Dynamic Report Advanced Report types provide an experienced KMx Administrator with the ability to access and query virtually any data resident in the KMx Data System.

Report Type	Description
Certification Completion Data - Detail	This report type replaced the previously available Certification report type and included additional fields to produce more detailed certification based reports.
Resource Utilization	This report type provides the ability to produce instructor and classroom schedule reports based on assignments.
Course Inventory	This report type provides the ability to create custom course inventory reports, including catalog availability.
Content Inventory	This report type enables the creation of detailed content inventory and utilization reports.
Test Item Inventory	This report type enables the creation of detailed test item inventory and utilization reports.
Company	This report type provides the ability to produce organizational reports including hierarchy and location information.
Certification Completion Data - Summary	This report type provides the ability to produce summary level certification completion reports that do not include individual course completion level detail.
Email History	This report type provides the ability to query the email history queue and produce reports on system email transactions.

Course Audit	This report type provides the ability to query the course audit system to produce reports detailing changes to the class records, including dates and person responsible for the update.
Class Audit	This report type provides the ability to query the class audit system to produce reports detailing changes to the course records, including dates and person responsible for the update.
Content Audit	This report type provides the ability to query the content management audit system to produce reports detailing changes to the content records, including dates and person responsible for the update.
Test Event Data	This report type provides the ability to produce detailed reports containing test event data, including the number of test attempts, score and dates of a test/exam.
Enrollment Archive Data	This report type provides the ability to produce reports concerning inactive or deleted users.
Course Access Template (Black List / White List)	This report type provides the ability to produce reports that document the ability for individuals to access courses using the course access template.
Catalog Inventory	This report type provides the ability to create reports that detail the structure and contents of catalogs available, including restrictions and access settings.

11.3 KMx Dynamic Graphs

KMx Dynamic Graphs provides administrators with the ability to dynamically generate graphs from virtually any combination of user enrollment, accomplishment and requirement information. This feature will enable creation of highly colorful visual outputs of data elements, including:

- User and group demographics, requirements and accomplishments
- Course/class enrollments goals and statistics
- Performance of test items and exams
- Personnel classification requirements, completions and delinquencies
- Organizational unit requirements and accomplishments

11.3.1 Standard HTML Graph Types

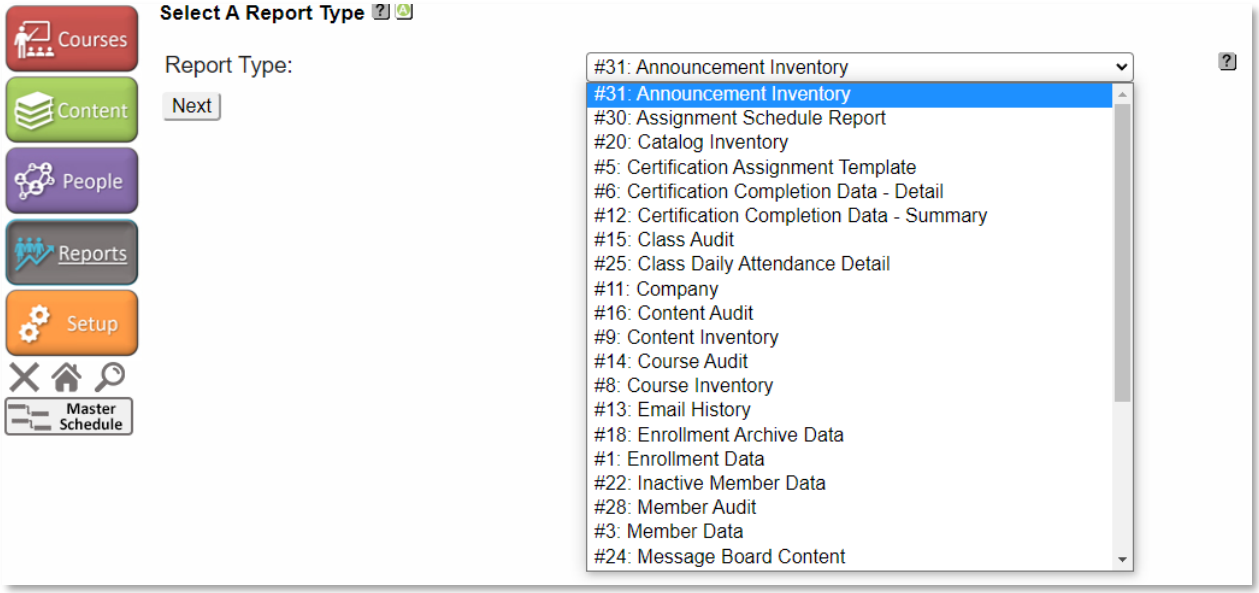
- Bar Chart
- Stacked Bar Chart

11.3.2 HTML5 Graph Types

- Pie Charts (with animated hover-over slices)
- Donut Charts (with animated hover-over slices)
- Bar Charts (with animated bar rendering)
- Line Charts (with animated line rendering)
- Polar Radius Charts
- Waterfall Charts

11.4 Building a Report

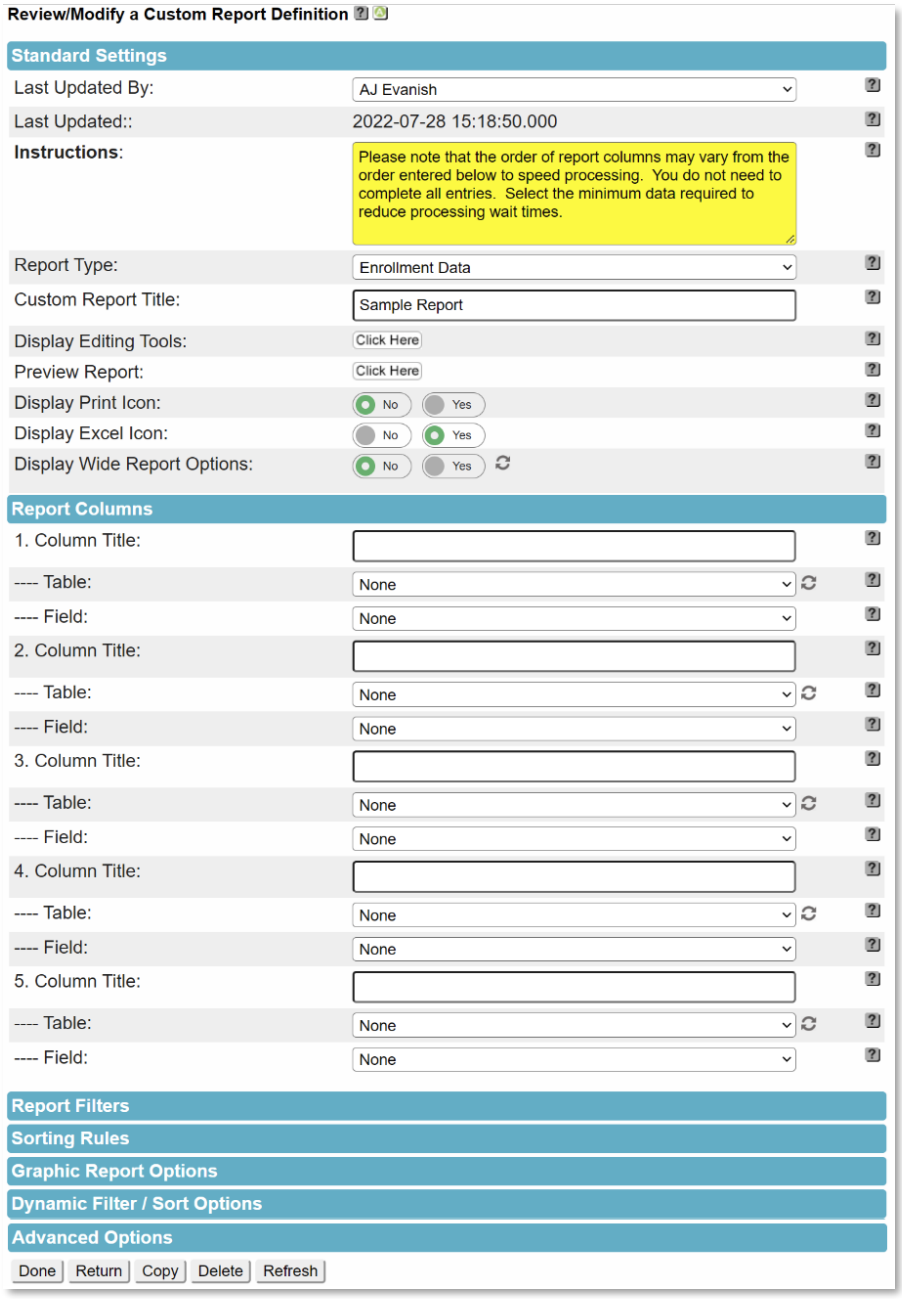
From the KMx Main Menu, select “Reports”, “Insert New Dynamic Report”. Select a report type based on the primary data that your report will draw from the KMx data system.



KMx V14 includes significant updates to the report development interface. All prior report development options are available, but a new report data selector tool is included for ease and simplification of development (see 11.4.1).

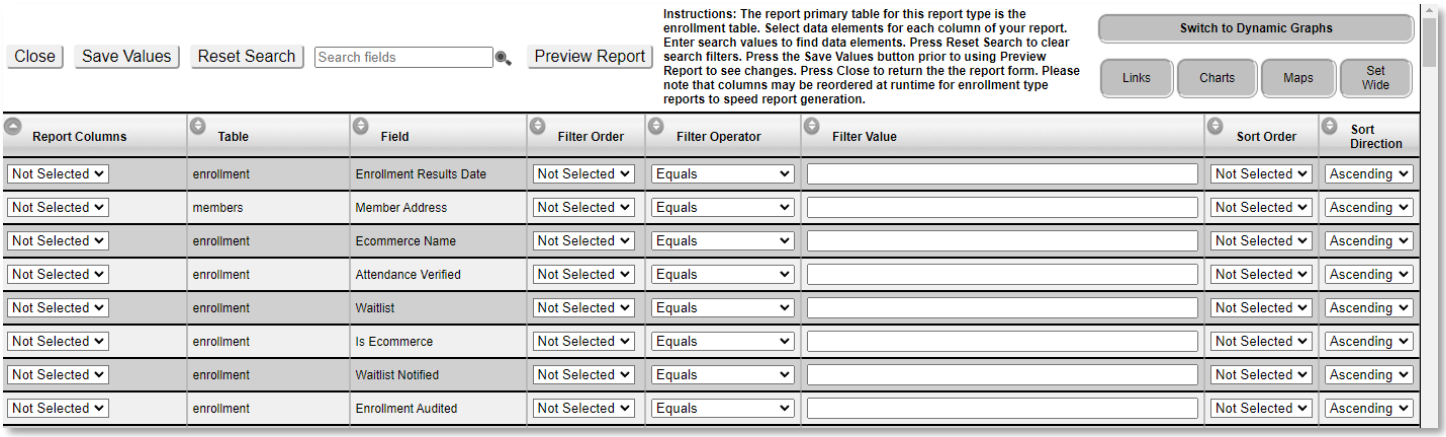
Developers who opt out of using the data selector tool can expand the “Report Columns” section header (below image) to define columns, data tables, and fields. Expand the “Report Filters” and “Sorting Filters” section headers to apply sort and filter options to your report. Dynamic Reports can have up to 20 tabular columns when the “Wide Report” option is enabled. Select “Preview Report” to generate your report output and determine if any changes/additions are necessary. Once saved, the report will be available from the Reports main menu option.

KMx has the ability to dynamically filter report results "on-the-fly" at report runtime. This new capability allows clients to not only create reports that will automatically filter the results based on any logical filter condition, but also allow reports to automatically adjust to the "authority" of the person generating these reports.



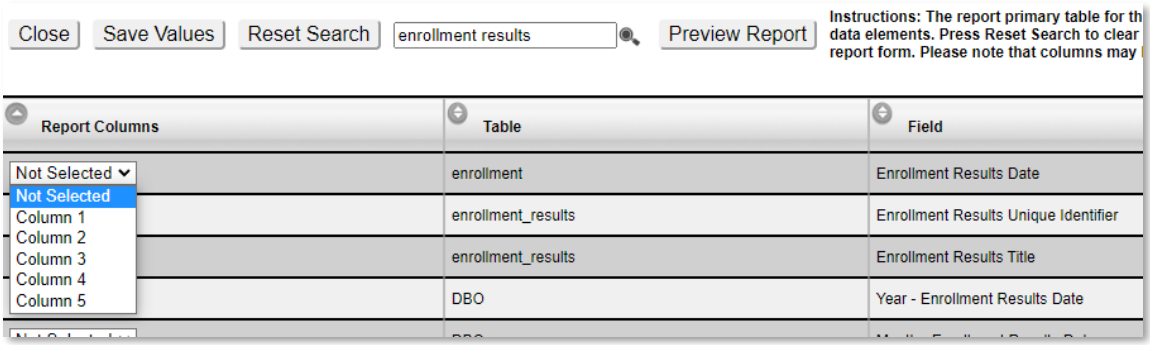
11.4.1 Report Data Selector Tool

KMx V14 includes a report data selector tool for simplification of dynamic report development. After inserting a new dynamic report, select “Display Editing Tools” (depicted above) to expose the new data selector (below).



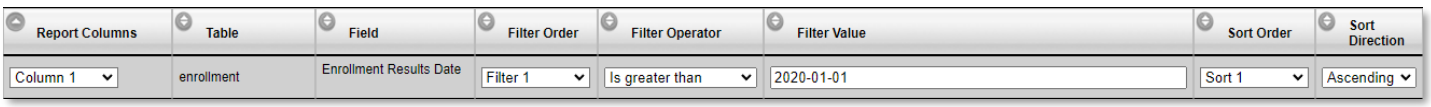
The data selector tool provides developers the ability to search and select data elements for use in a report, chart, map or graph, and the updated interface provides support for creating static and dynamic data filters and associated Boolean operators. It also provides the ability to design cascading sort criteria for report outputs.

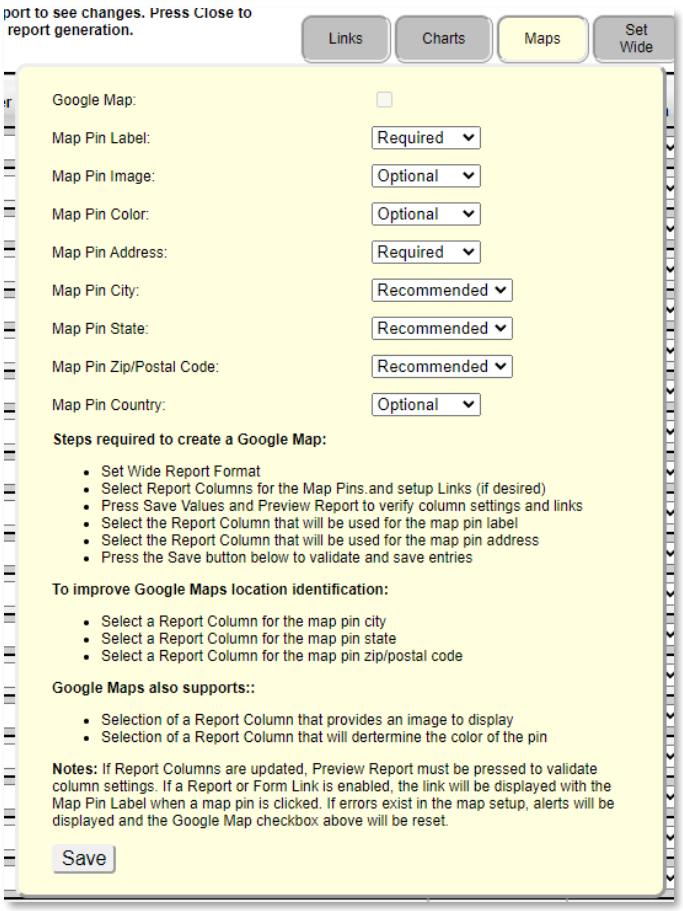
Use the "Search fields" box to seek the reporting field you wish to include, then use the "Report Columns" dropdown to assign it to a column. Once you are satisfied with your selections, use the "Save Values" button. You can also review the report by selecting "Preview Report."



Note that 5 columns are available unless the "Set Wide" option is enabled which expands column selection to 20.

