articulate®

ARTICULATE KNOWLEDGE PORTAL 4.2

DOCUMENTATION

Table Of Contents

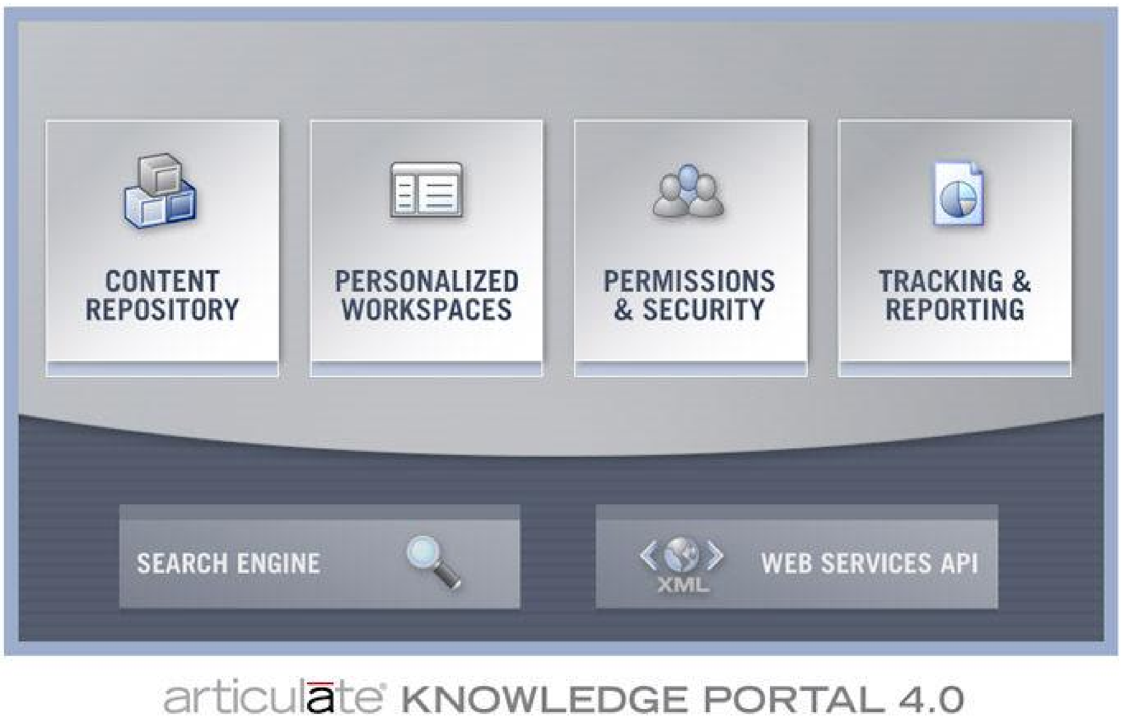
Welcome to Articulate Knowledge Portal Documentation

This documentation is intended for Articulate Knowledge Portal administrators and is to be used in conjunction with the Articulate Presenter Documentation.

Rapid e-learning is great, but how do you get your knowledge to the right users in the right way, and how do you know they are learning?

Articulate Knowledge Portal provides the solution. Now, anyone can quickly and easily manage and deliver knowledge in a highly personalized way.

Knowledge Portal provides everything organizations need to organize, manage and deliver your Articulate presentations and support materials, track who is viewing them and see how well they learn.



Knowledge Portal uses form-based tools (no programming required!), giving non-technical professionals a complete, easy-to-build and easy-to-manage platform for e-learning and communications across the enterprise.

Content Repository
Store, manage, share and secure all of your Articulate Presentations, QuizMaker quizzes and supporting content. Manage virtually any content type, including Articulate content, Word documents, Excel spreadsheets, PDF files, Flash movies and more.

Personalized Workspaces
Present your content in an easy-to-navigate knowledge portal. Map content to job roles so that viewers see only the information that is relevant to them. Develop custom portal sites in minutes with "Portal Objects," sharable building blocks you create by filling in a simple form.

Permissions and Security
Manage your users, groups and content with easy-to-set security controls and access rights. Select from common permission levels, or customize your own policies.

Tracking and Reporting
Track your users' progress through extensive real-time reports. Measure knowledge and completion status with quiz and activity results. Reports are accessible online or can be downloaded and viewed in Excel.

Search Engine
Allow your users to instantly find the content they're looking for. Search results include links to relevant slides, so users can directly access relevant content.

Web Services API
Connect Articulate Knowledge Portal to your existing systems though an extensible architecture. XML Web Services allows easy, open integration possibilities. Typical applications include:
•Human Resource Management systems
•Corporate directories and single sign-on
•E-Commerce systems
•3rd-party registration systems

This documentation covers Articulate Knowledge Portal Version 4.2. This documentation was last updated July 2005.

Using the Content Repository

Content Repository Overview

The Content Repository is the centralized content store of Articulate Knowledge Portal. It allows you to store, manage, share and secure all of your content.

Generally, there are categories of content you will manage in the content repository.

Content Category	Description
Articulate Presenter Presentations	Converted PowerPoint to Flash interactive courses and presentations. This is the most common type of content in the repository.
Source Assets	Items such as source PowerPoint presentations, sound files, and embedded flash movies that are used during the authoring process.
Reference Materials	Items such as Word, Excel, PDF and files used to support the end-user learning experience.

Repository File Types

The Content Repository can manage almost any file type. The following is a list of supported file types:

Articulate Proprietary:

- Articulate Presenter v5 Presentation
- Articulate Presenter v4 Presentation
- Articulate Presentation (legacy format)

Desktop Productivity:

- Word Document
- PowerPoint Presentation
- Excel Spreadsheet
- PDF Document

Multimedia:

- Flash Movie
- Windows Audio
- MPEG Audio
- MP3 Audio
- MPEG Video
- QuickTime Video
- Windows Media Video

Image:

- JPEG Image
- GIF Image
- TIFF Image
- PNG Image
- BMP Image

Archive:

- Zip Compressed Archive
- Stuff-it Compressed Archive
- GZIP Compressed File

Other:

- HTML Document
- Rich Text Document
- Text Document

- Generic Content Type (used for content types that are not on the above list)

Working with the Repository

Content Repository Interface

The Content Repository is composed of three main elements:

1. **The Repository Tree** - Stores all your content.
2. **The Repository Tasks Panel** - Provides you with tasks you can perform on your repository folders and files.
3. **The Info Panel** - Displays information and metadata about the selected object.

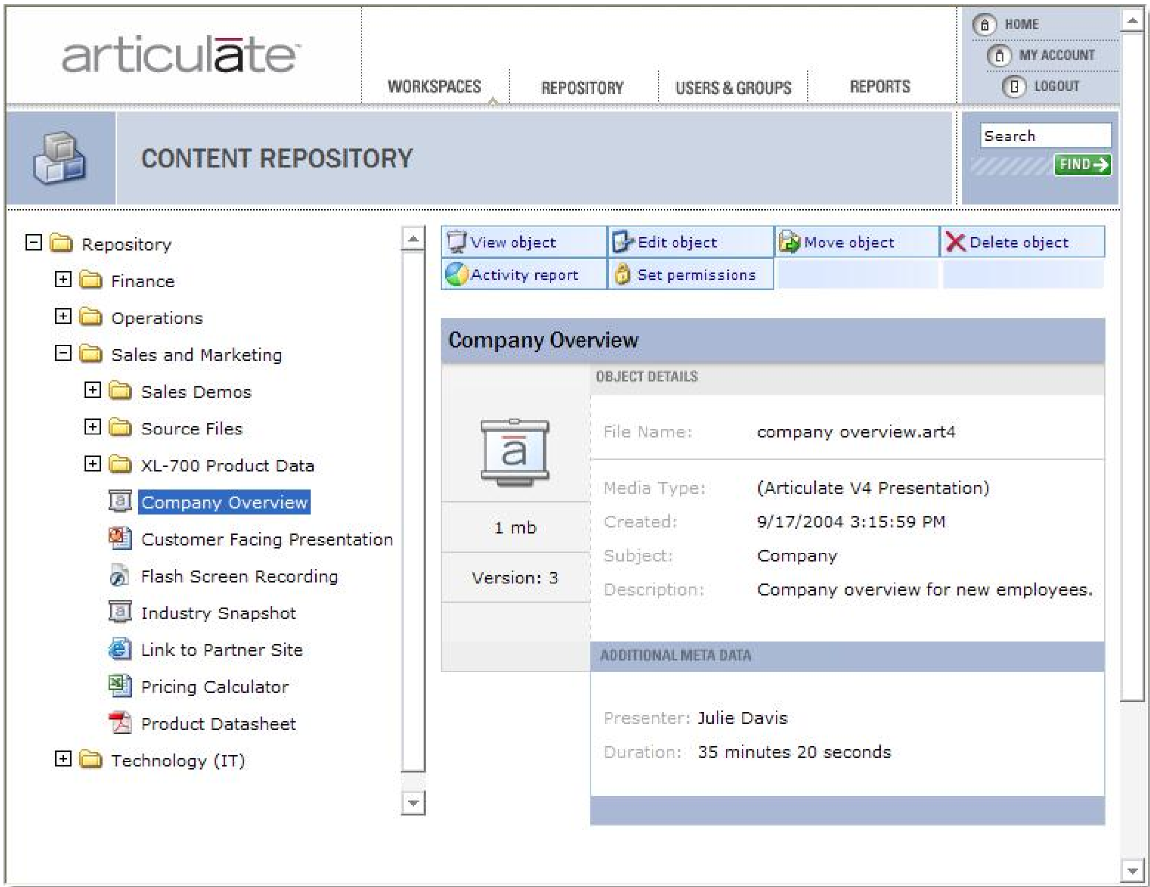


Image 1: The Content Repository, showing the Repository Tree, Tasks Panel, and Info Panel.

The Repository Tree

Working with the Repository Tree is a lot like working with the file tree in a standard computer file system such as Windows Explorer. As in Windows Explorer, the repository tree is located on the left-hand side of the screen. In the Repository Tree, files are organized into folders, and you can organize your files and folders into any structure that suits your needs.

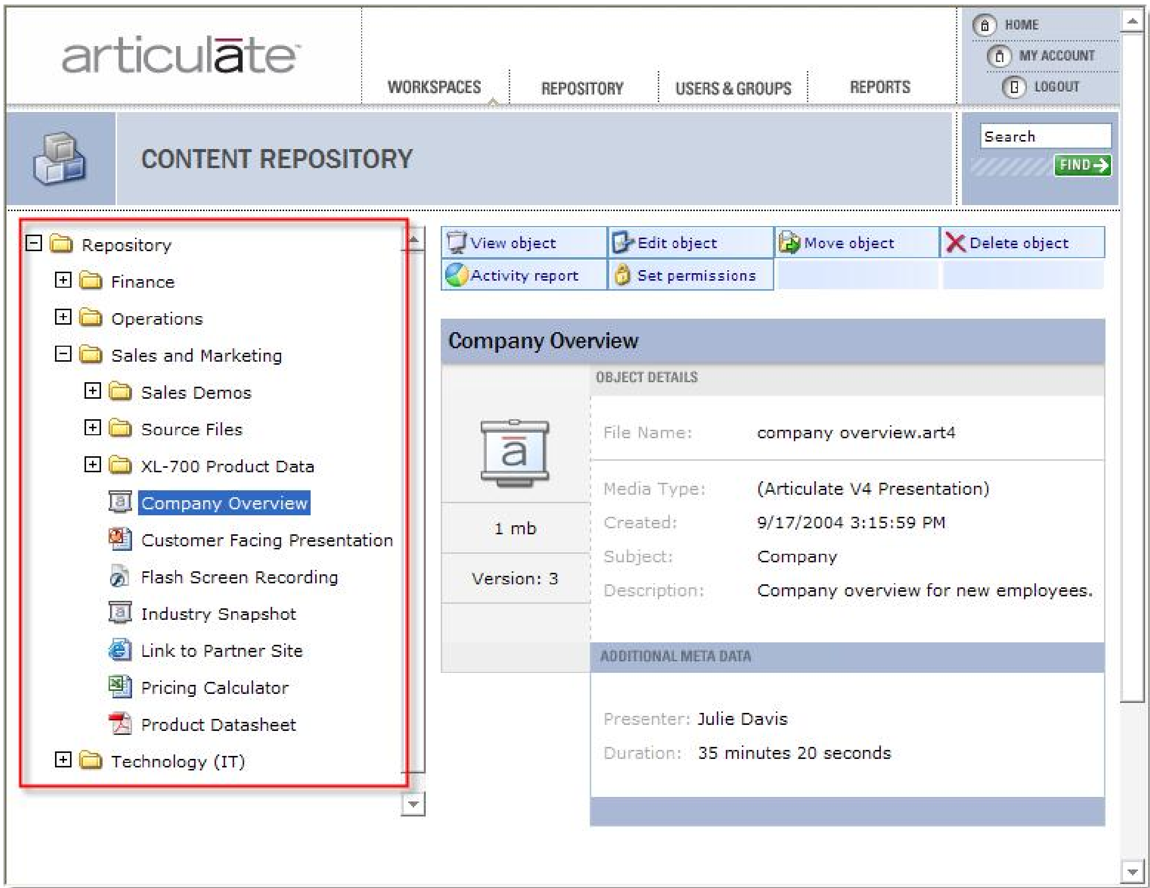


Image 2: The Repository Tree.