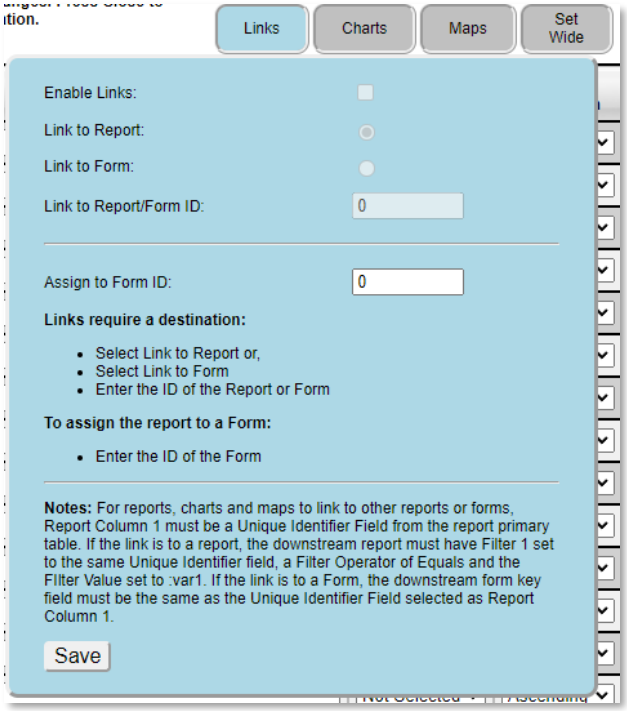
Filter and sorting options are also available for selected fields. To filter, input a "Filter Value", select a "Filter Order" using the dropdown, then select an available "Filter Operator", such as equals, does not equal, is greater than, etc. To sort, select the "Sort Order" followed by "Sort Direction". In the example below, enrollment results date is selected for output in column 1, a filter where enrollment results date is greater than 2020-01-01 is applied, and output will be sorted in an ascending order.

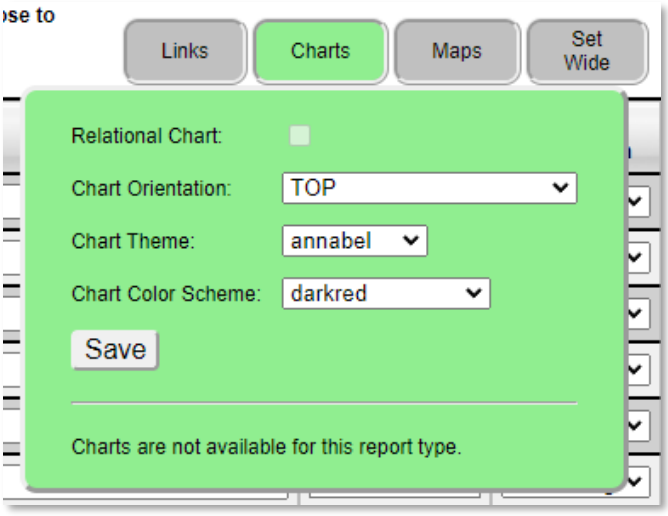




Select "Maps" (left) to review Google Map report integration settings. Instructions and notes are provided in the pop-up for clarity. Review section 13 for additional information.

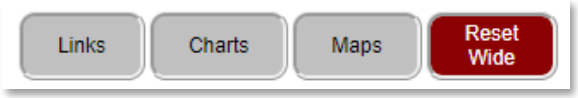
Select "Links" to expose report link options (below). Notes are included in the pop-up to provide additional clarity. Review section 11.6 and 11.7 for additional information regarding links.



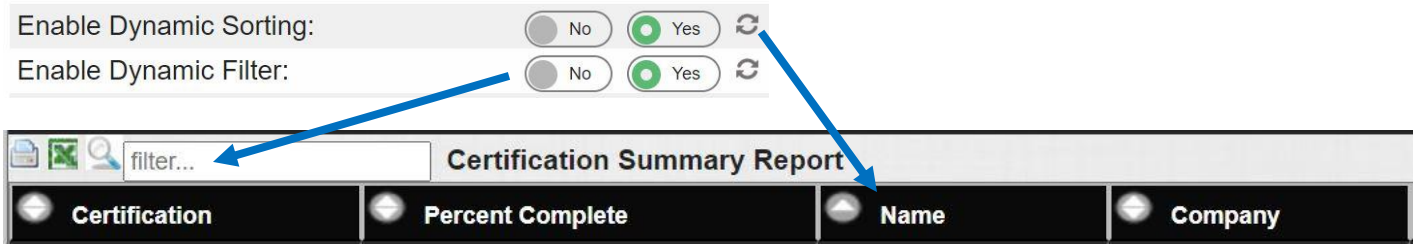


Select "Charts" (left) to review dynamic chart options. Note that charts are not available for all report types. Review section 12 to learn more about charts.

Use the "Set Wide" (below) button to expand reporting columns from 5 to 10. Select "Reset Wide" to reduce columns from 20 to 5. Resetting the wide report format may affect current chart and/or map settings.



11.4.2 Dynamic Reports - Dynamic Sorting and Filter Controls



- Header & Alternating Row Styling
- Clickable Sorting Controls for Each Column
- Query/Filtering Tools

KMx Dynamic Reports provides the ability for administrators to designate new sorting and filtering options. The Dynamic Sorting option provides a stylized report template that includes a special header row that enables by column sorting of the report output. The sorting is accomplished by the user's browser and does not require the report to be regenerated. Dynamic Sorting should not be enabled for reports that produce more than 2,000 rows as this may generate warnings that a process is taking a long time to complete when conducting a sort.

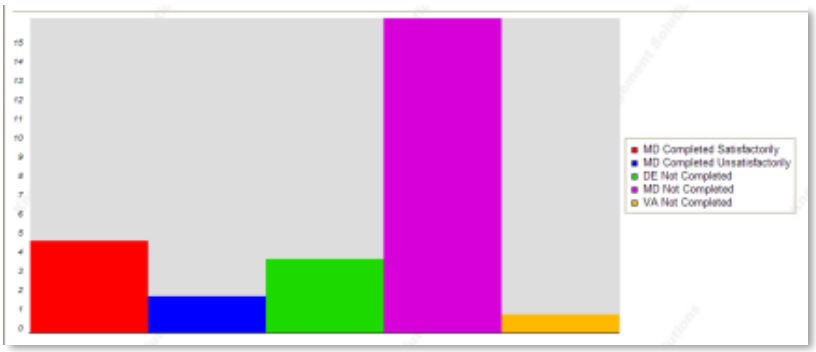
The Enable Dynamic Filtering option is dependent on the Dynamic Sorting option being set to "Yes". Enabling Dynamic Filtering provides a search box at the top of the report that will enable a user to enter a word or phrase to be searched for within the output of the report. The report will remove rows that are not applicable to the word/phrase entered. Sorting of the report can be accomplished on the filtered results.

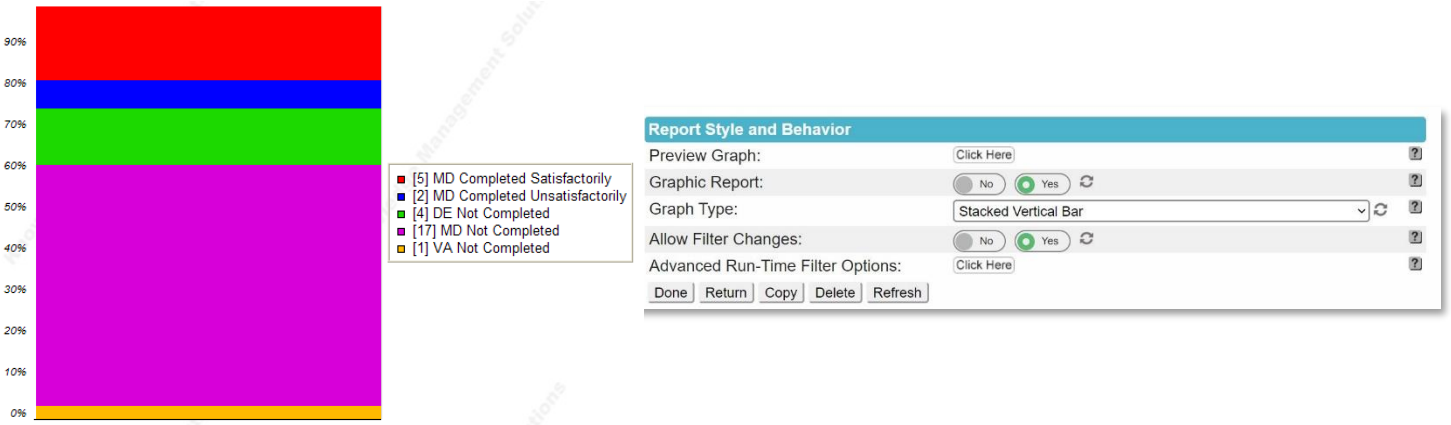
Used together, these features can enable a user to run a report that has been setup by an administrator and further tune the output prior to printing. The feature also provides an easy way for users to query the KMx data system based on parameters established in the report setup and enhanced by the sort/filter options.

The help files associated with each Dynamic Report Type have been updated to include extended field descriptions and use the dynamic sorting and filtering capabilities.

11.5 Building a Graph

KMx has the capability to dynamically generate graphs from virtually any combination of user enrollment, accomplishment, and requirement information.





11.6 Row link URLs:

In KMx Version 9.0, the ability to link a row of data contained in a KMx Dynamic Report was added. The only requirement for using Row Link URLs is to set "Enable Dynamic Sorting" to "Yes" on the report definition form and to enter the URL into the entry labeled "Row Link URL" on the "Advanced Run-Time Filter Options" form for the report. If you want the link to pass identification information to the URL/page, the report must have a column titled "id" that contains the dynamic information (Member ID, Company ID, Course ID, etc.). For example, the URL below would enable a click within a report to forward to the User Record (Form 267) and pass the ID (user_id) of the user of interest:

/ihtml/application/form_modify.ihtml?form_id=267&step=1&no_head=1&update_return=%2Fihtml%2Fapplication%2Fdynamic_reports.ihtml%3Freport_id=231&user_id=

In the report, the User ID field would need to exist as a report column with the title "id".

My Company

Name	Address	City	State	Status
Mike Binnix	3700 W Juneau Ave	Milwaukee	WI	
Palko, Laine	380 New York St	Redlands,	CA	
Swensen, Nydia	380 Sentry Parkway	Blue Bell	PA	
Scouten, Molly	3800 Blackford Ave	San Jose	CA	
Eshbaugh, Heather	3811 N 44th St	Phoenix	AZ	
Emond, Mei	370 Wabasha St N	Saint Paul	MN	
Amico, Vashti	4020 E Indian School Rd	Phoenix	AZ	
Winton, Yan	400 Oyster Point Blvd 440	South San Francisco	CA	
Amerson, Brandie	3911 Sorrento Valley Blvd	San Diego	CA	
Primm, Carmelita	3915 Hiawatha Ave	Minneapolis	MN	
Metzinger, Angelita	401 Smyth	Ottawa	ON	
Taliaferro, Evia	3700 Wilbanks Dr NW	Huntsville	AL	
Hamblen, Margurite	3700 Airport Rd Fl 1	Boca Raton	FL	
Goncalves, Trena	38 Fountain Square Plz	Cincinnati	OH	
Fenner, Agatha	3950 Vantage Ave.	Studio City	CA	
Arens, Joanie	373 Park Avenue South	New York	NY	
Drescher, Alisha	400 N Capitol St NW Ste 450	Washington	DC	
Janz, Claire	3901 S Saginaw Rd	Midland	MI	

The example Row Link URL above will work with any KMx Form, simply replace the FORM_ID (267) with the desired form to link to. The NO_HEAD=1 entry is used to prevent KMx from rendering the administrative interface header (very useful when linking to forms on the user interface or forms that are displayed in a popup window).

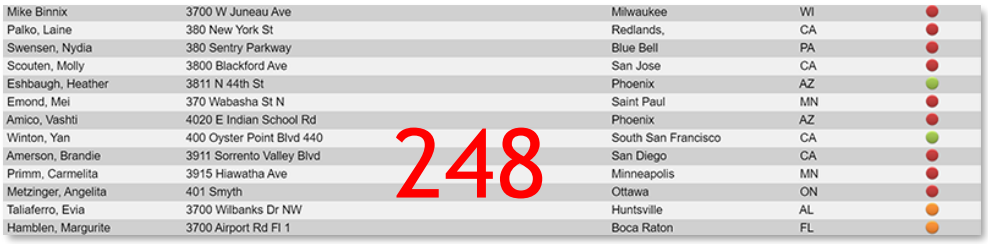
11.7 Drill-Down Reports

Reports can also link to other reports. If you want the link to pass identification information to filter values in the linked report, the calling report must have a column titled "id" that contains the dynamic information (Member ID, Company ID, Course ID, etc.). For example, the URL below would enable a click within a report to forward to report_id #249 and pass the id as VAR1 (with :VAR1 entered as the report filter 1 value) the URL would be as follows:

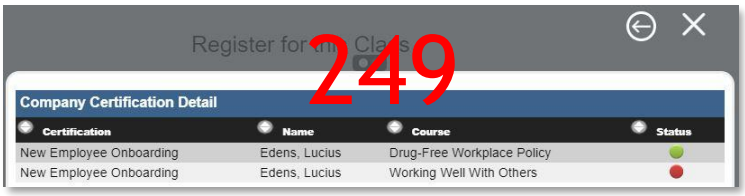
/ihtml/application/dynamic_reports.ihtml?report_id=249&var1=

On report #249 (the report that provides the expanded detail in the drill-down sequence) you can set the option labeled "Enable Return Button" to "Yes" to provide a back arrow return option at the top of the report.

Report #248 below is designed to allow the user to click on a row to drill-down for additional detail in report #249 and report #249 should only display the information associated with the ID information passed.



Mike Binnix	3700 W Juneau Ave	Milwaukee	WI	
Palko, Laine	380 New York St	Redlands,	CA	
Swensen, Nydia	380 Sentry Parkway	Blue Bell	PA	
Scouten, Molly	3800 Blackford Ave	San Jose	CA	
Eshbaugh, Heather	3811 N 44th St	Phoenix	AZ	
Emond, Mei	370 Wabasha St N	Saint Paul	MN	
Amico, Vashti	4020 E Indian School Rd	Phoenix	AZ	
Winton, Yan	400 Oyster Point Blvd 440	South San Francisco	CA	
Amerson, Brandie	3911 Sorrento Valley Blvd	San Diego	CA	
Primm, Carmelita	3915 Hiawatha Ave	Minneapolis	MN	
Metzinger, Angelita	401 Smyth	Ottawa	ON	
Taliaferro, Evia	3700 Wilbanks Dr NW	Huntsville	AL	
Hamblen, Margurite	3700 Airport Rd Fl 1	Boca Raton	FL	



By setting the option labeled "Enable Return Button" to "Yes" on report #249 you can provide a back arrow return option to enable the user to return to report 248.

The example Row Link URL above will work with any KMx Form, report replace the REPORT_ID (249) with the desired report to link to.