Tip: The first time you open the repository, you will see only one folder. This folder is the top-level or "root" folder. You can add files directly into this folder, but a best practice is to create sub-folders in the root folder to organize your contents.

The Repository Tasks Panel

The Repository Tasks Panel will display different tasks depending on whether you select a folder or a file.

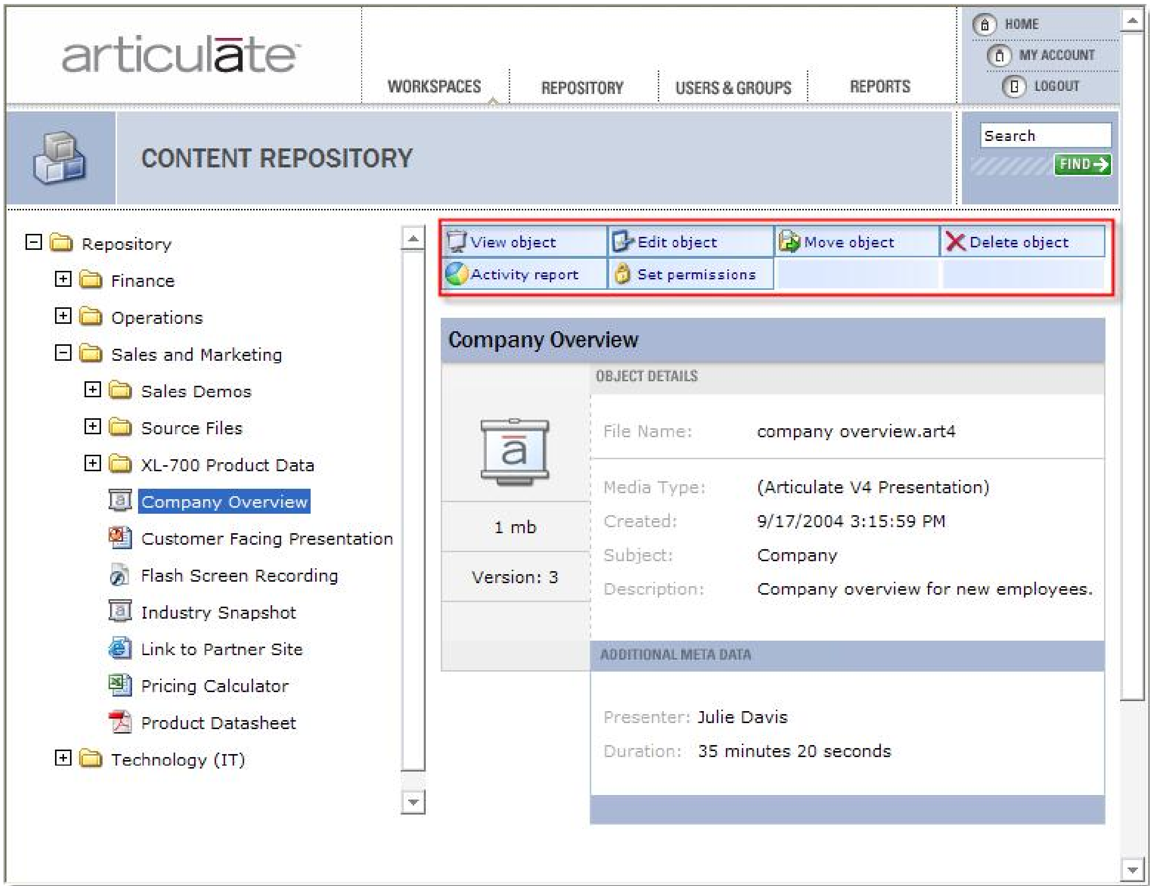


Image 3: The Repository Tasks Panel.

Folder Tasks: (When a folder is selected.)

- **New folder** - creates a new folder below the selected folder.
- **Rename folder** - renames the selected folder.
- **Move folder** - moves selected folder into another folder.
- **Delete folder** - deletes the selected folder.
- **Add Object** - uploads a file into the selected folder.
- **Set permissions** - sets permission on the selected folder.

Object Tasks: (When an object [i.e., file, presentation, etc.,] is selected)

- **View object** - views the current object.

- **Edit object** - edits the object metadata or updates the object with a new version.
- **Move object** - moves selected object into another folder.
- **Delete object** - deletes the selected object.
- **Activity report** - provides a usage report on the selected object.
- **Set permissions** - sets permission on the selected object.

Note: You may not see all the folder or file tasks listed here. This is because you have not been granted certain repository permissions.

The Repository Details Panel

The **Repository Details Panel** provides you with information and metadata about the selected object. Below is a sample Details Panel.

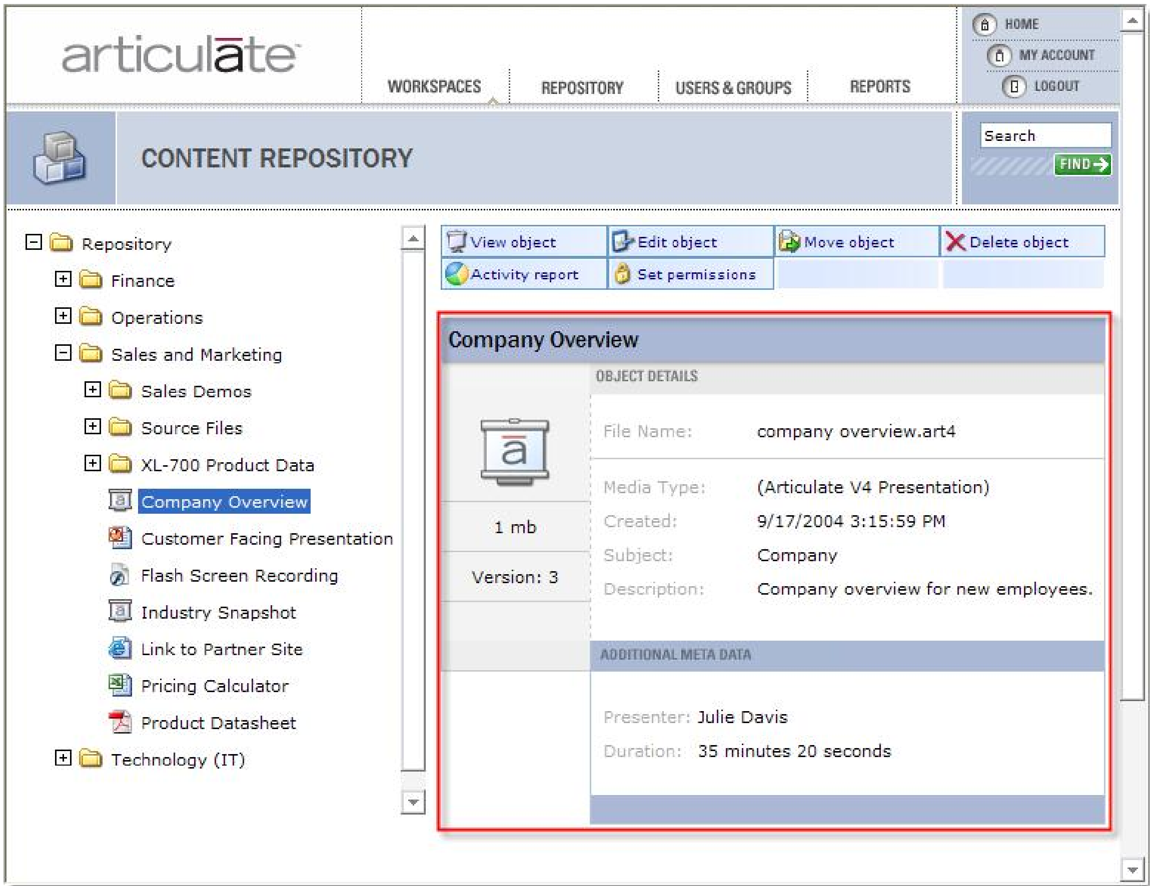


Image 4: The Repository Details Panel showing the details of an Articulate V4 Presentation.

Repository Permissions

Understanding Repository Permissions

Access to objects in the Content Repository are based on permissions granted to the user. A user's ability to view, edit, manage or delete repository objects is based on the permissions set for that user for a specific object.

There are three standard roles you can assign to a user account for a repository object. Each role has permissions associated with it.

	Roles		
Permissions	Owner	Author	Viewer
Set Permissions	✓		
Create Objects	✓	✓	
Modify Objects	✓	✓	
Delete Objects	✓	✓	
View Objects	✓	✓	✓

In addition to **Owner**, **Author**, and **Viewer** roles, you have two other options:

Custom - Allows you to select the exact permissions desired. (For example, you might want to allow a user to have Create, Modify and View permissions, but not Delete permissions.

None - Allows you to clear any selected permissions.

Note: By default, Administrators have Owner permissions for all repository objects.

See Users & Groups for more information on managing accounts.

Setting Repository Permissions

By default, the following groups will exist in your Articulate Knowledge Portal:

- Authors
- All Users

Note: It is recommended that you **leave Repository permissions at their default settings** unless you have a specific reason for modifying them.

You should add to the Authors group any users who should be able to add content to your Repository.

Permissions can be set at the folder or file level. This way, you can grant a user permissions to certain objects, while restricting the user to other objects. For example, you may grant the 'Sales Rep' group permission to view contents of the 'Sales' folder, while restricting the same group from viewing the 'Finance' folder.

Tip: It's a best practice to set permissions at the folder level, rather than at the file level. Setting permissions at the folder level makes it easier to manage your repository permissions.

To set Repository Permissions:

1. Select the **File** or **Folder** for which you want to apply permissions.
2. Click **Set Permissions**.
3. The **Permissions Window** will display.
4. Click the **Add** button to add a user or group account to the window. (Or select an existing account that is already displayed in the window.) Select a user or group. It will be added to the Permissions Window.
5. Select a **Role** from the drop-down list, or manually select permissions by checking the radio buttons.
6. Click **Apply**.
7. Click **OK**.

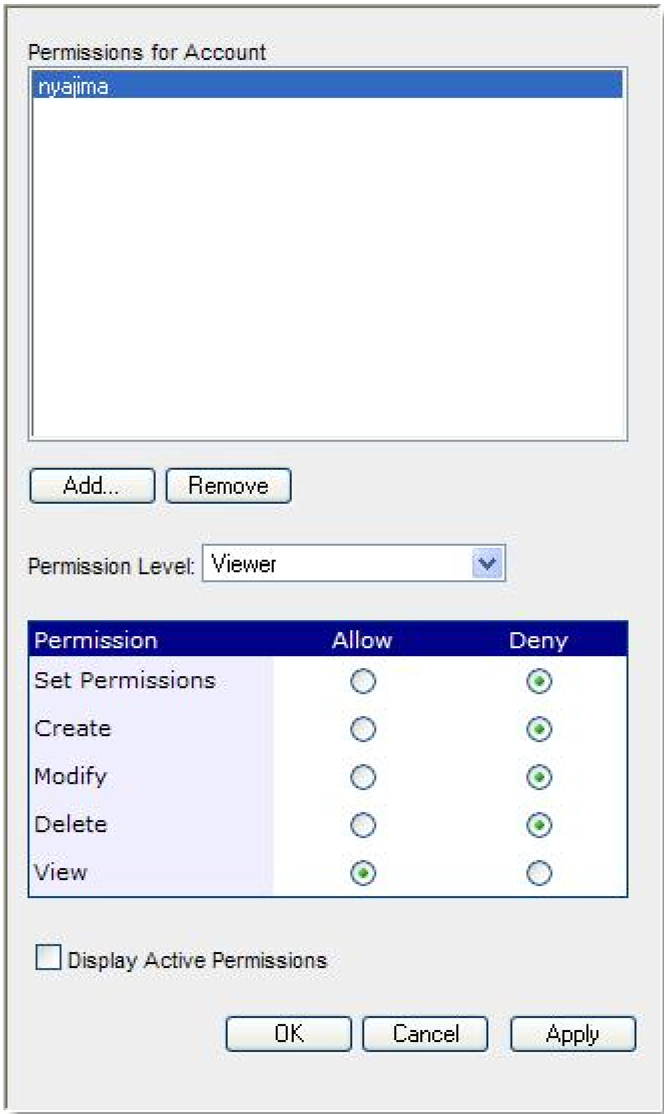


Image 5: Setting Repository permissions for a user to Permission Level "Viewer."

You can also remove permissions from a user account by selecting the user account and clicking the **Remove** button. This will clear any special permissions assigned to the user account for that object. If a user account is not in the Permissions Window, it will automatically inherit permissions from the parent folder.

Note: The Content Repository will automatically inherit permissions for a user account from the parent folder. If you wish to change the user permissions for a sub-folder or file, you should set permissions for the specific sub-folder or file. Folders below this sub-folder will now inherit the new permissions.

Using Workspaces

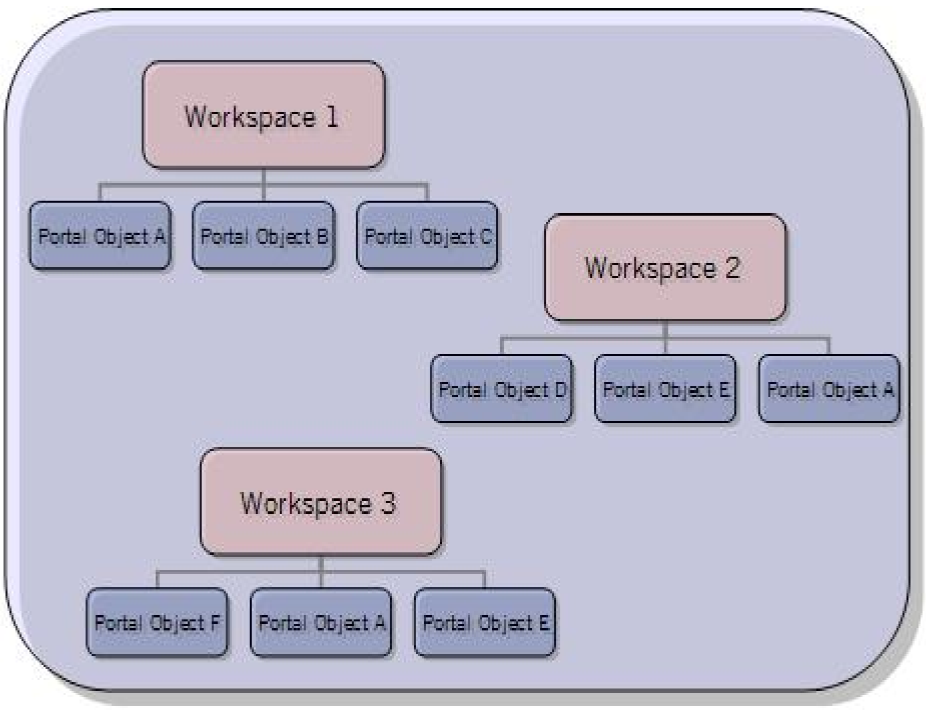
Workspaces Overview

Workspaces provide your users with a common destination for viewing all of your e-learning courses, rich-media presentations and associated content. Workspaces can be highly customized by the author, and are incredibly easy to use.

Workspaces organize content around specific user groups. For example, you may create a Workspace for your sales force, while having a separate Workspace for your finance team. In this way, you can present content that is most relevant to the specific user group. Workspaces are also useful when created for a specific project or event involving multiple user groups.

Workspaces are composed of **Portal Objects**. Portal Objects are containers for different types of items you place on your Workspace.

See Adding Portal Objects for types of Portal Objects you can add to your Workspace.



Workspaces

Creating a Workspace

In order to create a Workspace, you must first be a member of the Administrators group. Only Administrators are able to create Workspaces. Once a Workspace is created, an Administrator can permit any user to view, edit, or manage a Workspace.

To create a workspace:

1. Click **Workspaces** from the toolbar.
2. Select **New Workspace**.
3. Enter a **Title** for the Workspace.
4. Enter a **Description** for the Workspace.
5. Click **Save**.

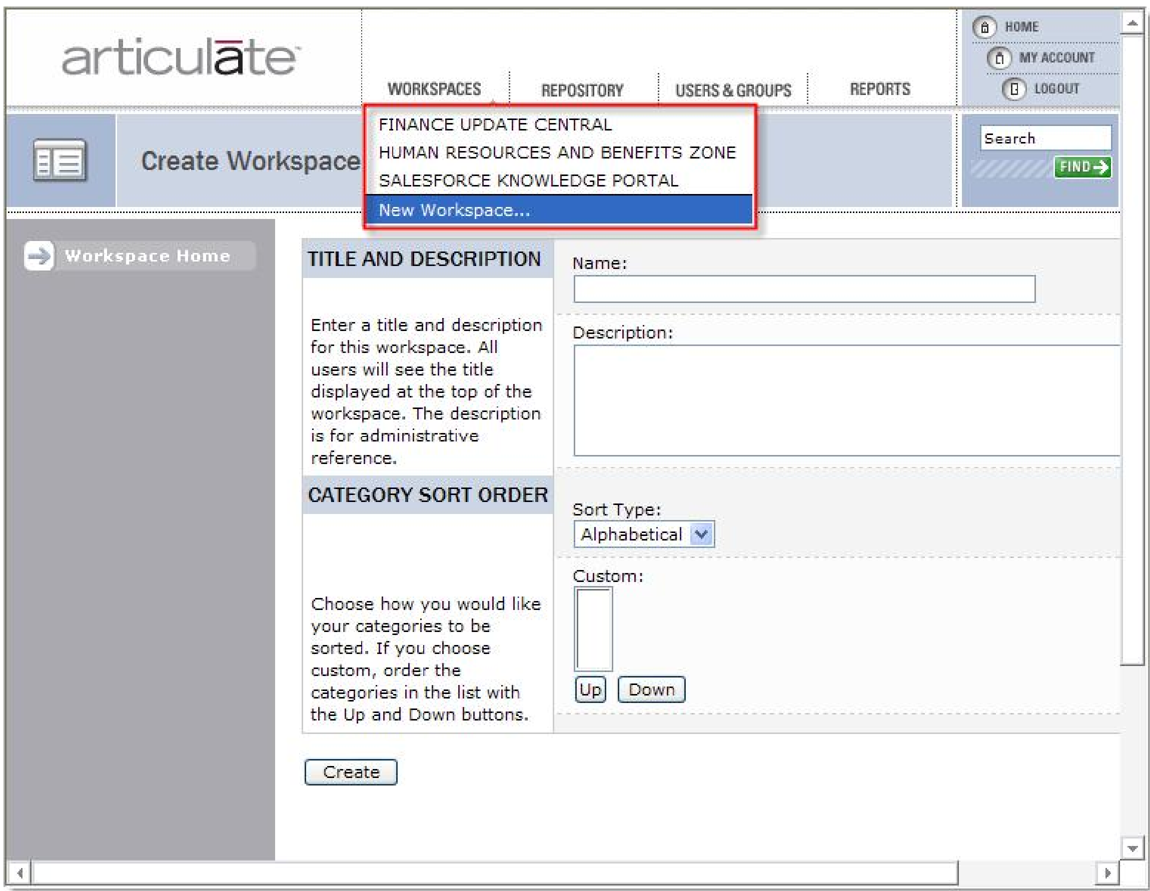


Image 6: Creating a new workspace. The new workspace details screen is also shown.

Note: Users of the workspace will see the title at the top of the Workspace.

Setting Workspace Permissions

Access to Workspaces are based on permissions granted to the user. A user's ability to view, edit, manage or delete a Workspace is based on the permissions set for that user for a specific Workspace.

There are three standard roles you can assign to a user account for a Workspace. Each role has permissions associated with it.

	Roles		
Permissions	Owner	Author	Viewer
Set Permissions - Set permissions for the workspace.	✓		
Create - Add Portal Objects.	✓	✓	
Modify - Modify workspace properties.	✓	✓	
Delete - Delete the workspace.	✓	✓	
View - View the workspace	✓	✓	✓

In addition to **Owner**, **Author**, and **Viewer** roles, you have two other options:

> **Custom** - Allows you to select the exact permissions desired. (For example, you might want to allow a user to have Create, Modify and View permissions, but not Delete permissions.
>
> **None** - Allows you to clear any selected permissions.

To set Workspace Permissions:

1. Click **Edit this Workspace**.
2. Select **Workspace Permissions**.
3. The **Permissions Window** will display.
4. Click the **Add** button to add a user or group account to the window. (Or select an existing account that is already displayed in the window.) Select a user or group. It will be added to the Permissions Window.
5. Select a **Role** from the drop-down list. Or manually select permissions by checking the radio buttons. If you manually select permissions, be sure to check all five radio buttons.
6. Click **Apply**.
7. Click **OK**.

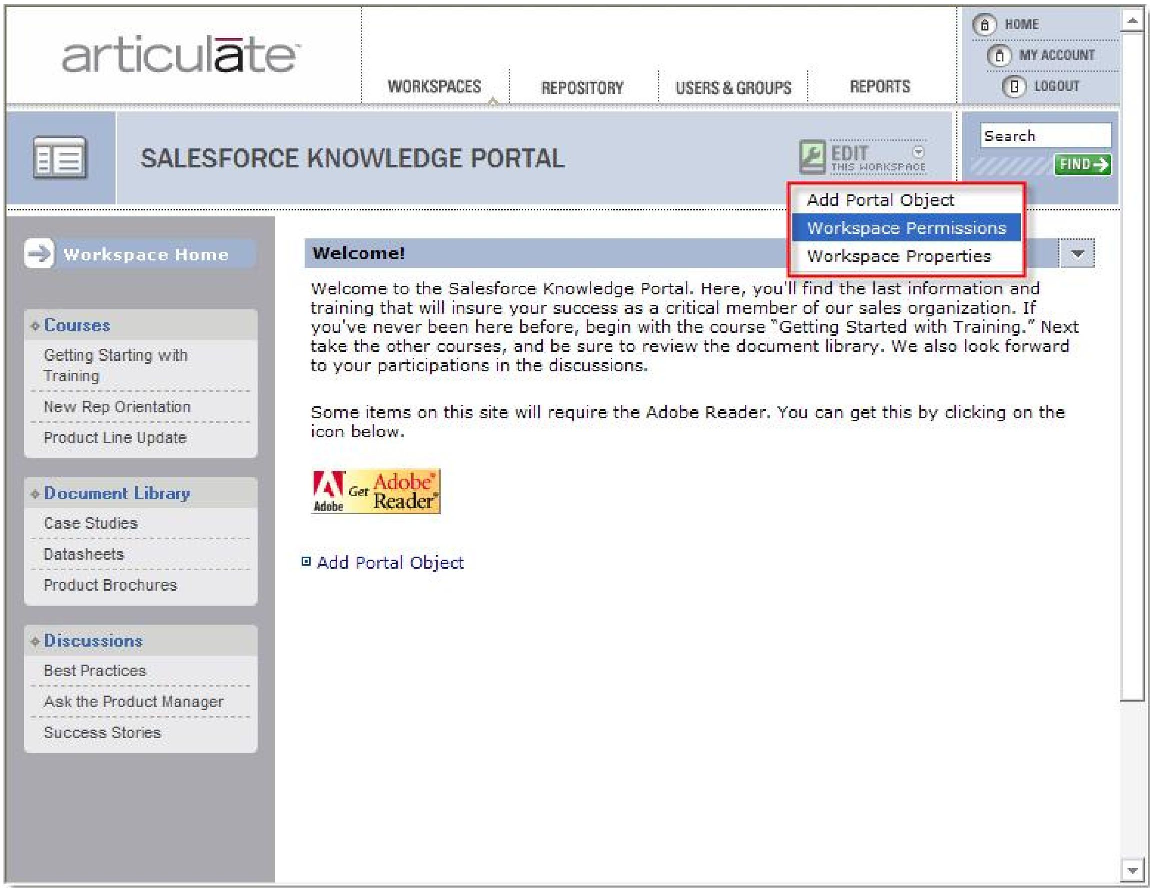


Image 7: Accessing Workspace Permissions for the Salesforce Knowledge Portal. The portal's home page is shown.

You can also remove permissions from a user account by selecting the user account and clicking the **Remove** button. This will clear any permissions assigned to the user account for that Workspace.