11.8 New Color-Coding Functions by Report Type:

Individual report row entries can have unique colors based on a calculated function (i.e. Member Certification Due Color Code) or based on values stored in a custom field (member custom 1-20, company custom 1-10, etc.). The output colors available are as follows:

1. _green_
2. _orange_
3. _red_

These colors are intended to draw visual contrast with the default Color Schemes (see below) and to highlight conditions (good, neutral, bad) to enhance the report. Numerous functions have been added to Dynamic Reports to provide color coded status. All of the new functions are included in the report table titled "DBO" for the report types as follows:

11.8.1.1 Enrollment Data – Course Enrollment One Member/Course

- Green - Completed
- Orange - Not Completed, Not Overdue
- Red – Not Completed, Overdue or Failed

11.8.1.2 Member Data – Course Enrollment One Member/Course

- Green - Completed
- Orange - Not Completed, Not Overdue
- Red – Not Completed, Overdue or Failed

11.8.1.3 Member Data - Personnel Category & Certification Assignments Aggregate Single Member

- Green – All Completed
- Orange – All or Some Not Completed, None Overdue
- Red – All or Some Not Completed, One or More Overdue

11.8.1.4 Performance Evaluation Data - Scheduled Member Evaluation Standard/by Supervisor ID

- Green - Completed
- Orange - Not Completed, Not Overdue
- Red – Not Completed, Overdue

11.8.1.5 Performance Evaluation Data - Scheduled Member Evaluation Special/by Supervisor ID

- Green - Completed
- Orange - Not Completed, Not Overdue
- Red – Not Completed, Overdue

11.8.1.6 Personnel Category Data – Aggregate Assignment/Member

- Green - Completed
- Orange - Not Completed, Not Overdue
- Red – Not Completed, Overdue

11.8.1.7 Certification Completion Data Summary - Single Certification/Member

- Green - Completed
- Orange - Not Completed, Not Overdue
- Red – Not Completed, Overdue

11.8.1.8 Certification Completion Data Detail - Single Assignment/Member

- Green - Completed
- Orange - Not Completed, Not Overdue
- Red – Not Completed, Overdue

11.8.1.9 Company - Personnel Category/Certification Assignments Aggregate/Company

- Green – All Completed
- Orange – All or Some Not Completed, None Overdue
- Red – All or Some Not Completed, One or More Overdue

12 KMx Dynamic Charts

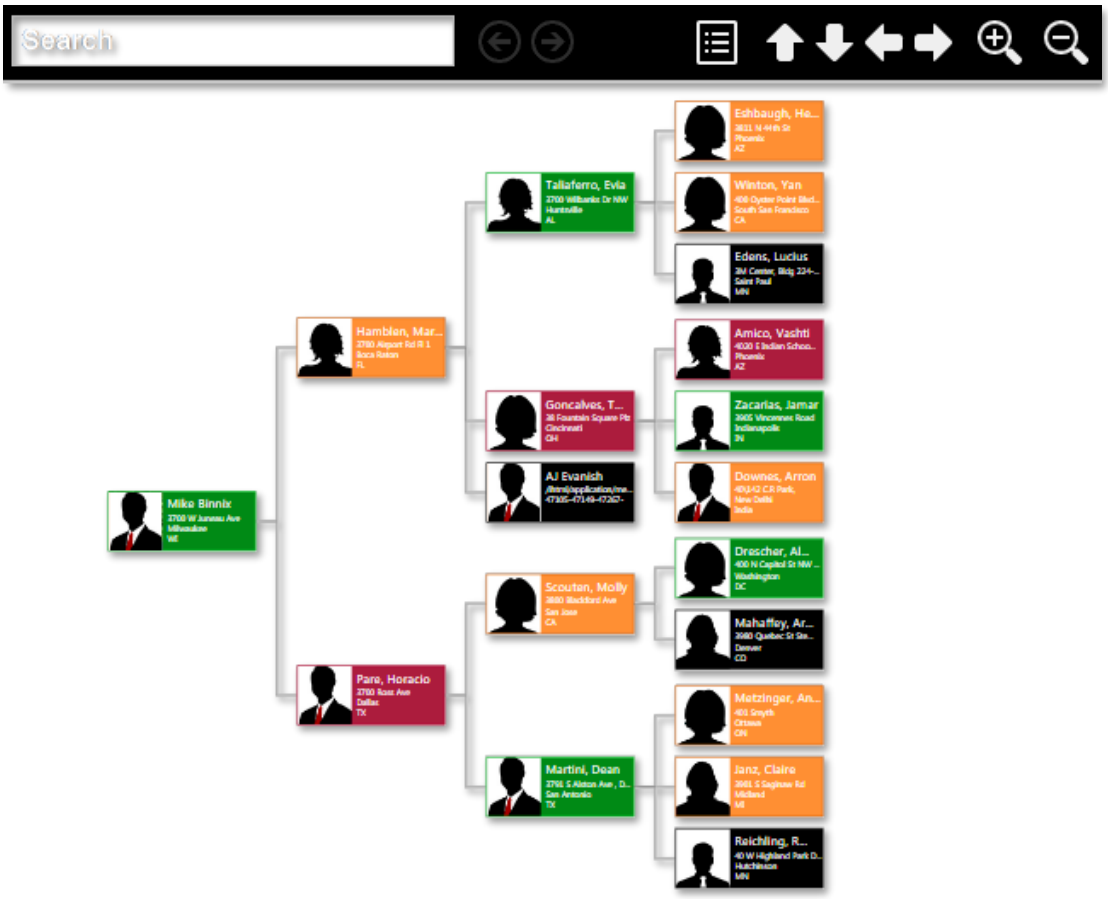
In KMx Version 9.0, Dynamic Reports was integrated with an organizational chart development tool to create KMx Dynamic Charts. While primarily designed to display highly visual organizational charts, this new feature is also capable of rendering other parent/child relationships. Items including course catalogs, K/S Table hierarchies, company hierarchies and other structures can be created using these new tools.

KMx Dynamic Charts are created using the same menu options and forms that are used to create Dynamic Reports. The charts do have required elements to enable the technology to properly construct the desired hierarchy. The required elements include three specific columns:

id – The ID of the item to be depicted (Member ID, Catalog ID, etc.). This must be the first column contained in the dynamic report and must be titled "id".

parent id – The ID of the item's parent (Supervisor Member ID, Parent Catalog ID, etc.). This must be the second column in the KMx Dynamic Report and must be titled "parent id".

Title/Name – The third column contained in the Dynamic Report will become the title for the item in the hierarchy representation (Member Name, Catalog Title, etc.). This column will also become the element that is linked if you decide to link your chart items using Row Link URLs (see below). This column title can be whatever best represents the content of the column.



12.1 Optional columns:

image – If a column titled "image" is included in the Dynamic Report, the Dynamic Chart will display the image for the chart row with the hierarchy element when rendered. For example, if the Member Image URL field is used by your site to store images of your members, adding a column titled "image" and selecting the Member Image URL field would enable the chart to display the picture of the user in the organizational chart.

Color Codes – Individual chart entries can have unique colors based on a calculated function (i.e. Member Certification Due Color Code) or based on values stored in a custom field (member custom 1-20, company custom 1-10, etc.). The output colors available are as follows:

4. _green_
5. _orange_
6. _red_
7. _blue_

These colors are intended to draw visual contrast with the default Color Schemes (see below) and to highlight conditions (good, neutral, bad) within an organizational structure.

The Advanced Run-Time Filter Options page (a popup on the KMx Dynamic Report Edit Form) has all of the options associated with the creation of a Dynamic Chart.

12.1.1 KMX Dynamic Chart Formatting Options

Color Schemes:

- darkred
- pink
- darkorange
- orange
- lightgreen
- green
- lightteal
- teal
- lightblue
- blue
- darkpurple
- purple
- mediumdarkblue
- darkblue
- cordovan
- darkcordovan
- neutralgrey
- black

Chart Orientation:

- getOrgChart.RO_TOP
- getOrgChart.RO_BOTTOM
- getOrgChart.RO_RIGHT
- getOrgChart.RO_LEFT
- getOrgChart.RO_TOP_PARENT_LEFT
- getOrgChart.RO_BOTTOM_PARENT_LEFT
- getOrgChart.RO_RIGHT_PARENT_TOP
- getOrgChart.RO_LEFT_PARENT_TOP

Chart Themes:

- annabel
- belinda
- cassandra
- deborah
- lena
- monica
- eve
- vivian
- helen

13 Google Maps ™ Integration Tools

In KMx Version 9.0 we included tools to enable administrators to output data directly to Google Maps ™. The minimum requirement for Google Maps to display a location pin or icon is a title for the item and an address for the item. Addresses should be at least a city with a state (if in the U.S.) or country (if outside the U.S.). The ability to display popup images (individual profile images, location images, etc.) is included in the integration as well as the ability to hot-link the item to other forms, reports, and site pages. As with KMx Dynamic Charts, the Advanced Run-Time Filter Options page (a popup on the KMx Dynamic Report Edit Form) has all of the options associated with the KMx integration with Google Maps ™. Row Link URLS can be used in conjunction with a map to enable hot-linking from a map to other reports and/or forms.

13.1 Maps based on Tabular Information

A good example of a tabular report that would be suitable for export to Google Maps ™ would be a roster of personnel by address or location. Like KMx Dynamic Reports and Charts, successful hot-linking to other reports or forms normally required the inclusion of a column labeled “id” that contains the unique identifier for the row (or subsequent map point).

13.1.1 Setting the “Map display string” value

Before setting the option labeled “Report is a Map Type” on the Advanced Run-Time Filter Options page, test your report as a report to ensure it is working as desired. This step will also populate the entry labeled “SQL Query” at the bottom of the Advanced Run-Time Filter Options page. This entry can be used as a reference to ensure that the “Map Display String” value is entered correctly.

Example "SQL Query" Entry:

"SELECT members.user_id , members.member_name , members.member_address , members.member_city , members.member_state , members.member_image_url , members.member_custom20 FROM members with (NOLOCK) WHERE members.organization_id=27 and members.member_company_mask like '%47105-%' order by members.organization_id asc , members.member_company_mask asc"

Example "Map Display String" Entry:

[:qt:3 :4: :5:qt, :qt
:2:qt,:qt:7:qt],

Using the two examples above, the "Map Display String" will produce a Google Map ™ with the following characteristics:

[:qt = Begin Google Maps Display String

:3 = from the members table use the member.address

:4 = from the members table use the member.city

:5 = from the members table use the member.state

:qt, = End Address/Location Information for Map Display Point

:qt = Begin Map Point Hover/Click Display

 = Make the Map Display Point a hot-linked entry to the row_link_url

 = Display the individuals image using the member_image_url field in the members table

 = After the image, put a link break into the display

:2 = Display the individuals name using the member_name field in the members table

 = End hot-link

:qt, = End Map Point Hover/Click Display

:qt = Begin Map Marker Display

:7 = Use the color code (_green_, _red_, _orange_ etc.) contained in the member_custom20 field in the members table to produce the map marker

:qt], = End Google Maps ™ Display String

There are an unlimited number of possible entries that can be used to produce the map, hover/click entries and map markers. The example above includes most of the popular entries and methods. Please contact KMSI support for assistance with creating display strings.

13.2 Maps Based on Group/Location Statistical Data

While somewhat more complex than using a simple tabular report to generate a map display, the combination of KMx Dynamic Graph outputs with Google Maps ™ can produce visualizations that combine statistical data with location data. Before setting the Advanced Run-Time Filter Options for the map display, create a Dynamic Graph that produces the location (address, city, state, etc.) information with the associated statistical information (enrollments, delinquent student, schedule classes, etc.) as a Bar Chart. This will ensure that as you setup the Advanced Run-Time Filter Options, you are only focusing on output of the location/statistical information to Google Maps as you build the Map Display String Entry.

Example "Map Display String" Entry for a Map Based on Group/Location Statistical Data:

[:qt:1 :2 :qt, :qt Count of :3 at :1 :2:qt,:qt:pink:qt],

[:qt = Begin Google Maps Display String

:1 = from the members table use the member.city

:2 = from the members table use the member.state

:qt, = End Address/Location Information for Map Display Point

:qt = Begin Map Point Hover/Click Display

Count of :3 at = Short message ("Count of") and the NUMERIC value followed by the word "at"

:1 = from the members table use the member.city

:2 = from the members table use the member.state

:qt, = End Map Point Hover/Click Display

:qt: = Begin Map Marker Display

Pink = Use Pink for the map markers

:qt], = End Google Maps ™ Display String

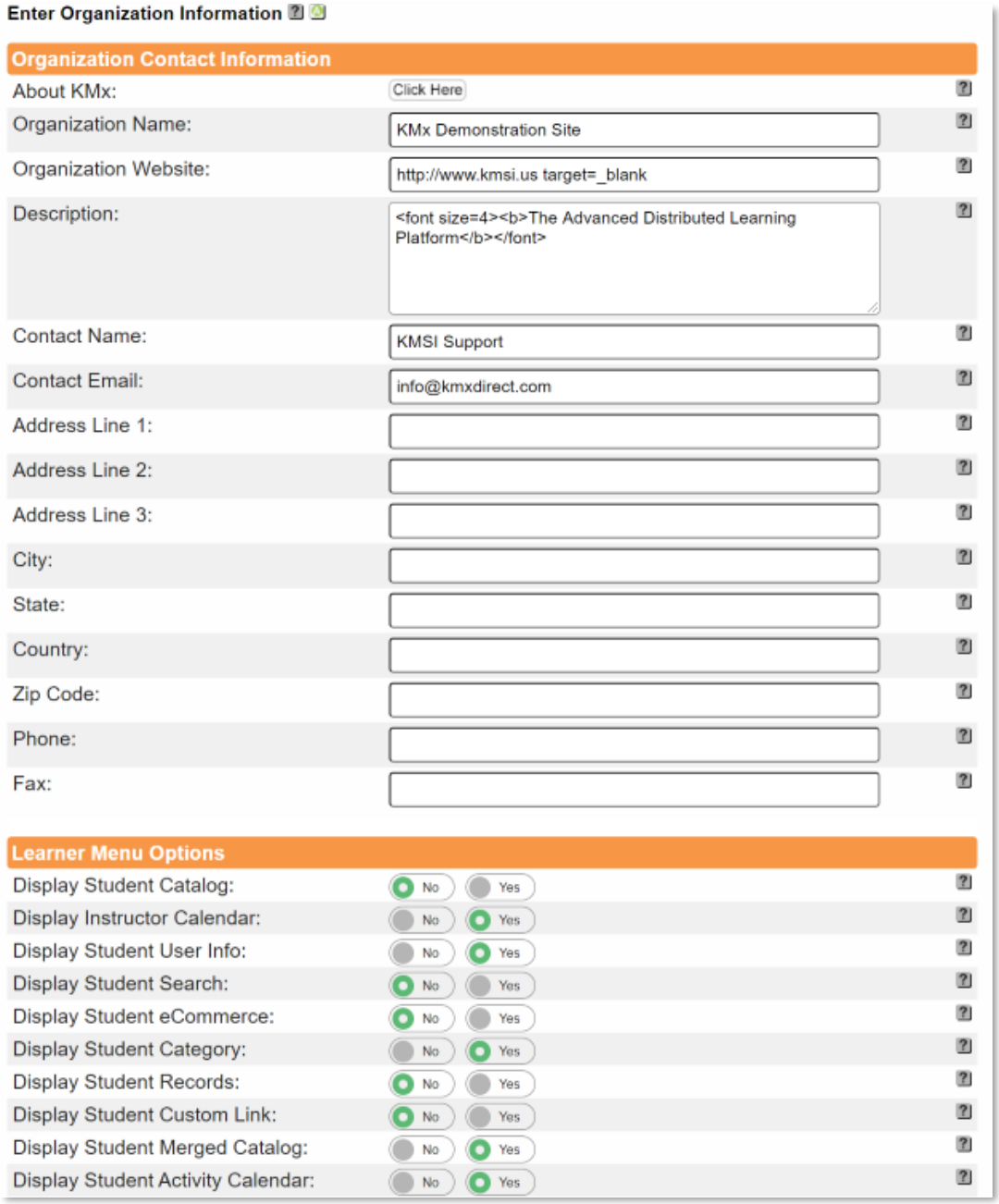
There are an unlimited number of possible entries that can be used to produce the map, hover/click entries and map markers. The example above includes most of the popular entries and methods. Please contact KMSI support for assistance with creating display strings.

Note: Use of Google Maps™ requires acceptance of the Google Terms & Conditions. Restrictions and additional fees may apply. Contact KMSI support for additional information.

14 Setup and System Administration

The most frequently used System Administrative Features are discussed in this topic. KMSI offers an Advanced Systems Administrator course twice each year to provide administrators that have completed our KMx Developer/Administrator Training Program with the ability to leverage certain advanced features of the system. For a complete schedule of KMSI training programs, please visit www.KMxDirect.com.

14.1 Organization Information



14.2 Organization Configuration

Configuration of the primary and default features of the organization is accomplished using the Review Organization Information option under the Setup main menu option. The Organization Information Form is segmented into logical groups of options. Each option is supported by extensive help information to assist the administrator with the selections most appropriate for their organization.

14.2.1 V15 Setup Options

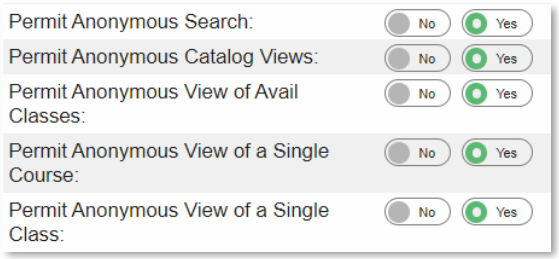
KMx V15 includes significant updates to the student user interface. Traditional site implementations include primary site branding and styling; however, clients can override much of the default CSS entries from the V15 Setup Options group on the Organization Information form. Contact your customer service representative for more information.

14.2.2 Language Resources

In addition to V15 style overrides mentioned in the previous section, clients can update student site displayed language elements in the administrative console. Select Review Language Resources from the Organization Information form, then select the language element for revision. For additional support, contact your customer service representative.