Workspace Properties

Each Workspace has a set of associated properties where you can manage the Workspace **Name**, **Description**, and **Category Sort Order** preferences.

To set Workspace Properties:

1. Click **Edit this Workspace**.
2. Select **Workspace Properties**.
3. The **Properties** for the selected Workspace will display.
4. If desired, edit the text for the Workspace's **Name** and **Description**.
5. If desired, select the default sort order for the Workspace: **Alphabetical** or **Custom**.
6. If you select a **Custom** sort order, highlight the category you would like to arrange, then click the **Up** or **Down** button to move it to wherever you would like it to appear relative to your other categories. Repeat for each category you would like to move.
7. If desired, specify a custom **stylesheet** for this workspace. Learn more in Customizing Workspaces.

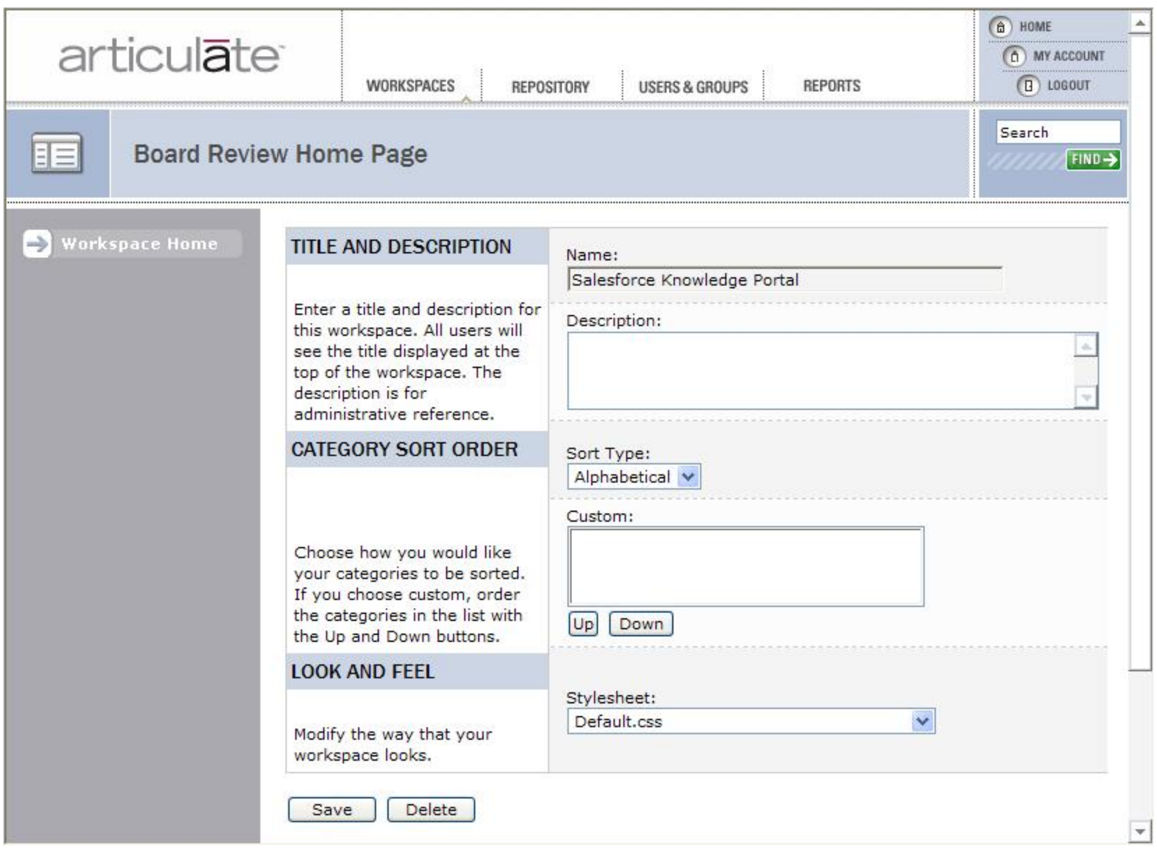


Image 8: The Workspace Properties screen showing a custom category sort order.

Customizing Workspaces

You can customize nearly all stylesheet elements, logos, images, and text that a viewer will see in Workspaces. You can create unique designs for each Workspace.

Note: Creating customized stylesheets and images is recommended only for **advanced Web developers or designers**. If you're unsure of how to find your site's stylesheet or are unfamiliar with CSS, then Articulate recommends finding a developer or designer who is.

To customize Workspace stylesheets and images:

1. Download a copy of your site's stylesheet (**/ClientData/Default.css**).
2. Make desired edits to the stylesheet and image references.
3. Save your new new stylesheet (<Anything>.css) and upload using the form here: **/Portal/config/siteconfig.aspx**.
4. If you have new images, upload each .GIF file or .ZIP package using the same form as above (you must upload CSS and GIF files separately).
5. When editing an existing or creating a new Workspace, select from the **Look and Feel** drop-down menu the desired stylesheet.

To customize Workspace text labels:

1. Download the file **config.zip**.
2. Extract the contents of the zip file.
3. Open **config.xml** using NotePad or another text editor.
4. Edit the text labels you would like to modify (see below for the text included in the file).
5. Save **config.xml** and upload here (http://**<yoursite>**.articulateglobal.com/Portal/config/siteconfig.aspx) after logging in to your account.

The following are the elements of the Workspace with editable text:

<articulate.configuration>

<homeText>Home</homeText>

<workspaceHomeText>Workspace Home</workspaceHomeText>

<searchResultsStausText>Search Results</searchResultsStausText>

<searchBoxText>Search</searchBoxText>

<searchResultsHeaderText>Search Results</searchResultsHeaderText>

<courseOutOfOrderText>Course activities must be taken in sequence.</courseOutOfOrderText>

<courseActivitiesText>Course Activities</courseActivitiesText>

<documentsAndLinksText>Documents and Links</documentsAndLinksText>

<viewedStatusText>Viewed</viewedStatusText>

<notViewedStatusText>Not Viewed</notViewedStatusText>

<attemptedStatusText>Attempted</attemptedStatusText>

<notAttemptedStatusText>Not Attempted</notAttemptedStatusText>

<passedStatusText>Passed</passedStatusText>

<failedStatusText>Failed</failedStatusText>

<incompleteStatusText>Incomplete</incompleteStatusText>

<completeStatusText>Complete</completeStatusText>

<homeChooseWorkspaceLabelText>Choose a Workspace</homeChooseWorkspaceLabelText>

<homeChooseWorkspaceDescriptionText>Choose a workspace to view. You can always select a different workspace later from the Workspaces menu.</homeChooseWorkspaceDescriptionText>

<homeMakeDefaultLabelText>Make Default</homeMakeDefaultLabelText>

<homeMakeDefaultDescriptionText>Make this my default workspace. Next time I login, I will go directly to the workspace.</homeMakeDefaultDescriptionText>

<homeMakeDefaultCheckBoxText>Make this my default workspace.</homeMakeDefaultCheckBoxText>

<homeEnterButtonText>Enter >></homeEnterButtonText>

<courseTitleText>Course Title</courseTitleText>

<expectedDurationText>Expected Duration</expectedDurationText>

<targetAudienceText>Target Audience</targetAudienceText>

<prerequisitesText>Prerequisites</prerequisitesText>

<presenterText>Presenter</presenterText>

<durationText>Duration</durationText>

<minutesText>Minutes</minutesText>

<secondsText>Seconds</secondsText>

<commentWebPartReplyText>1</commentWebPartReplyText>

<commentWebPartAddCommentText>Add Your Comments</commentWebPartAddCommentText>

<titleText>Title</titleText>

<commentWebPartCommentsText>Comments</commentWebPartCommentsText>

<commentWebPartPostText>Post</commentWebPartPostText>

<commentWebPartPostedByText>Posted by:</commentWebPartPostedByText>

<commentWebPartRequiredText>Title and comments fields are required.</commentWebPartRequiredText>

<myAccountViewHistoryLabelText>View History</myAccountViewHistoryLabelText>

```
<myAccountViewHistoryDescriptionText>View a history of your activity.</myAccountViewHistoryDescriptionText>

<myAccountViewHistoryButtonText>View History</myAccountViewHistoryButtonText>

<myAccountDefaultWorkspaceLabelText>Default Workspace</myAccountDefaultWorkspaceLabelText>

<myAccountDefaultWorkspaceDescriptionText>Select a default workspace.</myAccountDefaultWorkspaceDescriptionText>

<myAccountChangePasswordLabelText>Change Password</myAccountChangePasswordLabelText>

<myAccountChangePasswordDescriptionText>Enter a new password to change it.</myAccountChangePasswordDescriptionText>

<passwordText>Password</passwordText>

<confirmText>Confirm</confirmText>

<myAccountSaveText>Save Changes</myAccountSaveText>

<myAccountSaveConfirmation>Your changes have been saved.</myAccountSaveConfirmation>


<popupDetectedTitle>Pop-Up Blocker Detected</popupDetectedTitle>

<popupDetectedDescription>The presentation was blocked due to a pop-up blocker on your computer. Add this website to your pop-up blocker safe list and then try again.</popupDetectedDescription>

<popupDetectedCancel>OK</popupDetectedCancel>


<printCertificateText>View Certificate</printCertificateText>

<myAccountCertificatesLabelText>VIEW CERTIFICATES</myAccountCertificatesLabelText>

<myAccountCertificatesDescriptionText>View a list of completed courses and view certificates.</myAccountCertificatesDescriptionText>

<myAccountViewCertificatesText>View Certificates</myAccountViewCertificatesText>


<accountExpiresOnText>Your account expires on {0}.</accountExpiresOnText>

<accountExpiredText>Your account has expired. Please contact your administrator.</accountExpiredText>


<resumeExpiration>30</resumeExpiration>


</articulate.configuration>
```

Note: The **<resumeExpiration>** tag is the number of days an Articulate Presenter course should auto-resume. For example, if set to 30, a presentation will resume on the last slide viewed for the next 30 days. On the 31st day, viewing will start at slide 1. If no resume is wanted (i.e., start at slide 1 every time), set to 0.

Deleting a Workspace

It is important to be very cautious about deleting a Workspace as it will also delete all Portal Objects in the Workspace. (However, no objects from the repository will ever be affected.)

To delete a workspace:

1. Click **Edit this Workspace** as shown above.
2. Select **Workspace Properties.**
3. Click **Delete.**

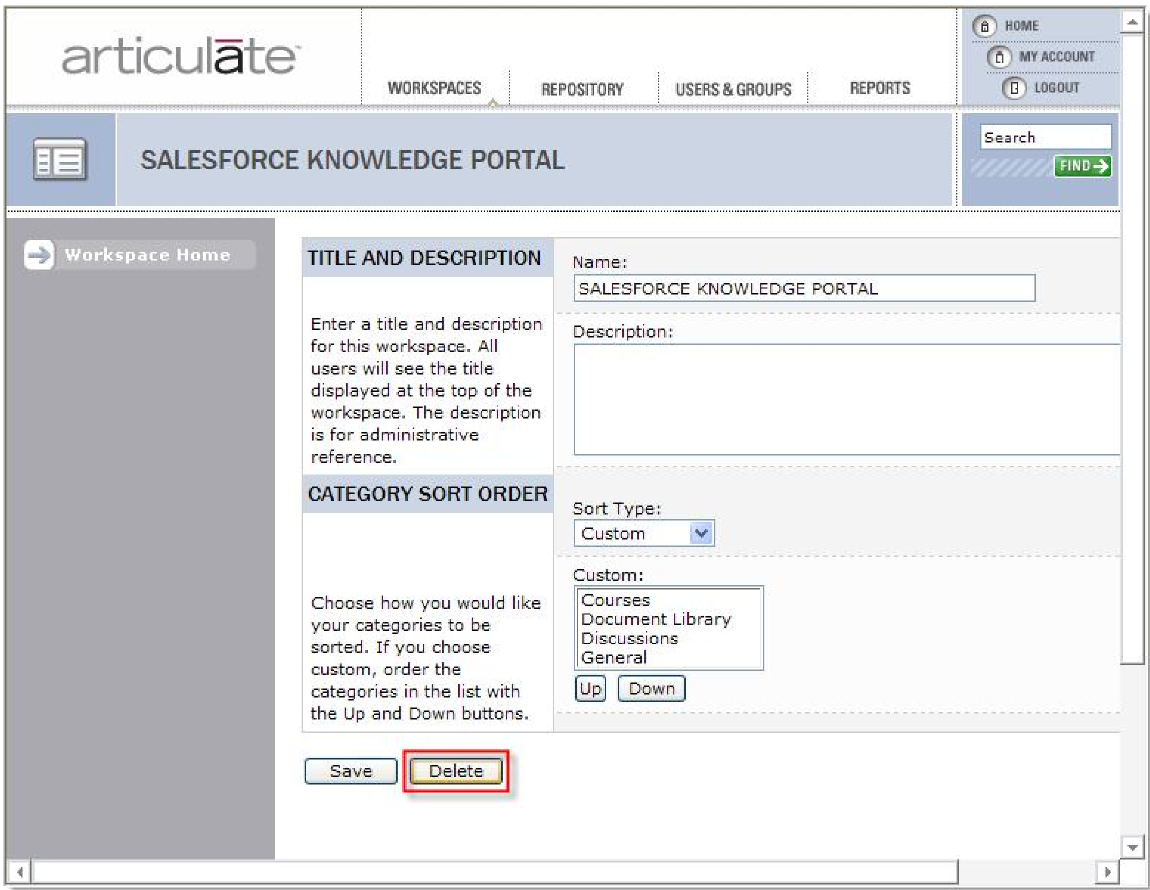


Image 9: Click the **Delete** button in Workspace Properties to delete a Workspace.

Portal Objects

Adding Portal Objects

After you have created your Workspace, you will want to add Portal Objects to it. Portal Objects are containers for the items you place in your Workspace.

Examples of Portal Objects include:

Portal Object	Purpose	Elements
Rich Text	To provide information that is best conveyed in the form of text and graphics.	Text and graphics.
Course	To provide a structured course containing repository objects.	Course Meta-data, Text and Graphics, Repository Objects.
Document	To provide quick access to repository objects.	Text and Graphics, Repository Objects.
Discussion Forum	To provide a community discussion about Workspace topics.	Discussion text.

To add a Portal Object to your Workspace:

1. Click **Edit this Workspace**.
2. Select **Add Portal Object**.
3. The Portal Object Properties screen will display.
4. Select a **Type** of Portal Object.
5. Enter a **Name** for the Portal Object.
6. Enter a **Category** for the Portal Object. (The category is used if you wish to list the Portal Object in the Left Navigation Bar.)
7. Tick the **Placement** option to list the Portal Object in the **left navigation bar**. If left unticked, the Portal Object will display on the Workspace home page.
8. If you need to share this Portal Object with other Workspaces, tick the **Share** option. If you are unsure, leave unticked; you can always come back and edit this later.
9. Click **Add**.

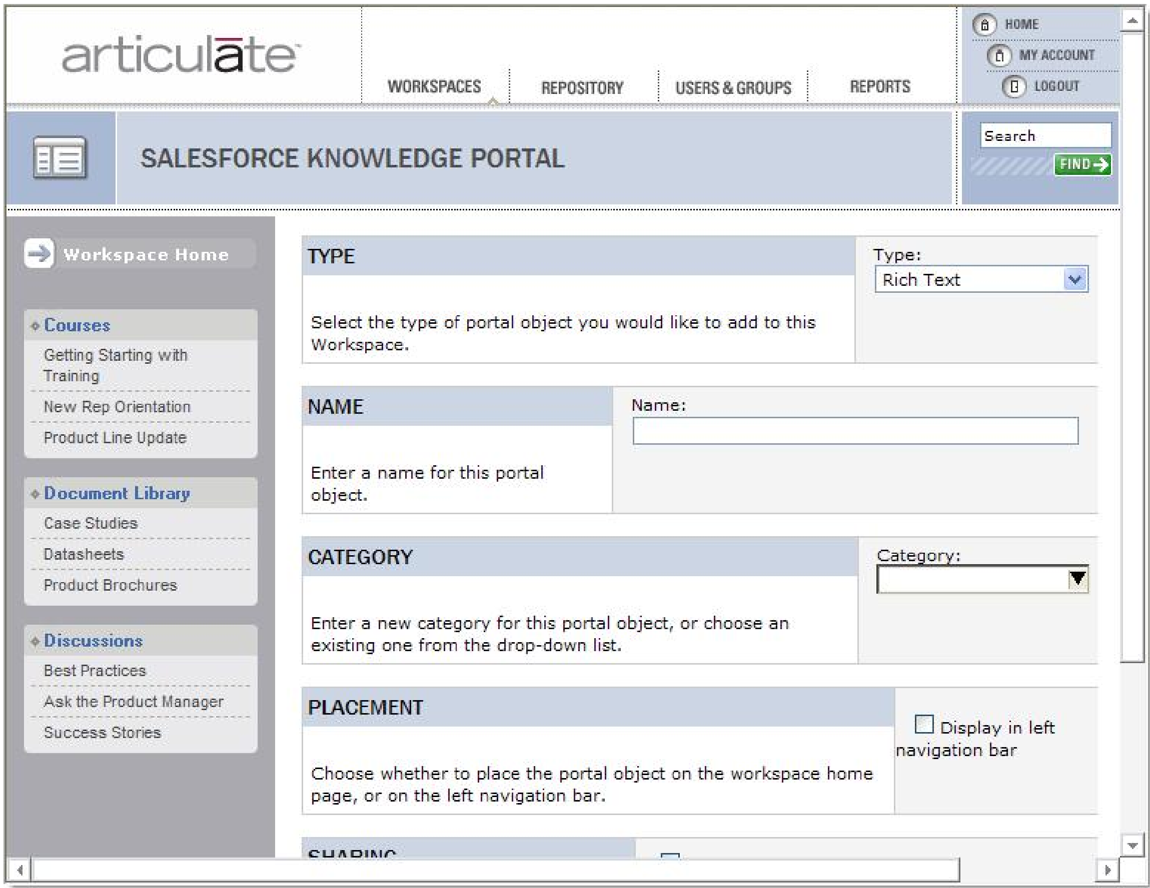


Image 10: The new Portal Object edit screen.

Tip: Once your Portal Object is created, you should edit the content in the portal object.

Setting Portal Objects Permissions

Access to Portal Objects is based on permissions granted to the user. A user's ability to view, edit, manage or delete Portal Objects is based on the permissions set for that user for a specific Portal Object.

Note: Portal Objects will automatically inherit permissions for a user account from the Workspace. If you wish to change the user permissions for a specific Portal Object, you should set permissions for the specific portal object. Most of the time it is not necessary to edit the permissions for a specific portal object since they are inherited from the Workspace.

There are three standard roles you can assign to a user account for a Portal Object. Each role has permissions associated with it.

	Roles		
Permissions	Owner	Author	Viewer
Set Permissions - Set permissions for the Portal Object.	✓		
Create - Not applicable since the portal object is already created.	n/a	n/a	n/a
Modify - Edit the Portal Object.	✓	✓	
Delete - Delete the Portal Object.	✓	✓	
View - View the Portal Object.	✓	✓	✓

In addition to **Owner**, **Author**, and **Viewer** roles, you have two other options:

Custom - Allows you to select the exact permissions desired. (For example, you might want to allow a user to have Create, Modify and View permissions, but not Delete permissions.

None - Allows you to clear any selected permissions.

To set Portal Object Permissions:

1. Click the **drop-down arrow** on the Portal Object to display its menu.
2. Click **Set Permissions**.
3. The **Permissions Window** will display.
4. Click the **Add** button to add a user or group account to the window. (Or select an existing account that is already displayed in the window.) Select a user or group. It will be added to the Permissions Window.
5. Select a **Role** from the drop-down list. Or manually select permissions by checking the radio buttons.
6. Click **Apply**.
7. Click **OK**.

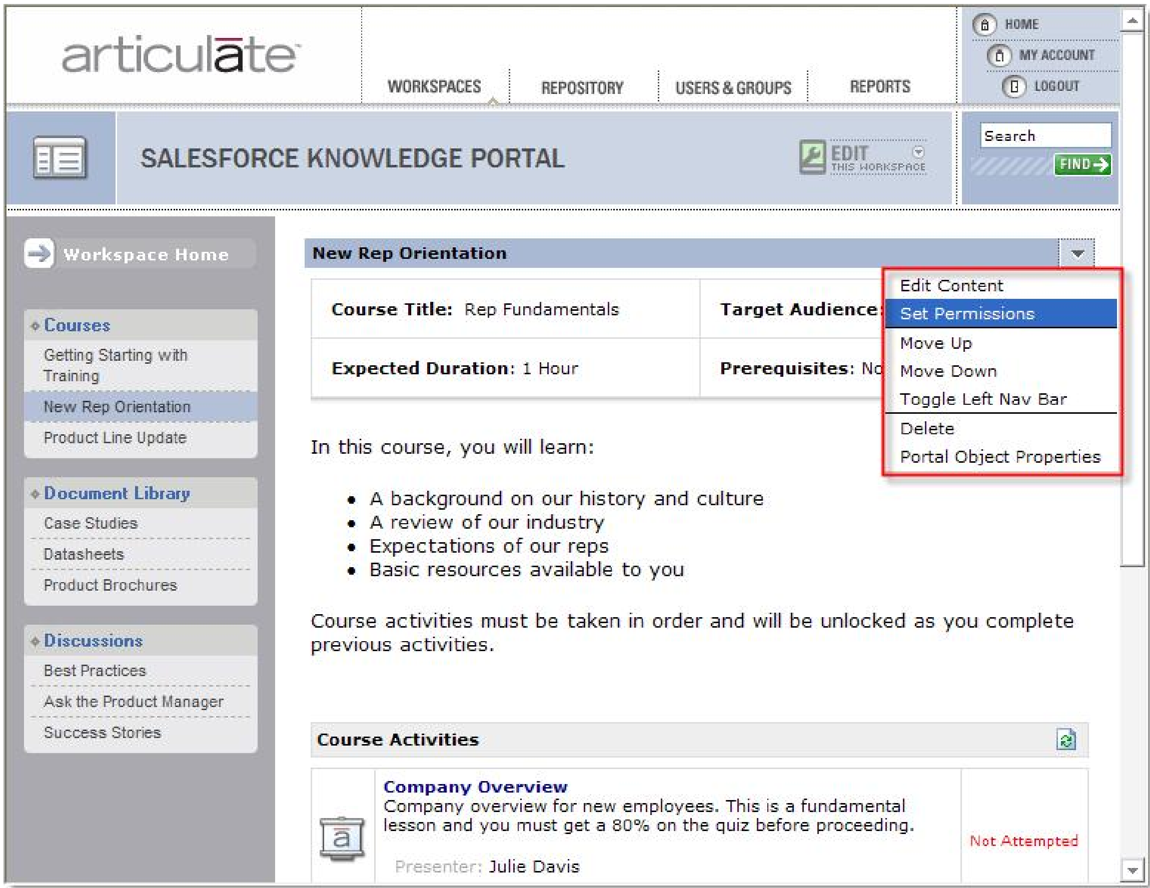


Image 11: Selecting **Set Permissions** from the drop-down menu of a Portal Object.

You can also remove permissions from a user account by selecting the user account and clicking the **Remove** button. This will clear any special permissions assigned to the user account for that Portal Object. If a user account is not in the Permissions Window, it will automatically inherit permissions from the Workspace.

Portal Objects Placement Options

Portal Objects will be placed in the Workspace in one of two areas:

1) On the **Workspace Home page**.

2) In the **Left Navigation Bar**.

You can easily toggle a Portal Object's placement between the Workspace Home page and Left Navigation Bar by opening the **Portal Object Menu** and clicking **Toggle Left Nav Bar**. In addition, you can move Portal Objects up and down among the other Portal Objects on the Home page -- as well as within a category on the left navigation -- with the **Up** and **Down** items in the **Portal Object Menu**.