14.2.3 Anonymous Access

Review Organization Information from the Setup tab to enable/disable Anonymous Access features. Anonymous access permits non-logged in users to browse the student interface and access functions enabled from the settings depicted. Anonymous access is useful for advertising course/class offerings before authentication. When leveraging anonymous access features, it's important to permit anonymous access to applicable content records, like course card images (reference section 7.4).



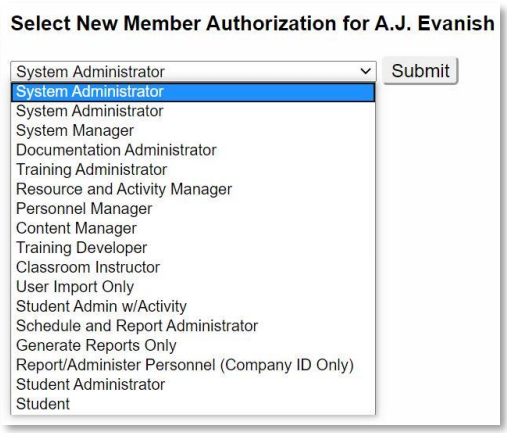
14.2.4 Email Validation

An optional organization setting can be enabled to Validate New Registered User's Email Address. When enabled, an email notice for validation will be submitted to newly registered users.

14.3 Member Authorization Levels

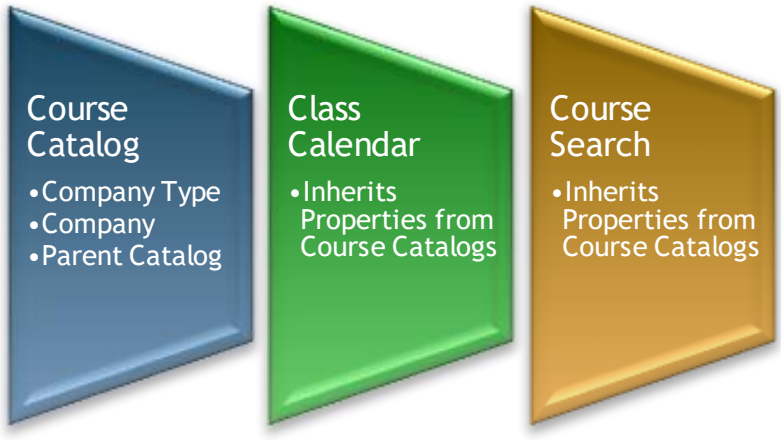
Access to the options available on the KMx Developer/Administrator Interface is regulated by 15 Member Authorization Levels. The levels provide access relevant to roles within an organization and can be customized to support unique client requirements:

To review/change a user's Member Authorization Level, select Setup, then Review Member Authorization Level from the Site Configuration drop-down.

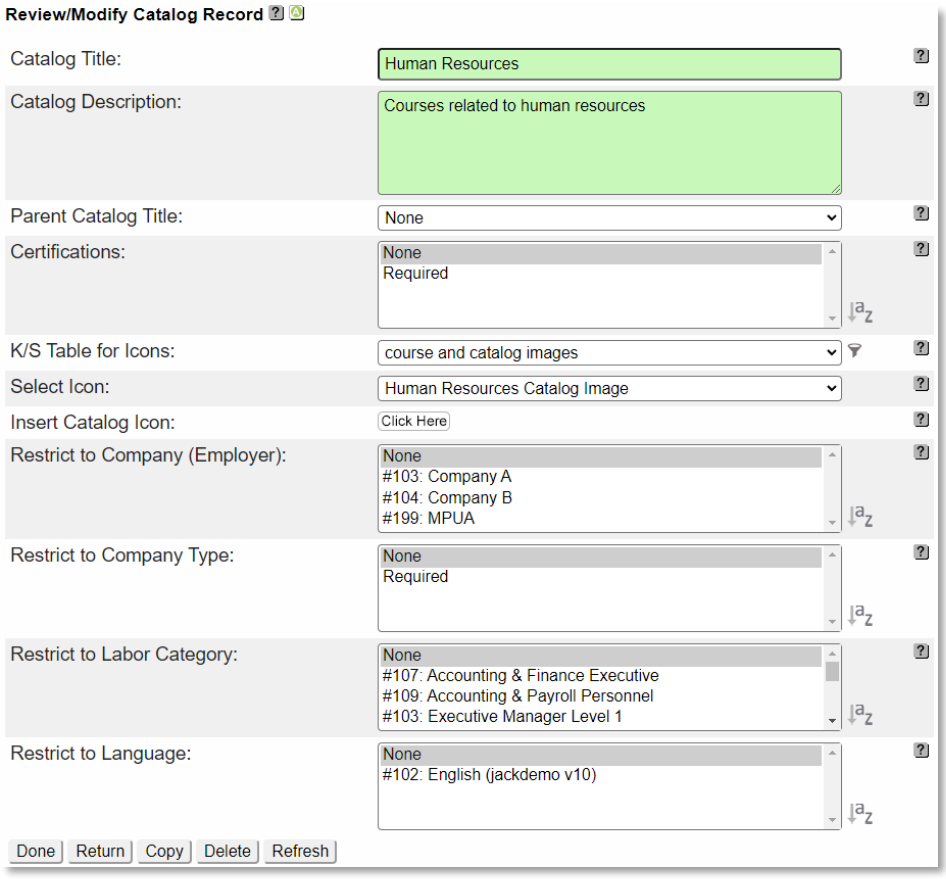


14.4 Catalog Setup

Within KMx, catalogs provide both a method of access for learner enrollment into courses and a security scheme to ensure courses are accessible to designated learner populations. Catalogs can be infinitely nested. Child catalogs (sub-catalogs) assume the security restrictions of their parent catalog and each of its parents. The Insert Catalog Record and the Review Catalog Record options are available under the Setup main menu option.

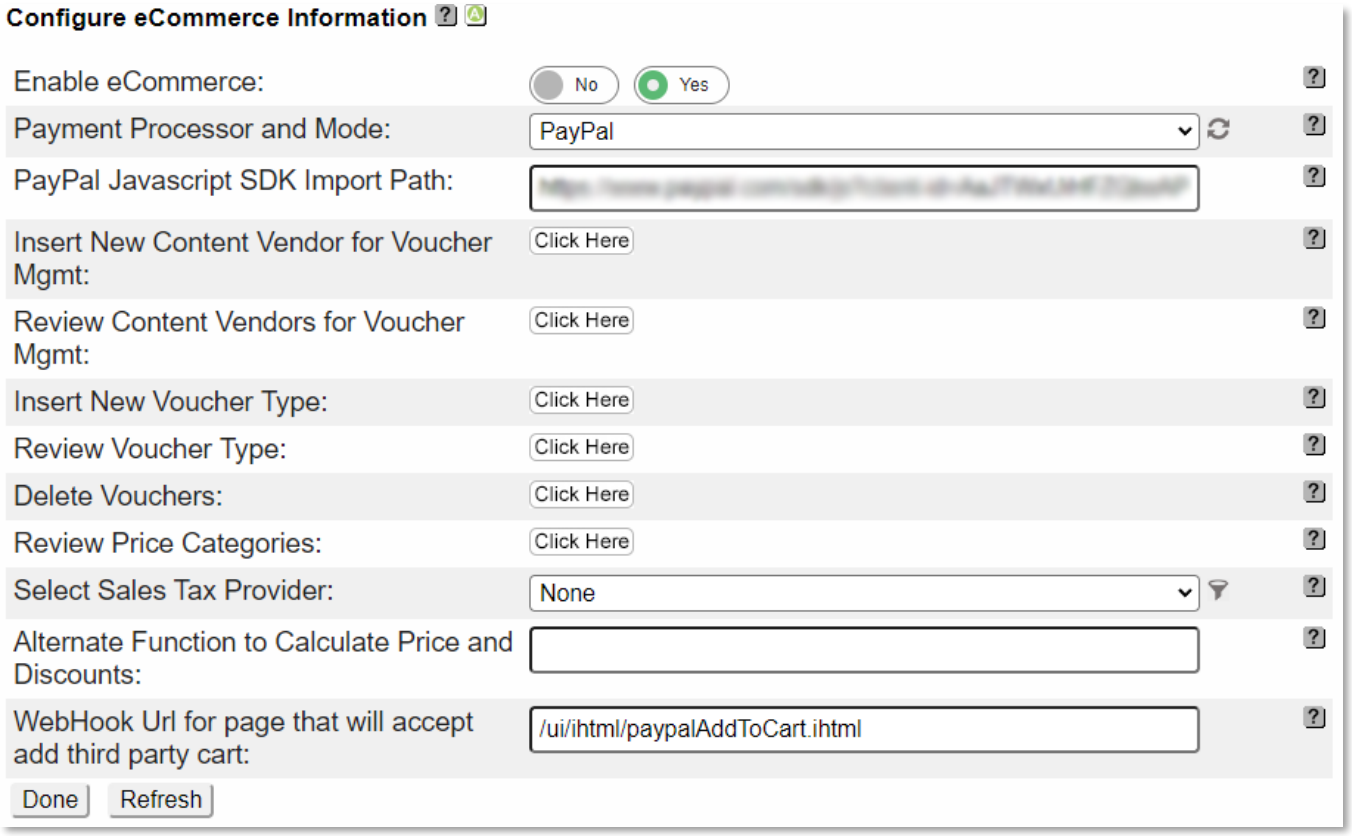


Catalogs include a variety of restriction options: Company, Company Type, Labor Category, and Language. Each of these restriction options includes a "Multi-Select Dropdown" form control element (see right). To select an item, simply click on the desired item. To include multiple selections, use the CTRL key in conjunction with clicking on the additional elements.



14.5 eCommerce Options

KMSI is responsible for the initial setup of the client's eCommerce options. This is normally accomplished during site startup. eCommerce information is accessible from the Setup tab in the Site Configuration dropdown:



Each of these advanced eCommerce features are covered in the KMx Advanced Systems Administration Course. For our complete class schedule, please visit www.KMxDirect.com.

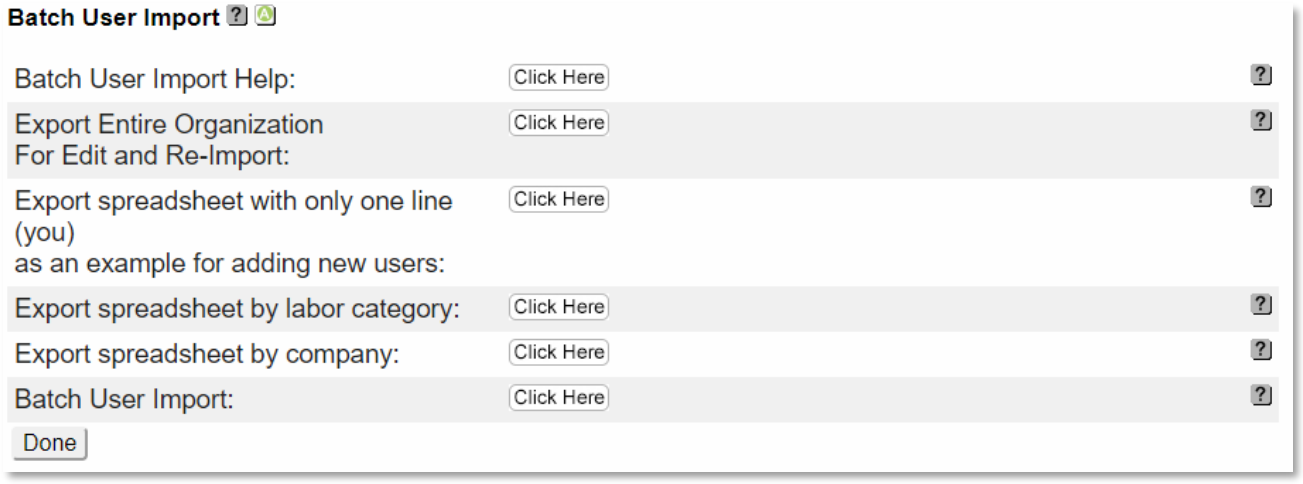
14.5.1 Shopping Cart

KMx includes an option for clients to provide the ability for users to combine multiple eCommerce purchases with nearly unlimited discounting rules and payment options directly from their shopping cart.

The shopping cart approach makes it easy for users to enroll in multiple course/class offerings with a single ecommerce transaction. The shopping cart is an optional element. A Yes/No option is available on the Configure eCommerce Information screen under the Setup main menu option (see image on previous page). If set to Yes, then all eCommerce transactions will be completed using the cart.

14.6 Advanced User Management and Batch Import

To facilitate large-scale personnel changes and member record updates, KMx provides a comprehensive Batch User Import utility provided under the Setup main menu option. The batch utilities are supported by a comprehensive help system that is tailored to the individual organization configuration. Please refer to the Batch User Import Help option prior to using this utility.



The batch user import utility leverages standard Microsoft Excel Spreadsheets (XLS format) to provide the export and import capabilities.

14.7 Email Templates

Email templates are available for review and modification under Setup, Review Email Templates (Site Configuration drop-down). KMx includes the following Email Templates:

14.7.1 Supervisor Approval Request – Email Template

The email to supervisors indicating that an employee has requested permission to take a course is now derived from a template. Previously it was derived from the language pack. This change will let customers more easily maintain the language in the email template.

14.7.2 Send Notification to Instructors when Assigned to Class

Sent to instructors when an administrator has assigned them to instruct a class.

14.7.3 Enrollment by Supervisor with Class

Sent to end-user when their supervisor has enrolled them in an instructor-led class.

14.7.4 Enrollment by Supervisor

Sent to end-user when their supervisor has enrolled them in an eLearning course.

15 KMxLive

KMxLive is a hosted service offered with KMx. The KMxLive interface was designed to deliver measurable interactive training content to participants. KMxLive eliminates the barriers associated with delivery of live training using the internet. It can deliver slides, exams, surveys, polls and SCORM conformant eLearning lessons. With three different room options, KMxLive is the perfect solution for large-scale training and education events or collaborative and interactive classrooms. KMxLive is fully integrated with the KMx LMS/LCMS and supports all blends of learning delivery.

Conference Room: The perfect solution for large-scale training/education events with 100 seats per room.

Training Room: An affordable, feature-rich solution for collaborative and interactive events with up to 20 seats per room.

Testing Room: Virtual technology designed to meet all requirements for high-stakes testing, certification and licensing programs with up to 20 seats per room.

Each of the above room options provides a secure training environment with the following features:

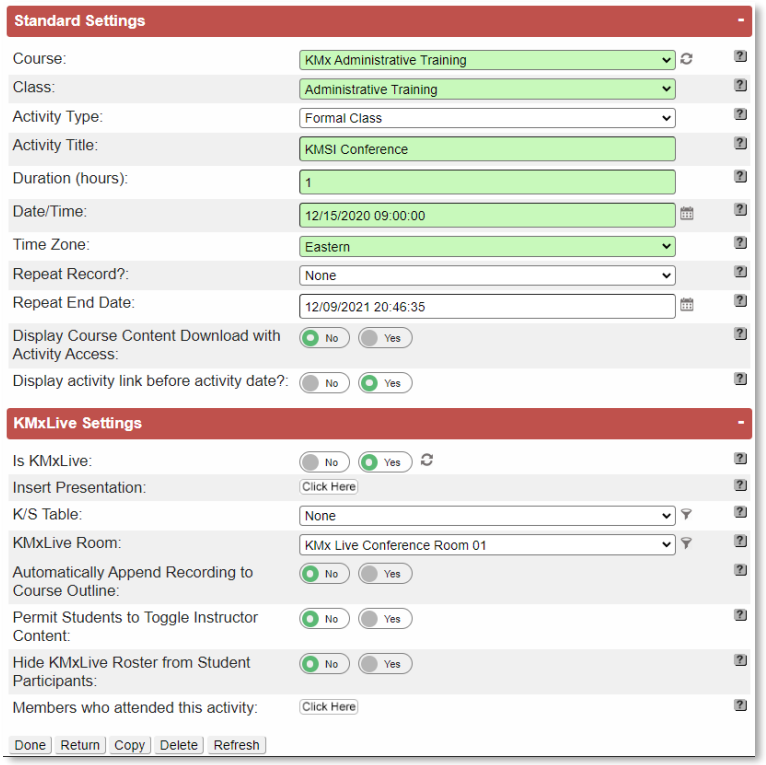
Authenticated Login with SSL Security	**Polling**	**Moderator Webcam/Audio**	**Public Chat Interface**	**Mobile Device Ready**
Session Recording/ Playback	**Emoji's**	**Multi-User Whiteboard**	**Screen Sharing**	**eLearning and Exam Push Delivery**

In addition to the features listed above, the room options provide the additional capabilities listed in the table below:

Feature	Conference Room	Training Room	Testing Room
Maximum Participants	100	20	20
Participant Audio		✓	✓
Participant Webcams		✓	✓
Private Chat	✓	✓	
Breakout Rooms		✓	
Testing Cubicles			✓
Recorded Video Proctoring			✓

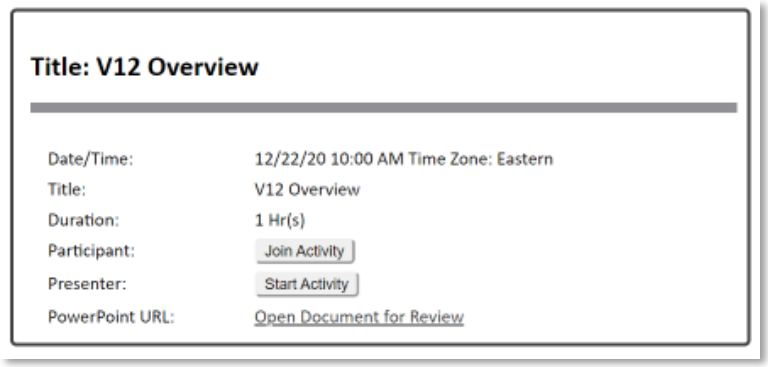
15.1 How to Create a KMxLive Event

KMxLive events are scheduled by creating a class activity record. Select the course and class for your activity, specify the date and time for the event, and turn on the option "Is KMxLive". Enabling the KMxLive option exposes additional settings for your event. Select your pre-configured KMxLive training room from the dropdown menu. If you wish to include a PowerPoint presentation file in your activity, you can select it from the corresponding dropdowns. You can also send content to students during KMxLive sessions for completion by adding it to your course outline (see section Sending Content to Students for more information). For large events intended for students to listen only, you can also configure the activity to block students from using their mic and camera.