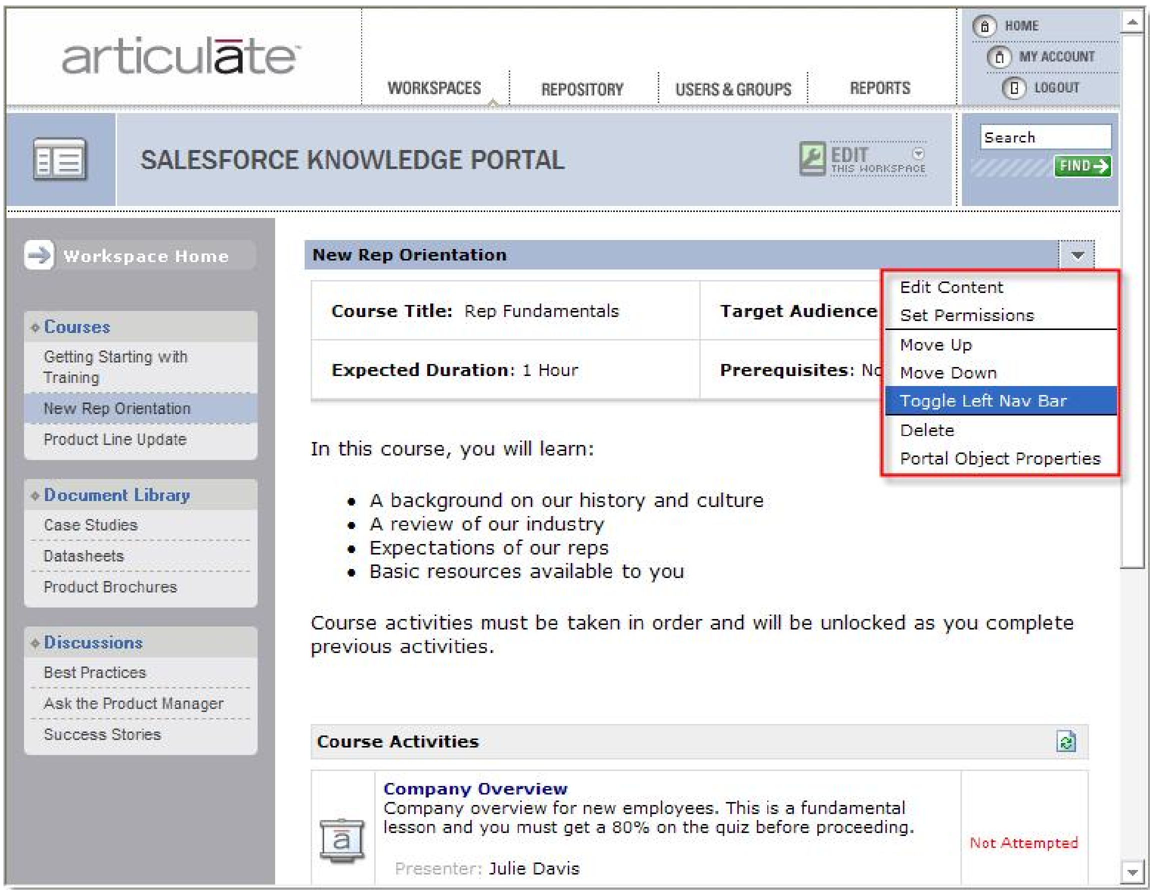


Image 12: Select **Toggle Left Nav Bar** to determine whether or not a Portal Object should appear in left-hand navigation.

Left Navigation Bar Categories

Portal Objects that are displayed in the **Left Navigation Bar** will automatically be grouped under **Categories**. This makes it easy for your users to quickly find Portal Objects with related content.

You can have an unlimited number of Categories. In addition, there are no restrictions on what you name your categories.

To edit a Category:

1. Click the **drop-down arrow** on the Portal Object to display its menu.
2. Click **Portal Object Properties**.
3. Edit the **Category** entry.
4. Make sure the **Display in left navigation bar** option is ticked.
5. Click **Add**.

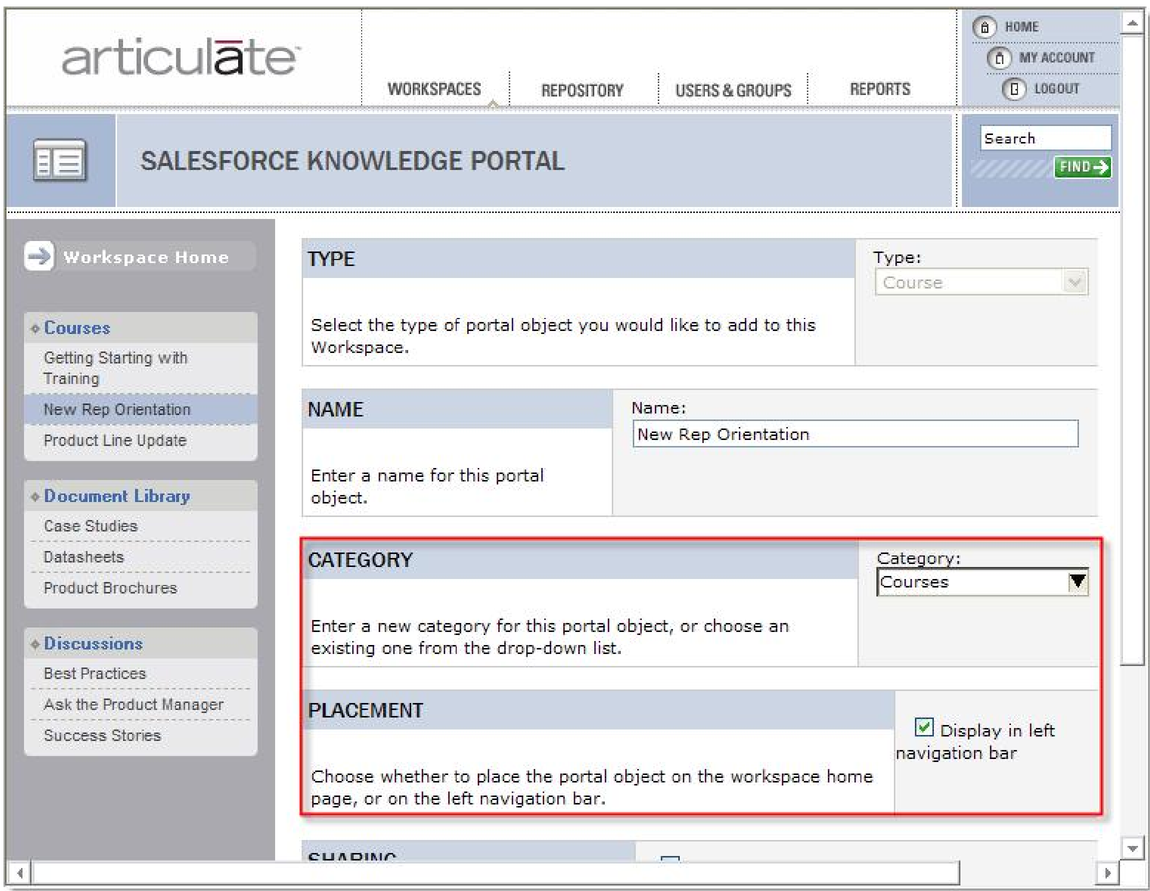


Image 13: Use **Portal Object Properties** to edit the category of the object.

A Category is **required** for every Portal Object in your Workspace.

Note: You can manage the default sort order of your category in the Workspace Properties.

Editing Portal Objects

Editing Portal Objects Overview

After you have Added a Portal Object, you will add content to the Portal Object. Depending on the type of Portal Object selected, you will have different editing options.

To edit Portal Objects:

1. Click the **drop-down arrow** on the Portal Object to display its menu.
2. Click **Edit Content**.
3. Edit the content of the Portal Object.
4. Click **Save**.

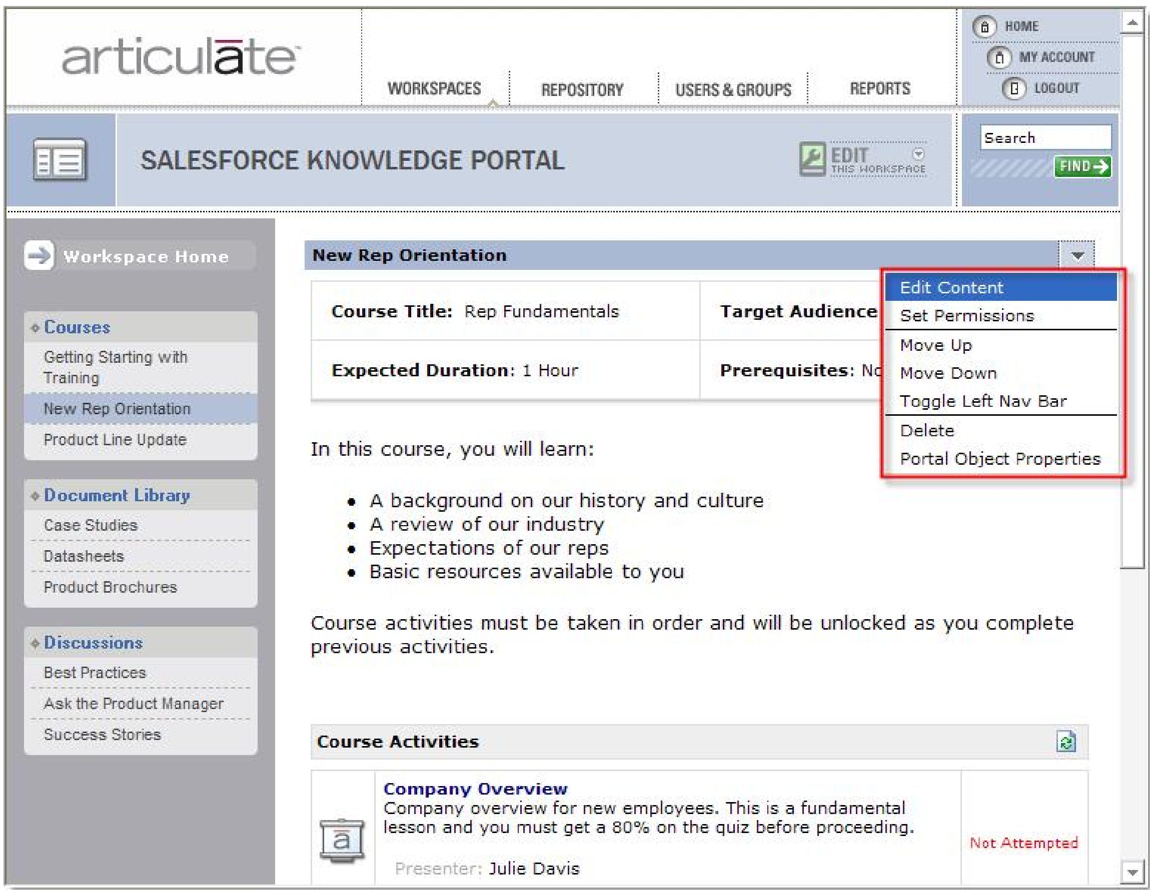


Image 14: Select **Edit Content** to edit a Portal Object's content. In this example, the administrator is going to modify the "New Rep Orientation" Portal Object.

More on Editing Rich-Text Portal Objects.

More on Editing Course Portal Objects.

More on Editing Document List Portal Objects.

More on Editing Discussion Portal Objects.

Editing Rich Text Portal Objects

Editing **Rich text Portal Objects** is a lot like using a Word Processor. You can simply type in your text and change text formatting such as bold, color, etc. You can also insert images by clicking on the image button .

If you prefer, you can edit the HTML code directly by clicking on the HTML tab 

.

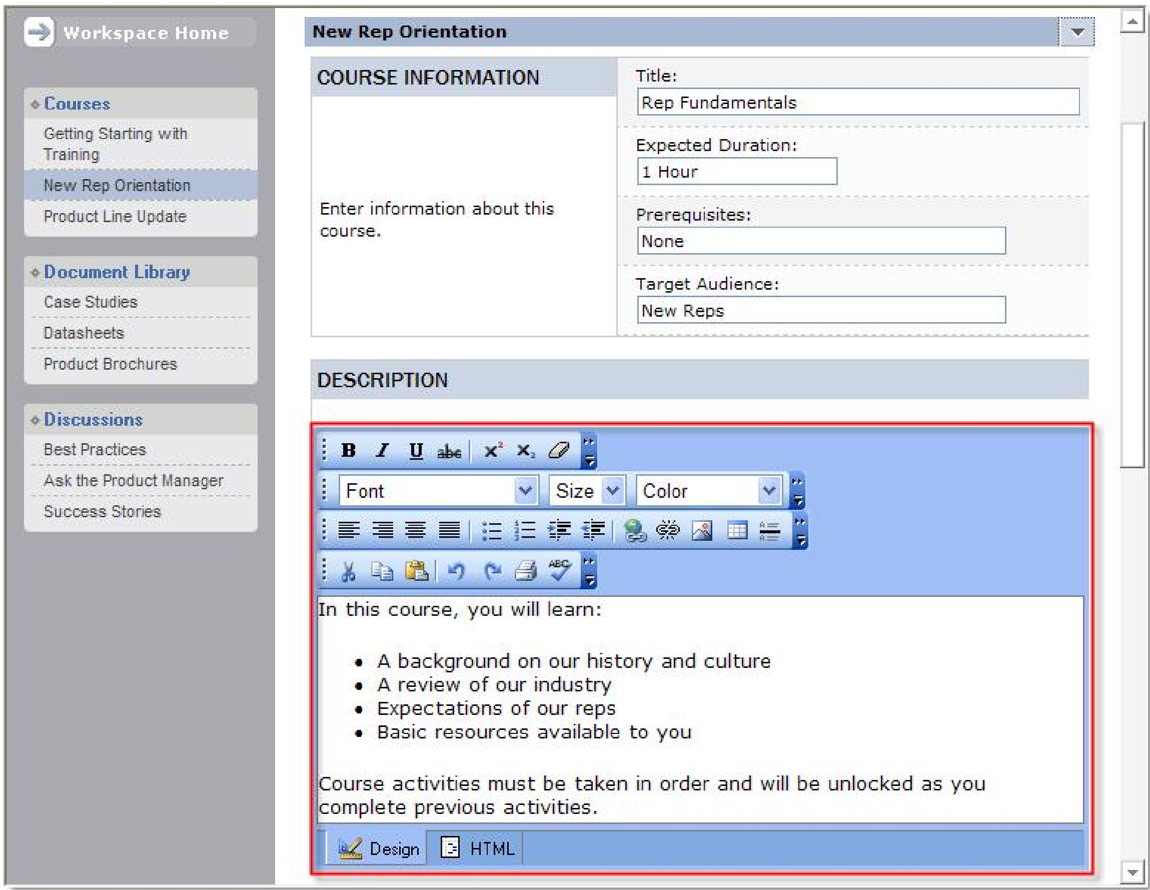


Image 15: The rich-text editor.