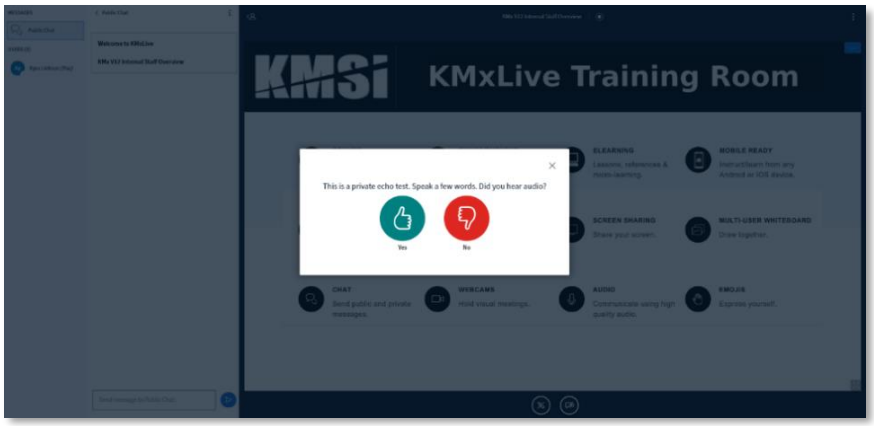
Once all selections are complete, click done. The activity calendar will display the event for all students enrolled.

15.2 How to Use KMxLive as a Student



Launch a scheduled event from the Activity calendar (depicted above) and on the menu shown to the left, select “Join Activity”. Note that presenters will utilize “Start Activity” to initiate the event.

Students will then be redirected to a KMxLive conference room. Select “Microphone” or “Listen Only” to choose how to participate.



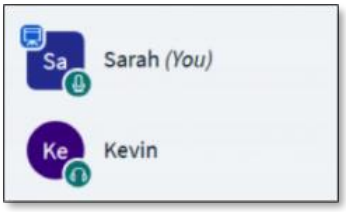
Follow the prompts to test your audio connection. If audio test is successful, click "Yes." If audio test was not successful, click "No" to check microphone settings.

Students have the following capabilities unless restricted by a Moderator:

- Share audio & webcam
- Chat/use emoji's
- Respond to polls
- Respond to invites for breakout rooms
- Answer Poll questions

Moderators can also assign students additional capabilities:

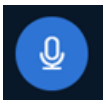
- Use the annotation tools
- Show an external video



Moderators are represented by a by a square icon while students are represented by a circle icon. If given the role of presenter, an additional small podium icon will show in the top left corner of a user icon.

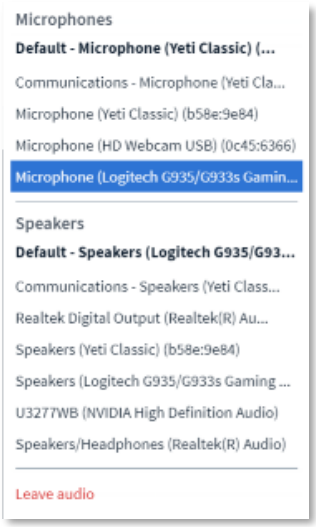
15.2.1 Microphone, Audio, Webcam and Screen share toolbar

At the bottom of the classroom screen is a toolbar where the following icons can be enabled/disabled:



Microphone Mute Icon

Use this icon to mute and unmute your microphone during a classroom session. Participants entering events with Listen Only will not have a microphone icon displayed. Use the Change/Leave Audio icon to leave audio and rejoin using microphone audio.

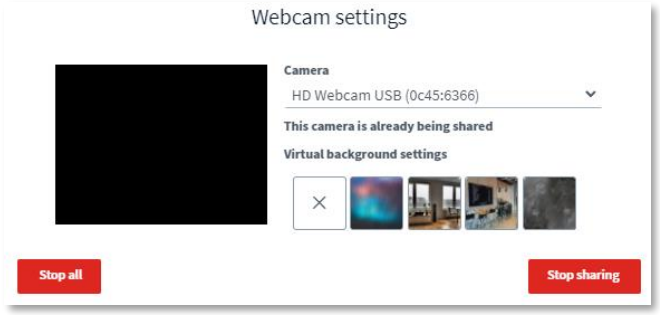


Change/Leave Audio Icons

These icons turn audio input on and off. When joining the audio connection with microphone enabled, the speaker icon displays. When joining as listen only, the headset icon displays. Select the blue portion of either icon to leave the audio connection and/or reconnect. Select the down arrows to expand the menu (right image) and change audio device settings.

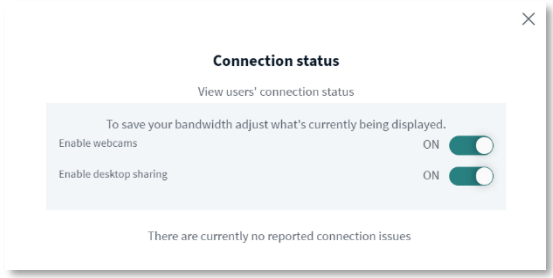
Webcam Icon

Use this icon to enable and disable webcam sharing. Once enabled, webcam settings allow for camera selection, quality, and optional virtual backgrounds. To change your camera settings, including virtual backgrounds, select the down arrow to view the webcam settings menu (below). Note that enabling webcam sharing can be bandwidth intensive.



Screen Share Icon

Select this icon to share your desktop with KMxLive event attendees. You can select your entire screen to share or a specific application. Students do not have the ability to share their screen unless granted by a moderator. Moderators can select a participant from the left-hand user window, then select Make Presenter. Once promoted to presenter, the screen share option becomes available to the participant. Note that the current presenter also has control of the presentation window and can navigate the slide deck (if loaded).



15.2.2 Connection Status

Users experiencing connection issues can save bandwidth by adjusting what's currently being displayed. Click the Connection Status icon to view the Connection Status window and enable/disable the ability for webcam or desktop sharing.

15.2.3 Screen Layout Management Options

When viewing multiple windows, such as webcams and presentation files, click and drag the webcam window to snap it to a different location on-screen. Webcam display defaults to the top, but you may position the webcam window to the left, right, or bottom. Click and drag the space between the webcam and presentation window to adjust window size and select the best screen layout for your device and personal preferences.

15.2.4 Pushed Content Display Modes

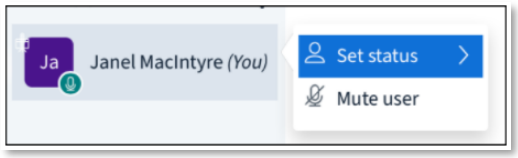
By default, pushed content (exams, games, simulations, etc.) will display in the slide/whiteboard area. When content is pushed by a moderator, an expand control (upper image) displays in the lower-right corner of the KMxLive participant interface, near the hand raise icon. Once expanded to full screen, the icon changes to a collapse control (lower image). This feature is also available with the session on-demand replay interface.

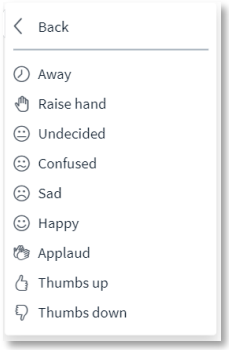
15.2.5 Toggle Display

After content has been pushed, use the "Toggle Display" button in the lower left to switch views between pushed content and the KMxLive room.

15.2.6 Setting a Status/Emoji

Emoji's can be used to indicate status during a KMxLive event by selecting your student icon on the left side of the panel, then selecting "Set status."





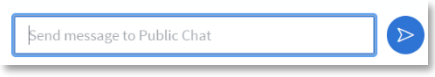
A drop-down list exposes available emoji options. Selected emojis will appear on the student icon. To clear the status, simply select your student icon and select "Clear Status."

15.2.7 Hand Raise Icon

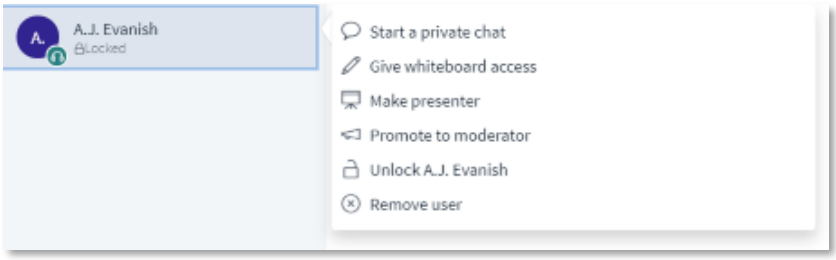
Use this icon to quickly enable the Raise Hand status. This status may be set using the status drop down (above) or use this button to quickly raise and lower hand.

15.2.8 Messages (Public and Private)

Public and private messages can be accessed under the Messages tab on the left side of the event window. Type a message in the public chat box and press Enter to submit or use the Send Message icon.



Moderators and participants can also privately message each other by selecting the user's name, then Start a Private Chat (lower-left image). Once a private message is initiated, you can alternate between public and private chats by selecting the corresponding chat in the Messages section (lower-right image).



15.2.9 Keyboard Shortcuts

Keyboard shortcuts can be accessed through the Settings Menu on the top right-hand corner of the session window.

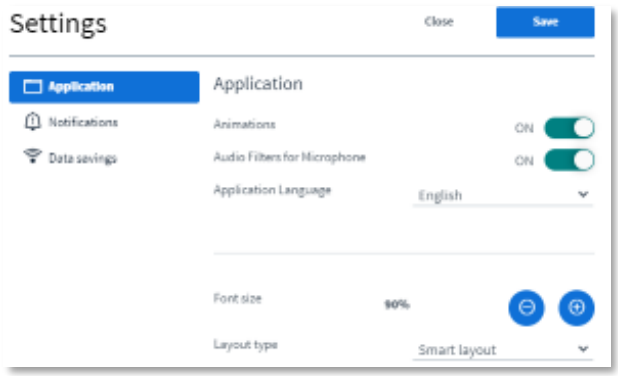
15.3 How to Use KMxLive as a Moderator

Moderators have all the capabilities of students plus the following:

- Manage viewer's audio (Mute/unmute)
- Lockdown viewers (i.e. restrict them from private chat)
- Start a poll and publish poll results
- Assign anyone (including themselves) the role of presenter
- Create breakout rooms for student discussions
- Write closed captions
- Start/Stop Recordings
- End Meetings

15.3.1 Settings Menu

Settings menu can be accessed on the top-right side of the session window. A variety of session settings can be adjusted including animations, alerts, and application language. Various screen layout options are also included that allow moderators to push a specified format that overrides student settings.

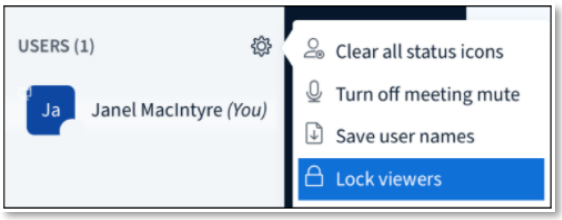


15.3.2 Mute Students

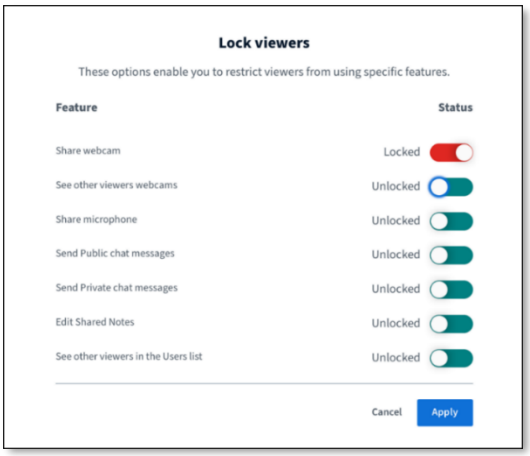
Moderators can manage student's audio by muting all students or an individual student. To mute/unmute all students, select the gear icon on the left side of the session window and click "Mute all users."

To mute a specific student, click their name and select "Mute."

15.3.3 Lock Students



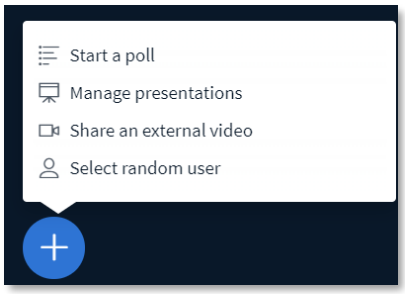
Moderators can lock students to prevent them from using various features within a classroom, including public chat, microphones, webcams, and shared notes. To lock all students, click the gear icon on the left side of the session window and select "Lock viewers."



In the lock viewers window, select the features you would like to lock, then click apply. Once a feature is locked, the toggle will turn red. To lock/unlock an individual student, select their name and click "Lock/unlock."

15.3.4 Using Polls

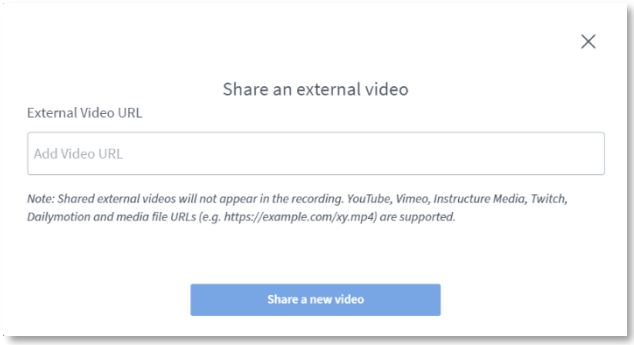
Polls are a great way to interact and collect real-time insight from students. To start a poll, click the "plus" icon located at the bottom of the event session window, then select "Start a poll."



There are preset poll types such as true/false, multiple choice, or create a custom poll. Once the type of poll is selected, create poll questions and then prompt students to answer the questions. When most participants have answered the poll, select "Publish polling results" to display the results.

15.3.5 Sharing External Video

Moderators can quickly share external videos with attendees. When using the Share an External Video function, the presentation file window is replaced with the shared video. Note that videos shared with this method will not be included in the recording. Use the push content feature instead if you would like to share videos and include them within recorded output. After sharing an external video, use the action button again to select "Stop Sharing External Video" and return to the loaded presentation file.



15.3.6 Select Random User

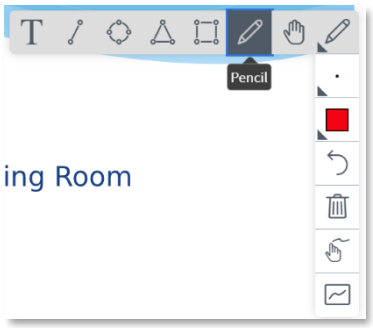
Use the Select Random User function to choose a user from the KMxLive event at random. Moderators can leverage this function to assist with user engagement. The selected user will be notified on-screen.

15.3.7 Assigning Presenters

As a Moderator, presenter can be assigned to any student to allow them to control the presentation by clicking their name and selecting "Make Presenter." A presenter can upload slides, annotate the current

side with the whiteboard controls, enable/disable multi-student whiteboard, start polls, and screen share. Once the presenter has finished their presentation, control can be taken back by clicking on the Moderator's name and selecting "Take Presenter role."

15.3.8 Annotating a Presentation



Annotation tools allow the presenter to highlight and annotate slides in the presentation window. The annotation toolbar can be found on the right side of the presentation window.

Hand Icon
Allows the presenter to pan and zoom in on the presentation.

Pencil, square, triangle, circle, diagonal line, and T Icons
Allows the presenter to mark and annotate the presentation with text and graphics.

Small Circle Icon
Allows the presenter to select different line widths for the annotations.

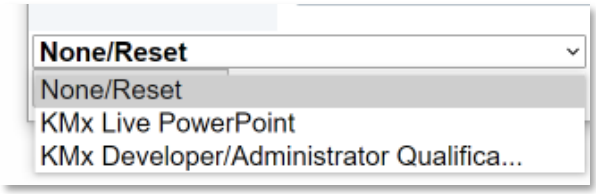
Rectangular box Icon
Allows the presenter to select a color.

Backward Arrow Icon
Allows the presenter to remove the most recent annotation.

Trash Bin Icon
Allows the presenter to clear all the annotations added to the presentation.

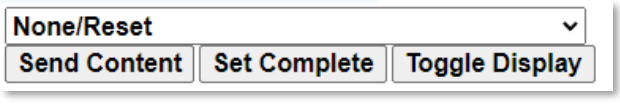
Rectangular Box Icon
Allows the presenter to turn on the multi-student whiteboard.

15.3.9 Sending Content to Students



Once content is uploaded to the course outline, it can be sent to students during a KMxLive session. At the bottom of the session window there will be a drop-down menu.

Select the content to send to students, then click "Send Content."



When the content is sent to students, their interactions with the content will be recorded in the student's grade book. The content window will display on the student screen until the moderator selects

"None/Reset" and clicks "Send Content". The moderator can toggle between the content display and the KMxLive interface display with the button labeled "Toggle Display."

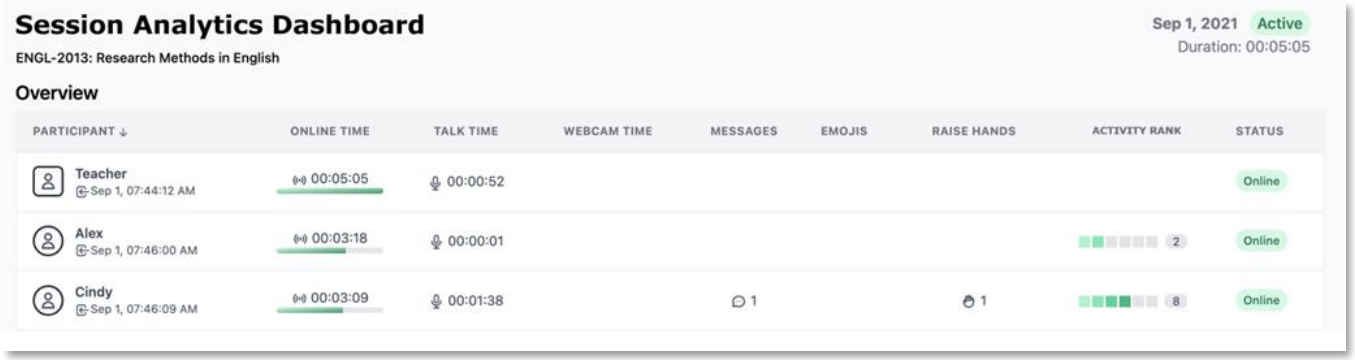
15.3.10 Presenter/Moderator Dashboard

The dashboard provides presenters and moderators with a togglable display that reports real-time participant data during a live session. While no content is pushed, use the "Toggle Display" button to change view of the presentation window to the dashboard. Clicking on a participant's name will open the participant's gradebook for more detailed information. Status indicators are color-keyed to enable presenters/moderators to quickly identify participant issues and superior performance.

ID	Name	Score	Attention %	Complete %	Status	Location	Role
45123	Dave Smith	n/a	100	n/a	n/a	Baltimore, MD	Moderator
41145	Cheryl Gonzalez	100	88	100	Completed Satisfactorily	Linthicum, MD	Participant
43665	Jenny North	96	88	100	Completed Satisfactorily	San Francisco, CA	Participant
43125	Belinda Davis	84	96	100	Completed Satisfactorily	Detroit, MI	Participant
46143	John Munson	84	89	83	Not Completed	Boise, ID	Participant
43765	Collin Green	76	91	83	Not Completed	Yuma, AZ	Participant
44080	Steve Yung	58	98	100	Completed Unsatisfactorily	Rochester, NY	Participant
41264	Connie Johnson	80	100	83	Not Completed	Cleveland, OH	Participant
42123	Olivia Rivers	76	100	83	Not Completed	Ft. Meade, MD	Participant

15.3.11 Session Analytics

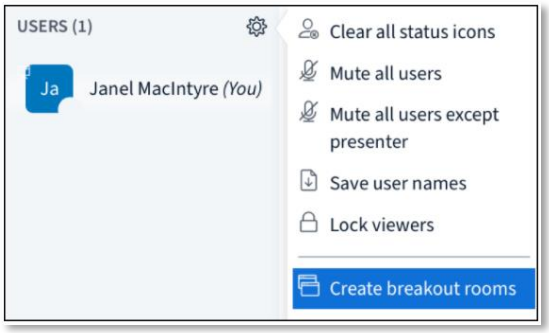
Moderators have access to real-time session analytics, by participant, during a live session. Select the gear icon on the left menu, then click "Session Analytics." Analytics provide details for online time, talk time, webcam time, public and private messages, use of emojis, hand raise events, activity and engagement ranking, and current connection status.



15.3.12 Creating Breakout Rooms

Breakout Rooms can be launched during any classroom session to aid in small group discussions and student collaborations. Breakout rooms can be created and managed from the main session window by clicking on the gear icon and selecting "Create breakout rooms."

On the Breakout Rooms page, select the number of rooms, duration (minutes), and manually, randomly, or allow students to choose a breakout room to join. Moderators can manage breakout rooms by accessing the Breakout Rooms control panel on the left side. Moderators can join any breakout room and end all breakout rooms. If a student exits a breakout room, Moderators can re-assign them by sending a breakout room invitation. Simply select the gear icon and click "Breakout room invitation."

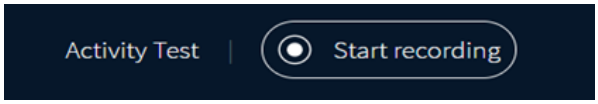


15.3.13 Closed Captioning

Moderators can use the live closed captioning feature for students with audio accessibility barriers or students who prefer to use them. Closed captioning can be accessed by clicking the gear icon on the left side of the session window and then selecting "Write closed captions." In the pop-up window, select the language and click "Start." Closed captions can be exported into either HTML or Plain text.

15.3.14 Recordings

Sessions can be recorded in KMx Live by simply selecting the Start/Stop Record button at the top of the screen next to the meeting name.



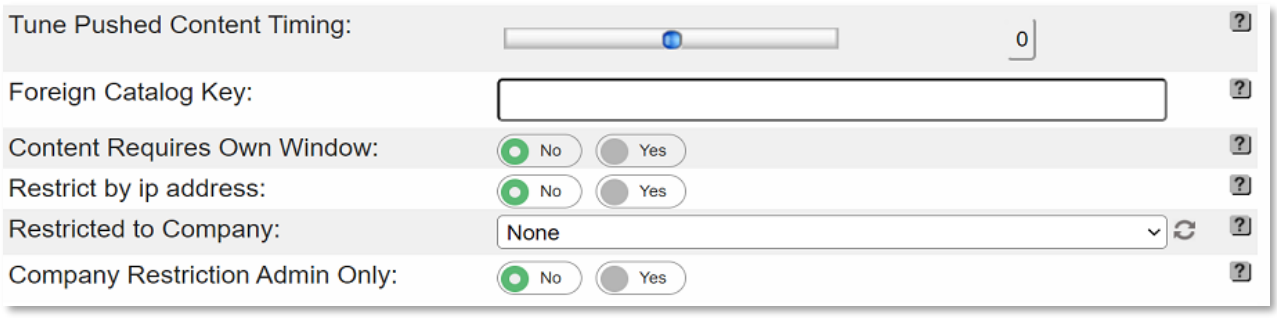
If the instructor opts to record a KMx Live activity, KMx Live will begin preparing the recording for playback immediately upon completion of the live activity. This preparation time typically takes 1 - 2 x the duration of the activity. Once this preparation is complete, the recording is saved to KMx as a content record. The Instructor will receive an email notification that the recording is available. The email will also include the details of what K/S Table hosts the content record and the content record title and id number. This content record may then be included at the instructor's discretion in future online course offerings or as a standalone reference exposed via content search.

While setting up your KMx Live event, there's also an option to "Automatically Append Recording to Course Outline." When enabled, this setting will automatically add your recording as the final content object within your course. If disabled, a recorded content record will be created without assignment to the course outline.

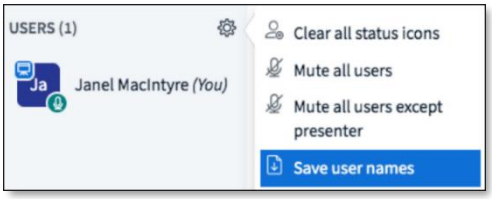
15.3.15 Adjust Timing of Recorded Pushed Content

Moderator workstation latency can introduce slight variations in content timing during replay. You can adjust the timing of pushed content during your recorded KMx Live event by reviewing the recorded session

content record and adjusting the slider titled "Tune Pushed Content Timing". A positive number will delay the display of pushed content by the seconds entered. A negative number will accelerate the display of pushed content in seconds.



15.3.16 Exporting Attendees List



An attendee list can be exported by selecting the gear icon in the User menu and then selecting "Save user names."

A .txt file will automatically begin downloading.

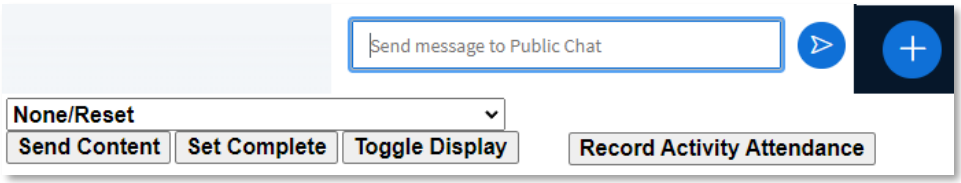
The attendee list can also be exported from the statistics button if the session is recorded. See Recordings section of manual for more information.

15.3.17 Updating Attendance Record

Attendance can be recorded by clicking "Record Activity Attendance" (below image).

During a KMx Live training class, the instructor has the option to capture an attendance list of members participating in the live session. This information is recorded to the KMxLive activity. If that activity is the only activity for the class, then each participant is also marked present for the entire class and the class evaluated to see if he or she has completed all requirements.

If the class consists of multiple activities, instructors should wait until all activities are complete and then evaluate attendance at each activity before giving members credit for overall class attendance. This affords the instructor an opportunity to exercise discretion if, for example, a student attended 4 of 5 activities, to determine if he's satisfied the class requirements and should be marked complete or not.



15.3.18 Updating Completion Status

Completion status is set for all active participants when using "Set Complete" (above image). Set Complete processes the course autocomplete function. A participant's completion status is determined by passing score (if set) and course autocomplete settings. If "Course Only Requires Passing Grade" is enabled, only a

passing score is required for satisfactory completion. If students are allowed to retake scored content on-demand, enable "Have Course Autocomplete" on the course record rather than using "Set Complete."

15.3.19 End Meetings

Only Moderators can end KMxLive meetings by clicking the settings menu and selecting "End meeting."

16 Web Services

KMx is supported by a number of web-services that have been created to enable customers to provide integration with third-party technologies and craft their own user experience by leveraging XML, XSL and SOAP technologies. The web-services are advanced tools that are covered in our KMx Advanced Systems Administrator Course. For our complete class schedule, please visit www.KMxDirect.com.

16.1 Catalog web service

This read only service provides customers a means to query the KMx course catalog for course titles, descriptions, access restriction information and ecommerce details such as pricing and discounts. This service also includes classes and schedules. This can be useful for customers who wish to market training offerings on other web sites. KMx can serve as the master record of all training offerings, while allowing other sites to advertise the offering details.

Some customers may also find it useful for integration with HR systems, allowing the KMx platform to serve as a master record of training offerings while keeping the HR system up to date with course numbers, titles and descriptions.

16.2 Company web service

This service allows customers to retrieve and maintain a list of companies (subordinate organizations) in KMx for their organization. This service is intended for large organizations that operate many divisions, or have large groups of dealers, resellers, or customers operating as independent entities within their KMx implementation.

16.3 Course Finder web service

This service provides methods to search for course and class offerings by topic, date, and location. Location based searches can be by state or by zip code + radius. It will complement the Catalog Service by allowing customers to provide search functions from within their own portal or intranet web interfaces before redirecting interested users to the KMx interface for registration.

16.4 Enrollment Web Service

This is a read only service with a variety of methods allowing users to query the enrollment status of an individual in a course, a list of courses, or a list of individuals in a course. The result sets returned can be used in a wide assortment of applications including:

- Custom Reporting
- Data-warehousing to merge to correlate with other corporate performance, or personnel data
- To implement access rules to applications or systems that have training pre-requisites

17 Integration and Session Security Management

17.1 Single Encrypted Session Variable

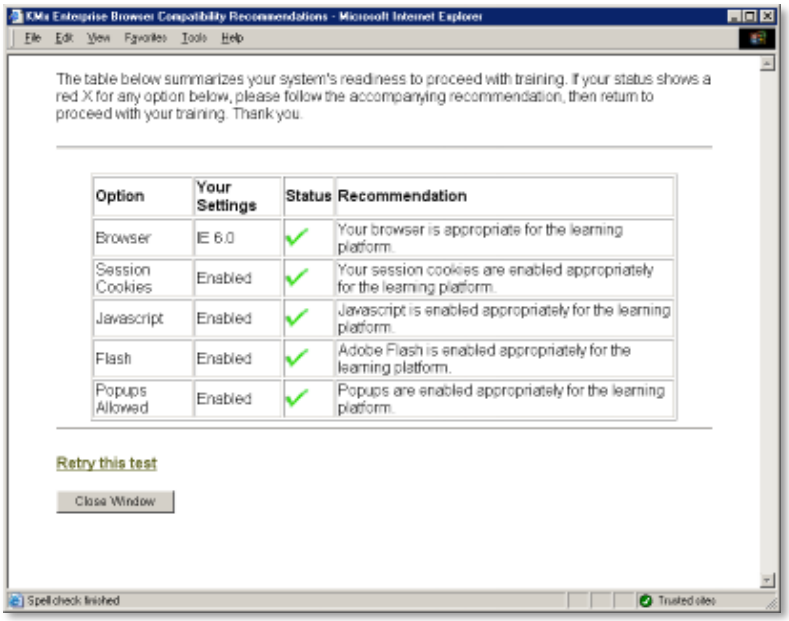
Early releases of KMx relied on multiple encrypted session variables (also known as soft cookies) to maintain session identification and security information. This approach is commonly used by banks and other secure sites to identify user permissions and attributes during navigation of a website. We have preserved this approach which has been extremely successful with our clients. Clients that completed their KMx startup after January 2011 use a new approach that consolidates the multiple variables into an encrypted data string. This new option will allow clients that require space in the session variable header to have soft cookies to support their portals, site monitoring services and other content that require access to the session header.

17.2 Single Sign-on

Single sign-on facilitates direct access to specific administrative functions. Customers can direct supervisors and company administrators to specific functions by specifying the form_id and other parameters as part of their integrated access path from intranets, portals or other websites set up as KMx access points.