Note: You can also usually paste rich-text content directly into the rich-text editor that is copied from another program. When pasting, not all formatting will retain from the source content, so it may not look exactly the same as the source content.

Editing Course Portal Objects

To edit a Course Portal Object:

1. Enter the **Title**, **Expected Duration**, **Prerequisites**, and **Target Audience** in the fields provided. (Not all fields are required. These headings can be edited by Customizing Workspace Text Labels.)
2. Enter the **Course Description** in the rich-text editor. (You use the rich-text editor in the same manner as when Editing Rich-Text Portal Objects.)
3. Click the **Add Repository Object** button.
4. Browse to the desired repository object and click the **Open** button.
5. If desired, edit the repository object's description text to change how it will display in this course. (This will not change the object's description in the repository.)
6. If you wish to add additional repository objects, first click the **Add** button to the right of the **Description** field, then repeat steps 3-5 above for each object you would like to add.
7. If you wish to require that users advance through a course in a specified order, check the box next to **Course activities must be taken in sequence**. Doing so will prevent a user from advancing to subsequent objects until a previous object has been completed. See below section, To activate Course Sequencing, for more details.
8. If you wish to provide your users with the option of viewing and/or printing a certificate upon course completion, check the box next to **Enable Certificate**. Doing so will allow you to choose a certificate associated with this course. You must already have a certificate uploaded to your Repository. See below section, To provide a Course Certificate, for more details.
9. Click **Save**.

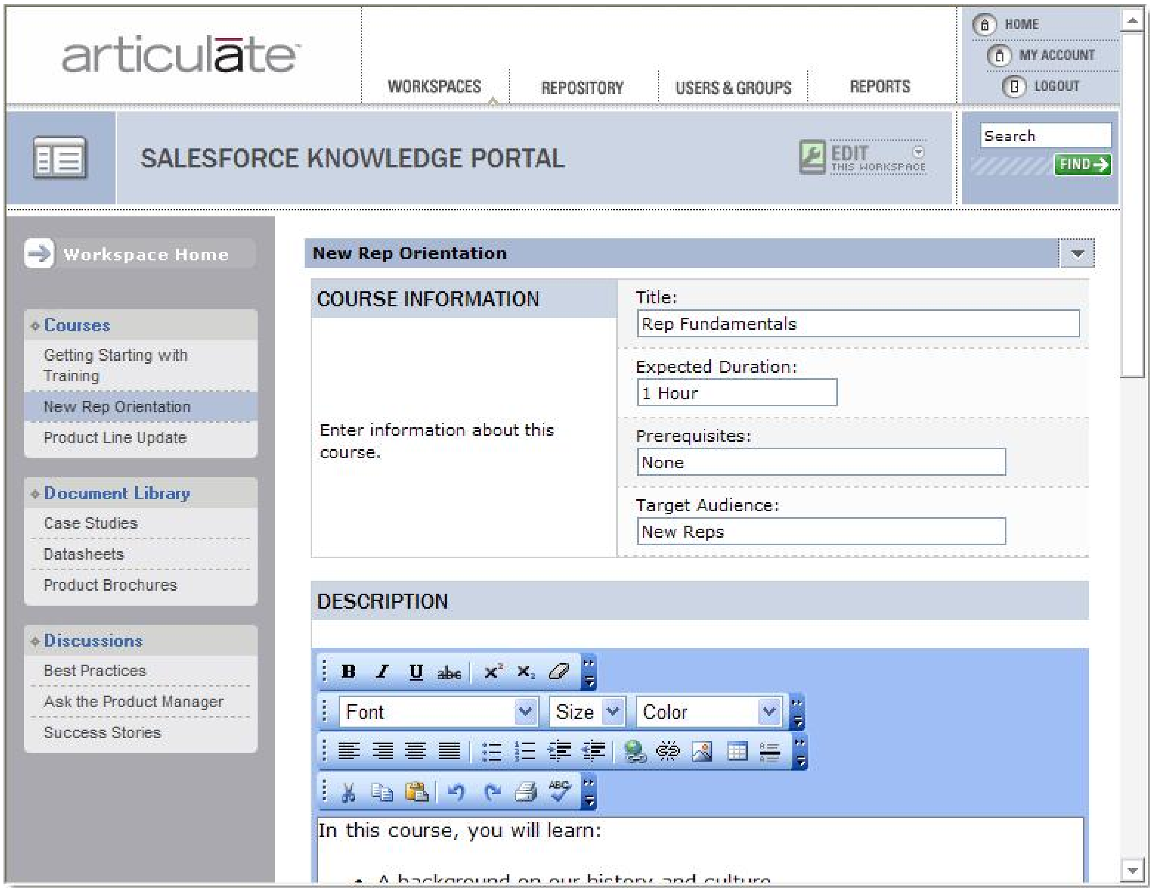


Image 16: Editing the "New Rep Orientation" Course Portal Object.

To activate Course Sequencing:

1. **Create** a new or **Edit** an existing Course Portal Object.
2. Check the box in the **Sequence** section that says, "Course activities must be taken in sequence."
3. Click **Save**.

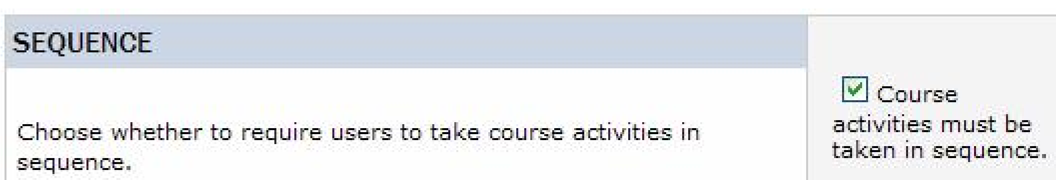


Image 17: Check the box to activate Course Sequencing.

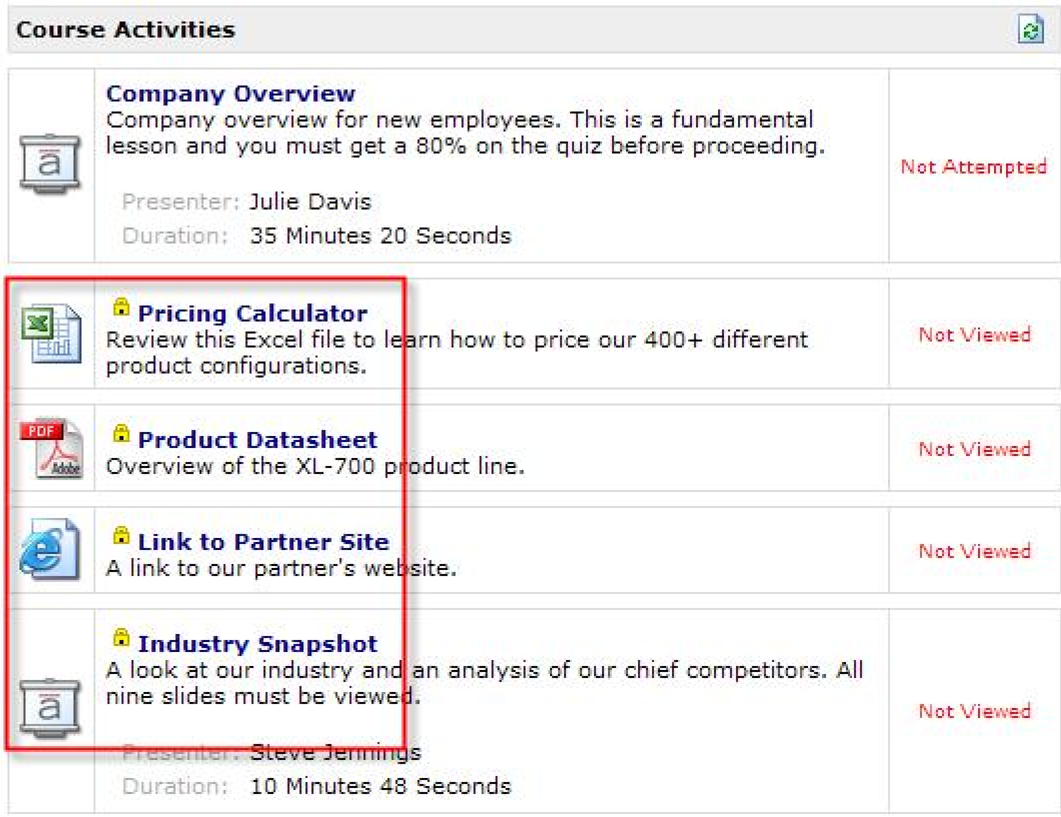


Image 18: A Course Portal Object with Course Sequencing active. Note the **lock icon** () next to each object title. None of the objects in this example can be accessed by users until "Company Overview" has been completed.

To provide a Course Certificate:

1. **Create** a new or **Edit** an existing Course Portal Object.
2. Check the box in the **Certificate** section that says, "Enable Certificate."
3. Click the **Choose Certificate** button that appears.
4. Navigate to and select the certificate file (**.cert**) that you wish to associate with this course. See below section, To create a Certificate File, for details on creating a certificate file.
5. Click **Open** to select the certificate file of your choice.
6. Click **Save**.

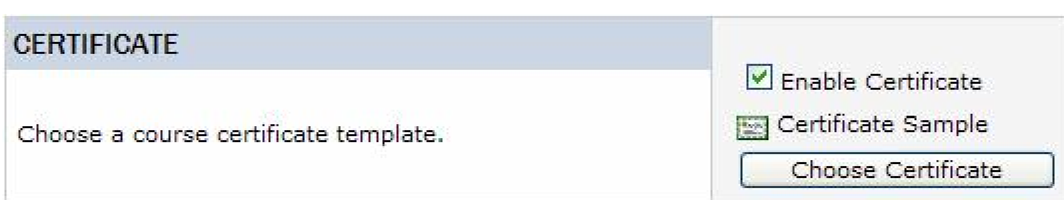


Image 19: Check the box and select a **.cert** file from the Repository to enable a **Certificate** for this course.

To create a Certificate File:

A certificate is any HTML file and its supporting files, if any (images, CSS, etc.). To allow Articulate Knowledge Portal to read your HTML certificate, name the starting file **certificate.html**, **zip** the file and its supporting files, **rename** the zip file with a **.cert** extension, and upload to your Repository. See below for the list of available variables.

Alternatively, use the following PowerPoint-based method:

1. **Download** this sample certificate and **open** in PowerPoint.
2. **Customize** the certificate's design and/or variables to your liking. (You can create and store in your Repository as many certificates as you'd like.) The following is a list of certificate variables supported by Articulate Knowledge Portal (include brackets when customizing your certificate):
    - [FirstName]
    - [LastName]
    - [MiddleName]
    - [Company]
    - [Department]
    - [JobFunction]
    - [Email]
    - [Phone]
    - [Fax]
    - [Course]
    - [TargetAudience]
    - [ExpectedDuration]
    - [Prerequisites]
    - [CourseDescription]
    - [CourseCompletionDate]
3. **Save** your PowerPoint file.
4. Go to **File** -> **Save As** and change **Save as type** to **Web Page (*.htm; *.html)**.
5. Navigate to the location where you saved the HTML version of your certificate and open the **<file name>_files** directory. For example, if you saved your file as "certificate_sample.htm," then open the folder in the same location called "certificate_sample_files."
6. Locate the file named **slideXXX.htm** and rename it to **certificate.htm**.
7. **Zip** the contents of this directory and change the file extension from **.zip** to **.cert**.
8. **Upload** your new **.cert** file to the Repository.