18 Student Workstation Testing

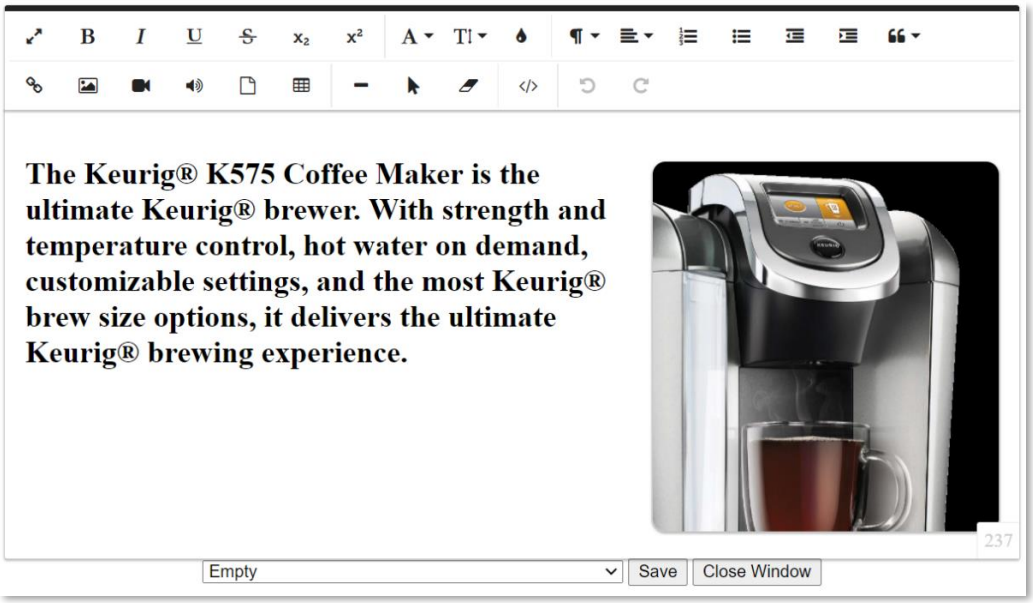
KMSI hosted clients have access to our student workstation testing system. This third-party software is capable of determining the end-user's browser and workstation configuration to quickly isolate issues. The system provides the user with the remediation links to resolve any detected issue(s). This testing system is configurable to client specifications regarding browsers, plug-in requirements, Java versions and much more.



19 KMxAuthor

In the KMx V12 release, we have added the functionality of the Froala Editor. This suite of tools enables developers to leverage the Site Student Interface CSS Style Sheet to provide courseware that maintains the look and feel of the client site with minimal effort. The editor enables the developer to include text, image, audio, video, tables, and PDFs with links using drag & drop controls with a myriad of features to stylize each element. The resultant output is fully SCORM conformant and provides all user access, time monitoring and completion status recording.

KMx V10 WYSWYG HTML Editing Interface

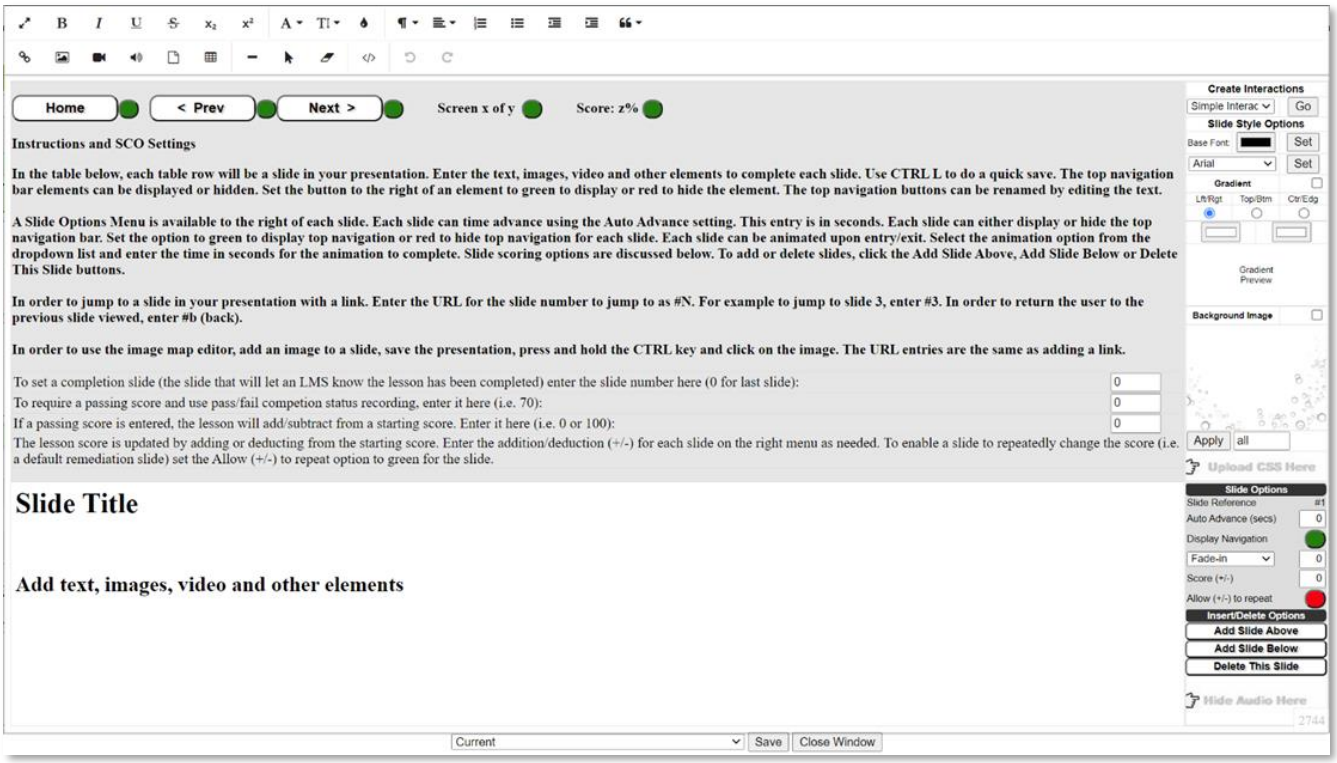


This new feature is fully integrated with the KMx Course Outliner. Select "KMxAuthor" from the Course Options menu and follow the prompts to create a new Content item automatically added to your course outline. Editing the content record is accomplished by selecting the item from the course outline and pressing "Edit Content". KMxAuthor content can also be inserted into the content management system and edited from the Content main menu.

19.1 How to Use KMxAuthor

KMxAuthor is designed to enable rapid development of learning modules for stand-alone use or in conjunction with the KMx Course Outliner to create a larger eLearning program or training continuum. Instead of following the traditional approach of other tools, like Articulate and Captivate (which require use of a local desktop application for development and packaging training for upload to a learning management system) KMxAuthor is a 100% online system.

Start by selecting “KMxAuthor” from the course outliner. Enter a title for your content and select “Next.” The lesson development interface loads with a header that includes basic instructions for use of the tools.

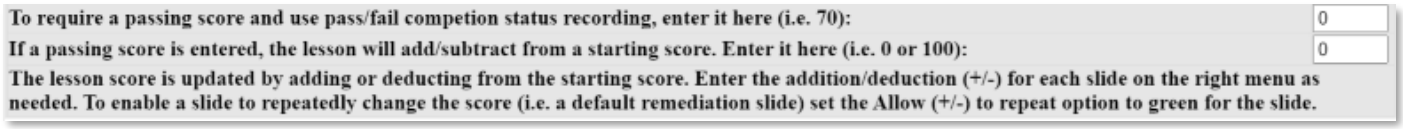


19.1.1 Completion Slide

To set a completion slide (the slide that will let the LMS know the content has been completed) enter the slide number into the box next to “Completion Slide”. You may also leave the completion slide set to “0” which will default to the last slide.

19.1.2 Passing Score

To require a passing score, enter a value into the appropriate box. For score to be calculated, your slides must be set to add or subtract score. If a passing score is entered, the lesson will add/subtract from the value input for starting score.



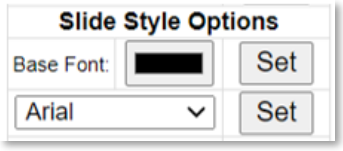
19.1.3 Save and Quick Save

Like many applications, it is suggested to periodically save your work. You can save your work at any time by selecting the "Save" button on the bottom of the page. You can also perform a quick save at any time by clicking "CTRL – L".

19.1.4 Layout and Formatting

The upper-menu bar provides numerous options to format your slides. There are various choices to customize your text, alignment, and spacing along with options to include images, video, and audio.

19.1.5 Base Font



To select a default font color, select a color from the color-picker next to "Base Font" and click "Set". To select a default font face, select a font type from the dropdown and click "Set".

19.1.6 Background and Navigation Button Formatting

If you would like to apply a gradient background to your slides, select the checkbox next to "Gradient". Next, choose the direction of the gradient by selecting the appropriate radio button. Lastly, you can select the gradient color combination by selecting the two colored boxes. A preview box is available to display your color and direction combination.

To change the background image, select the image placeholder box and click "Replace". Drag and drop an image into the "Drop Image" box or click to browse.

To apply the new background, select the checkmark next to Gradient or the checkmark next to Background Image (or both), and then input the following in the box next to "Apply": Enter "all" to apply the change to all slides and the navigation buttons. Enter slide number (or slide numbers separated by comma) to apply to selected slides. Enter "buttons" to apply the gradient to only the navigation control buttons. Enter "reset" to reset to the initial state. When finished, click "Apply". In the image, a gradient background will be applied to slides 1, 3, and 5.

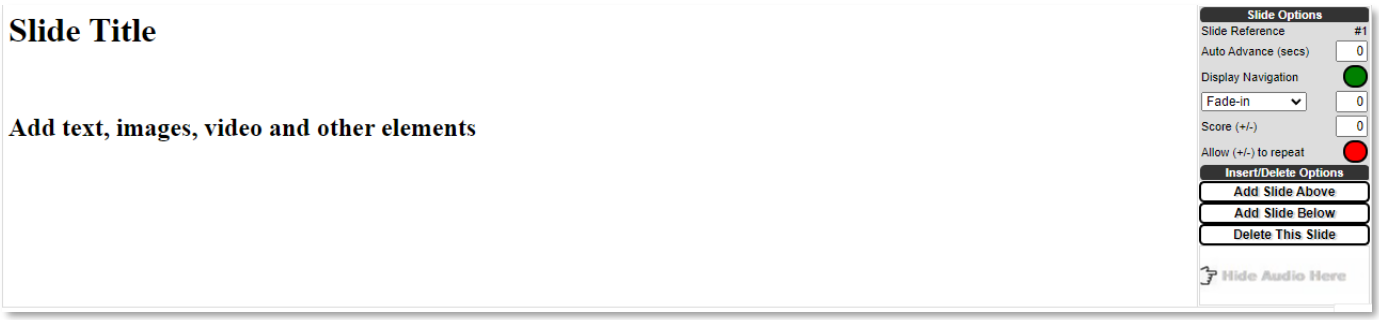
Note: Background images and gradients can be used together to create a layered effect. Using a PNG format image with transparency is recommended to achieve the best results.

19.1.7 CSS Files

Text files (.txt) containing standard CSS entries can be inserted into the presentation in the area designated "Upload CSS Here" illustrated above. This is an advanced feature. All basic CSS entries (backgrounds, fonts, colors, etc.) are supported.

19.1.8 Adding and Removing Slides

Each table row represents a slide in your presentation. To add a new slide, select "Add Slide Above" or "Add Slide Below". A new table row (slide) will be added above or below your current row (slide). To delete a slide, click "Delete This Slide". Each slide contains a "Slide Reference" number so that you can easily identify slide location to assist with navigation.



19.1.9 Navigation Controls and Header Display

Standard navigation controls are included on each slide header. To progress through the slide deck, use the "Prev" and "Next" buttons. To return to slide one, click the "Home" button. Navigation buttons can be suppressed entirely by selecting the green icon next to each button. Disabled buttons are represented with a red icon. Note that the navigation button labels can also be edited.

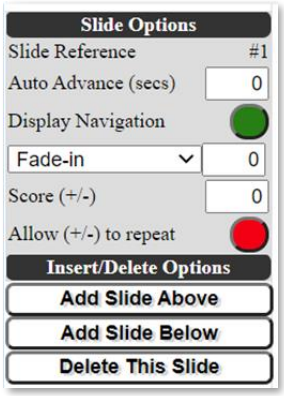
In addition to navigational buttons, each slide can also display slide number and total score. By default, these options are enabled which is signified in green. To disable slide number and/or score, change the radio button to red next to "Screen x of y" or "Score:".

You can also navigate slides by including links (19.1.13) or hotspots (19.1.14). If you choose to use this method of navigation, you can disable the standard navigation buttons on each slide by clicking the green icon next to "Display Navigation". A red icon indicates that navigation buttons are disabled; thus, a user must progress through links or hotspots.

19.1.10 Auto Advance

Slide navigation can be accomplished automatically via user-specified time. Input the number (in seconds) into the "Auto Advance" field (see image in 19.1.11), and your presentation will automatically progress to the next slide once that time has been reached. Note that this setting will trigger slide advance regardless of any hotspots or navigational links. If your intent is that the user must click on a specified area to progress, we suggest leaving "Auto Advance" set to "0".

19.1.11 Slide Transitions and Animations

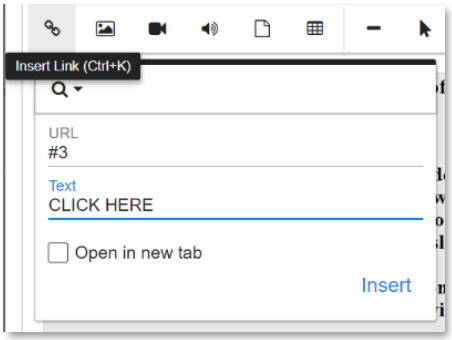


There are various animations that can be applied to slides and images. In the "Slide Options" menu, you can select a slide transition from the dropdown below "Display Navigation". Input a value next to your selected slide transition to specify the length (in seconds). If the value is left to the default of "0", no transition animation will display.

19.1.12 Slide Scoring

When implementing a passing score with KMxAuthor, you must utilize the scoring settings under "Slide Options". Slides can add or subtract points to the value input for starting score. If your slide is worth 20 points, input "20" into the "Score" field. Conversely, you can enter "-20" into the scoring box to deduct 20 points. To repeat the addition or subtraction of score on a particular slide, select the icon next to "Allow (+/-) to repeat". This is useful when leveraging a default remediation slide.

19.1.13 Links

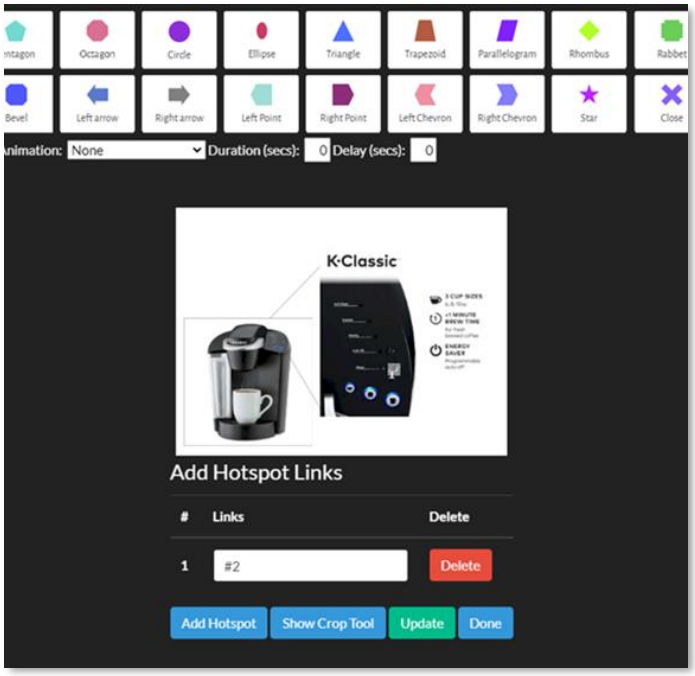


To create a navigational link, select the Link option from the menu bar, then enter the URL and display text. You can also enter text on-screen, then highlight the text and select the hyperlink button. In order to jump to a slide in your presentation with a link, enter the URL for the slide number to jump to as #N. For example, to jump to slide 3, enter #3. To return the user to the previous slide viewed, enter #b (back). In the example on the left, a link will display as "CLICK HERE" which will navigate the user to slide 3.

19.1.14 Hotspots

To create a navigational hotspot, start by adding an image to your slide. Once your image is added, save your presentation, then press and hold the CTRL key while clicking on the image. This will open the image editing menu. To add a hotspot, click "Add Hotspot", then adjust the size of your hotspot by clicking and holding the lower-right corner of the hotspot box.

In the lower menu, input the link URL for the slide you intend to navigate to upon clicking the hotspot and click "Update". In the example on the right, upon clicking the hotspot, the user will be navigated to slide #2. Note that an image can contain multiple hotspots. You can accomplish this by selecting "Add Hotspot". This allows users to create alternate paths or branched scenarios.



19.1.15 Image Cropping

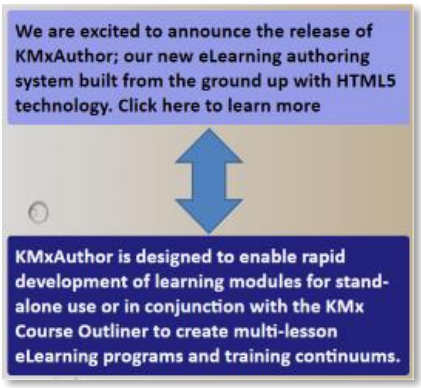
Similarly to adding hotspots, you can crop images, including the ability to crop with various pre-formatted shapes. Start by adding an image to your presentation, save, then CTRL-click the image. The upper menu contains various shapes you can apply to your image (reference above image). You may also choose to manually crop your image by clicking "Show Crop Tool" in the lower menu. Scale the size of your crop by clicking and holding in the lower-right corner. Once you are satisfied with the result, select "Crop Picture". After completing your image adjustments, select "Done".

19.1.16 Image Animations

If you'd like to apply an animation to an image, select your animation from the "Set Animation" dropdown (see image above). Input a value for "Duration" to specify the animation length and add a value for "Delay" if the animation should trigger after a specified number of seconds.

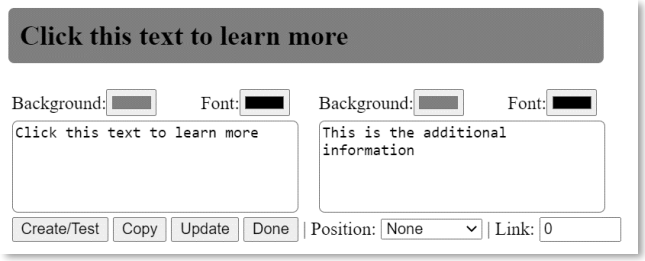
19.1.17 Simple Interaction

KMxAuthor Interactions enable the lesson developer to use simple forms to create dynamic elements. These elements can provide users with additional information, test their comprehension of materials delivered and provide updates on their status and score. The interactions are designed for ease of use by both the author and the student/user. They will display and function on any contemporary browser, tablet, or mobile device. Interactions can be scored or unscored. Interactions can be copied from one slide to another for reuse of color schemes, consistency in phrasing and ease of maintenance.



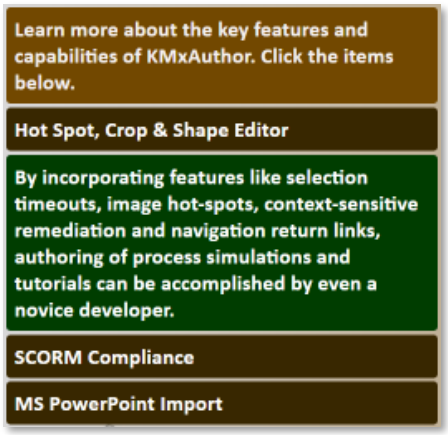
This is a simple clickable interaction. It has two modes of operation: 1) If the "Link" entry is set to "0" (default), each click toggles the message and colors. 2) If the "Link" entry is set to greater than "0", the initial click will toggle the message and color to the additional information message, and a subsequent click (on the additional information message) will navigate the user to the slide # for the link entry. When using a link, provide text in the additional information message to instruct the user to click the link. Different versions can be used multiple times on a single slide. Simple interactions are not scored. The messages are delivered in the order presented on the screen.

To create an interaction, complete the entries on the right. Use the "Create/Test" button to preview your interaction. Use the "Copy" button to copy the currently displayed interaction to the clipboard. Place the cursor where you would like the interaction to appear and use Right-click, Paste (ctrl v) to insert the interaction into your lesson.



To edit the interaction, click on it. Use the “Update” button to save your changes to the lesson. Use the “Done” button to exit the Interaction editor. When used in conjunction with images or video, consider placing the image and the interaction into table cells to ensure proper alignment on any device.

19.1.18 Multiple Selection Interaction



This interaction will allow for questions and "learn more" interactivities with 2, 3 or 4 possible answers (Number of Answers). The answers may also be used as statements for further discovery (i.e. click to learn more). This interaction has Scored and Not Scored modes of operation, discussed below.

For both modes, when the user clicks on an answer, the interaction will reveal the interaction response for that answer. If a "Correct Answer" (1-4) is entered, the interaction will display the "Correct Response" color scheme for the response associated with the correct answer. All other answers when clicked will display the "Incorrect Response" color scheme. If no Correct Response is entered (an entry of 0), the "Correct Response" color scheme is used for all answers. The modes of operation are as follows:

Scored Mode - When the "Use Slide Score" option is enabled (green), the interaction will suspend the application of points (Score +/-) assigned to the slide where the interaction is displayed. The interaction will also suspend the "Next" navigation button, if enabled.

For questions with a "Correct Answer" (1-4), any answer selection by the user will re-enable the Next button. If the user selects the Correct Answer, the points assigned to the slide will be awarded. The user has only 1 attempt to answer the question. Selection of additional answers is suspended.

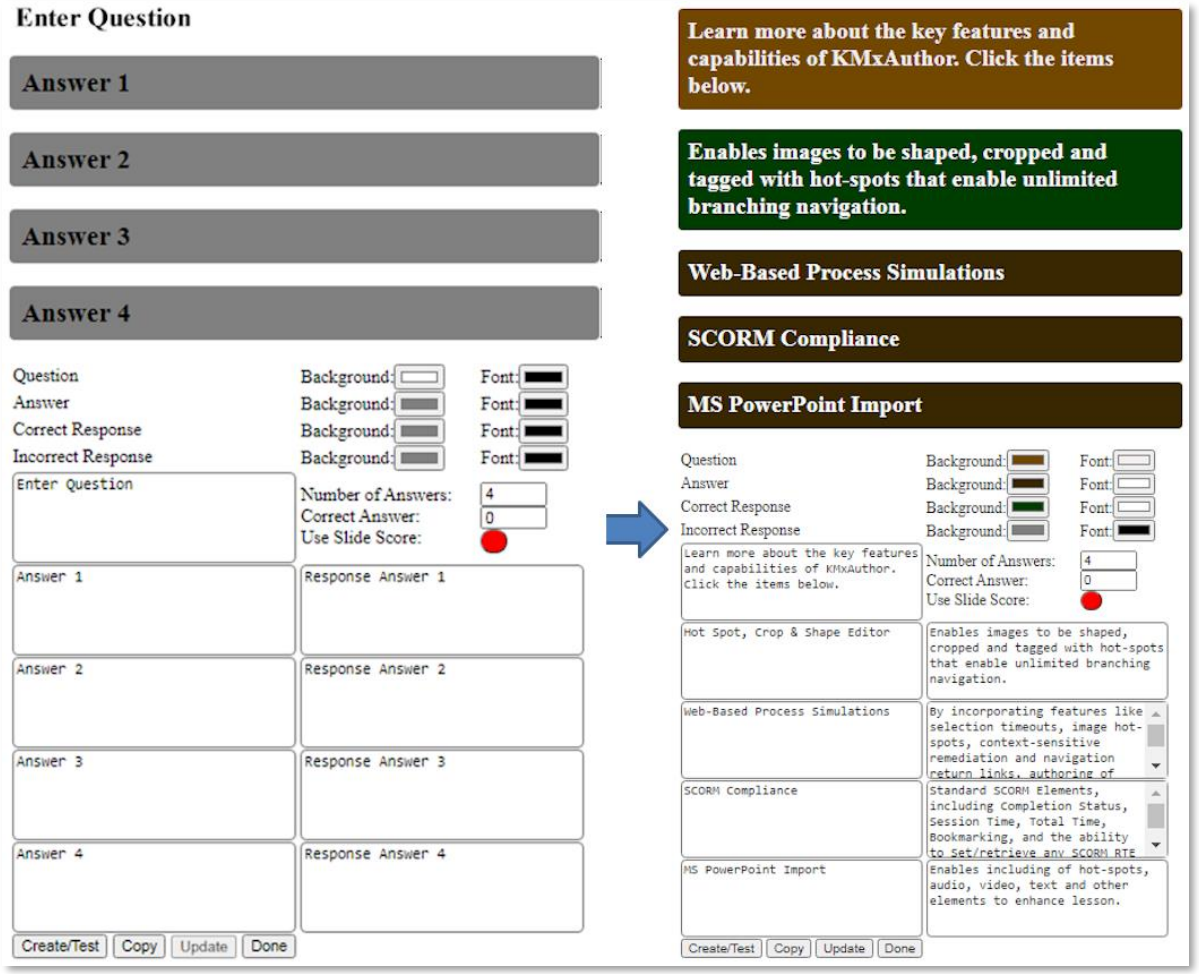
For questions with no "Correct Answer" (an entry of 0), the user is required to select all answers to reveal the responses in order to proceed. Once all answers are reviewed, the interaction will award the points assigned to the slide and re-enable the next button.

In "Scored" mode, once an answer is selected to reveal the response, it cannot be toggled back to the original answer text.

Not Scored Mode - When the "Use Slide Score" option is disabled (red), the interaction will allow the user to explore each possible answer. The "Next" navigation button is not disabled, and the slide score is not suspended. The user can also toggle the answer back to the initial text.

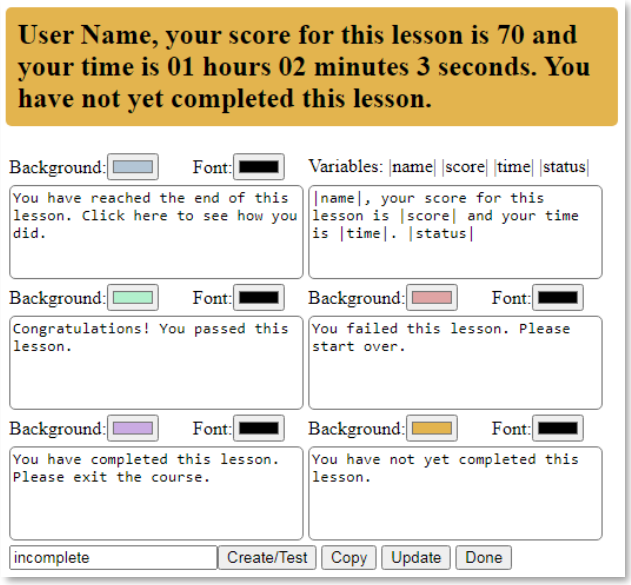
To create a multiple selection interaction, complete the entries below. Use the “Create/Test” button to preview your interaction. Use the “Copy” button to copy the currently displayed interaction to the

clipboard. Place the cursor where you would like the interaction to appear and use Right-click, Paste (ctrl v) to insert the interaction into your lesson. To edit the interaction, click on it. Use the "Update" button to save your changes to the lesson. Use the "Done" button to exit the Interaction editor. When used in conjunction with images or video, consider placing the image and the interaction into table cells to ensure proper alignment on any device.



19.1.19 Lesson Status Interaction

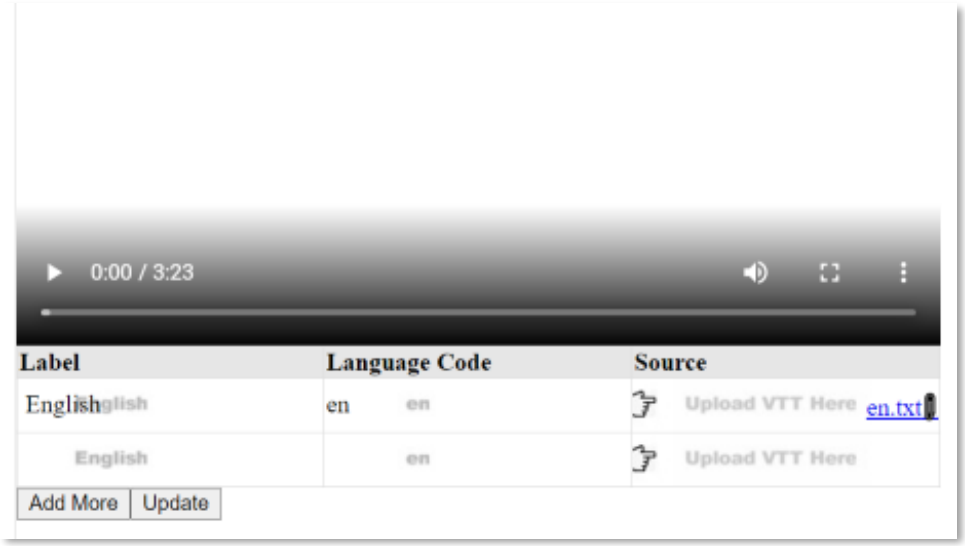
This interaction provides a mechanism to display status, score, and time information for the user. The interaction uses the LMS SCORM data variables if available. The messages are delivered in the order presented on the screen. When clicked, the interaction retrieves the latest information for the user.



Because the elements may update based on time elapsed and user action, the interaction enables the user to update the display with a subsequent click. To create an interaction, complete the entries to the above. Use the "Create/Test" button to preview your interaction. Enter any of the SCORM lesson status phrases (incomplete, completed, passed or failed) to see how the interaction will display for users for each condition. Use the "Copy" button to copy the currently displayed interaction to the clipboard. Place the cursor where you would like the interaction to appear and use Right-click, Paste (ctrl v) to insert the interaction into your lesson. To edit the interaction, click on it. Use the "Update" button to save your changes to the lesson. Use the "Done" button to exit the Interaction editor. When used in conjunction with images or video, consider placing the image and the interaction into table cells to ensure proper alignment on any device.

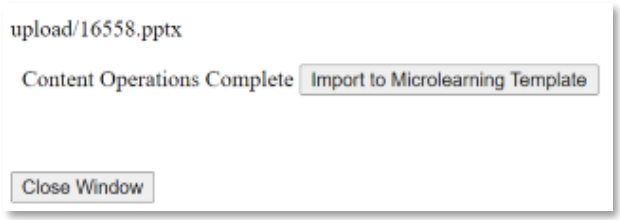
19.1.20 Subtitles/Captions (WebVTT)

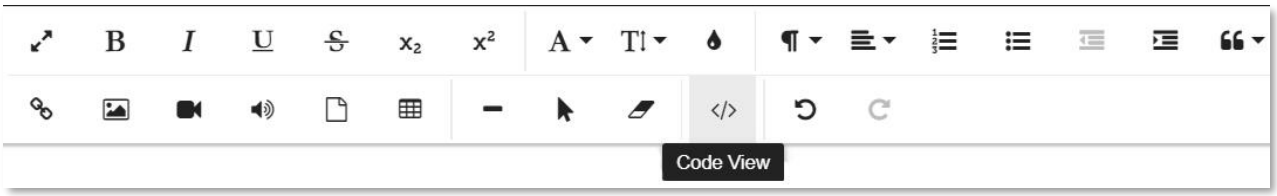
WebVTT is a standard format for displaying timed text tracks, such as subtitles or captions, to HTML5 elements. KMxAuthor allows users to add WebVTT entries to videos. Start by adding a video to your template, save, then hold the CTRL key while double-clicking the video. A new table will load below the video to make your WebVTT entries. Add the language label (used by the video tag if multiple languages are available), add a language code (i.e. en, fr, sp, etc.) and then in the field labeled "Source" use the insert document option to upload your VTT as a txt file. You can add unlimited language tracks with the "Add More" button. When completed, press the "Update" button to process your entries or subsequent changes.



19.1.21 PowerPoint Import

Each slide can be independently created in KMxAuthor or you can import a PowerPoint slide deck. Note that animations are not supported; rather, the import tool converts each slide into an image. Start by creating a new content record with content type "MS PowerPoint". Title your content record and refresh the page, then select "Edit Content" to upload your slide deck. Once the upload has completed processing, you'll have an option to "Import to Microlearning Template." Select this option, and KMx will generate a new content record for the microlearning titled "Content Title – Imported". You can now add hotspots, add/remove slides, etc.



19.1.22 Code View

Advanced users may opt to leverage "Code View" from the menu bar while using KMxAuthor. Note that the feature is available; however, we suggest creating content using standard view.