Image 20: The sample certificate, available for download here.

Editing Document List Portal Objects

Editing **Document List Portal Objects** is similar to [Editing Rich-Text Portal Objects](). You will be able to use a rich-text editor, as well as add **Documents** and **Links** from your repository.

To edit a Document List Portal Object:

1. Input or copy & paste into the rich-text editor the text you would like to use in your Document List.
2. In the **Documents and Links** section, click **Add Repository Object** to open the Repository selection window.
3. Locate the Portal Object you would like to add to your Document List and click **Open**. The window will close and you will see the Portal Object added to your Document List.
4. If desired, edit the repository object's description text to change how it will display in this Document List. (This will not change the object's description in the repository.)
5. If you wish to add additional repository objects, first click the **Add** button to the right of the **Description** field, then repeat steps 2-4 above for each object you would like to add.
6. Click **Save** to save the changes to your Document List

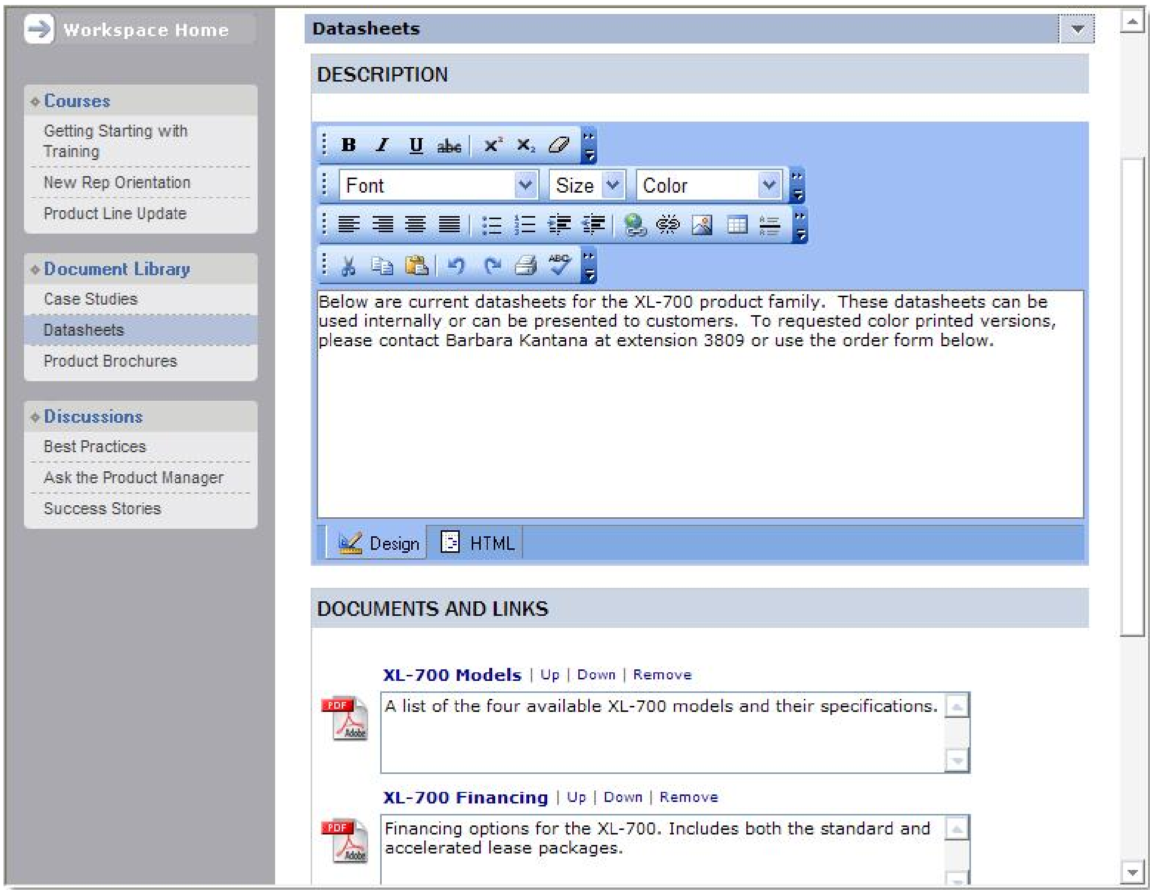


Image 21: Editing a Document List Portal Object.

Editing Discussion Portal Objects

Discussion Portal Objects allow you and your users to post comments.

To edit a Discussion Portal Object:

1. After you've created your **Discussion Portal Object**, it is ready to use.
2. Input **Title** and **Comments** for your post.
3. Click **Post** to save your comment to the **Discussion Portal Object**. Your comment will appear in the object along with a date and time stamp.

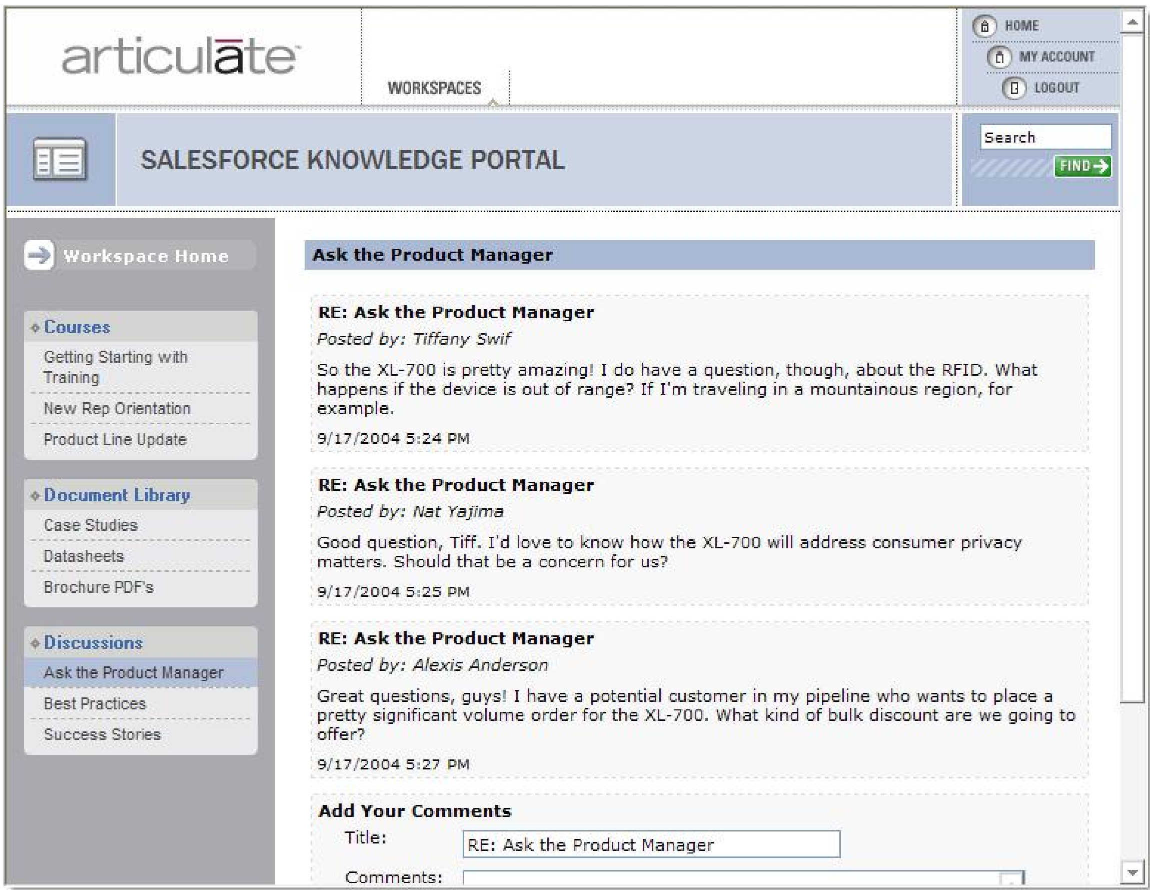


Image 22: A Discussion Portal Object with several users discussing a new product in the "Ask the Product Manager" forum.

Shared Portal Objects

Understanding Shared Portal Objects

Often it is convenient to display the same Portal Object in multiple Workspaces. Workspaces allow you to do this with **Shared Portal Objects**. Shared Portal Objects will display identical content in all Workspaces where they are located.

To Share a Portal Object

1. Click the **drop-down arrow** on the Portal Object to display its menu.
2. Select **Portal Object Properties**.
3. Scroll to the **Sharing** section and tick the **Share** option.
4. Provide a unique share name so you can recognize this Portal Object when choosing from a list.
5. Click **Add**.

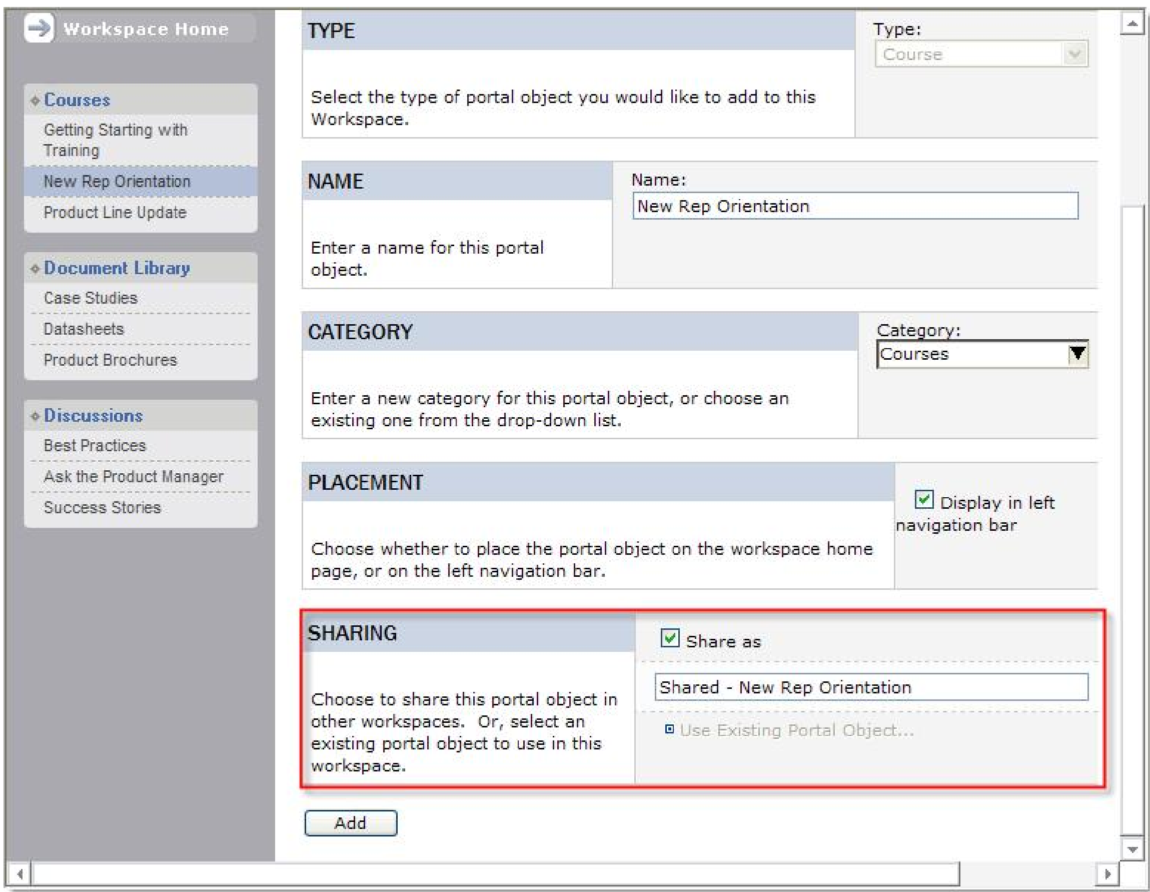


Image 23: Specifying that a Portal Object should be shared across Workspaces.

Using Shared Portal Objects

Once a Portal Object is shared, you can display it in any Workspace.

To use a shared Portal Object:

1. Click **Edit this Workspace**.
2. Select **Add Portal Object**.
3. Scroll to the **Sharing** section and click "**Use Existing Portal Object**."
4. Select the Portal Object from the list.
5. Click **Add**.

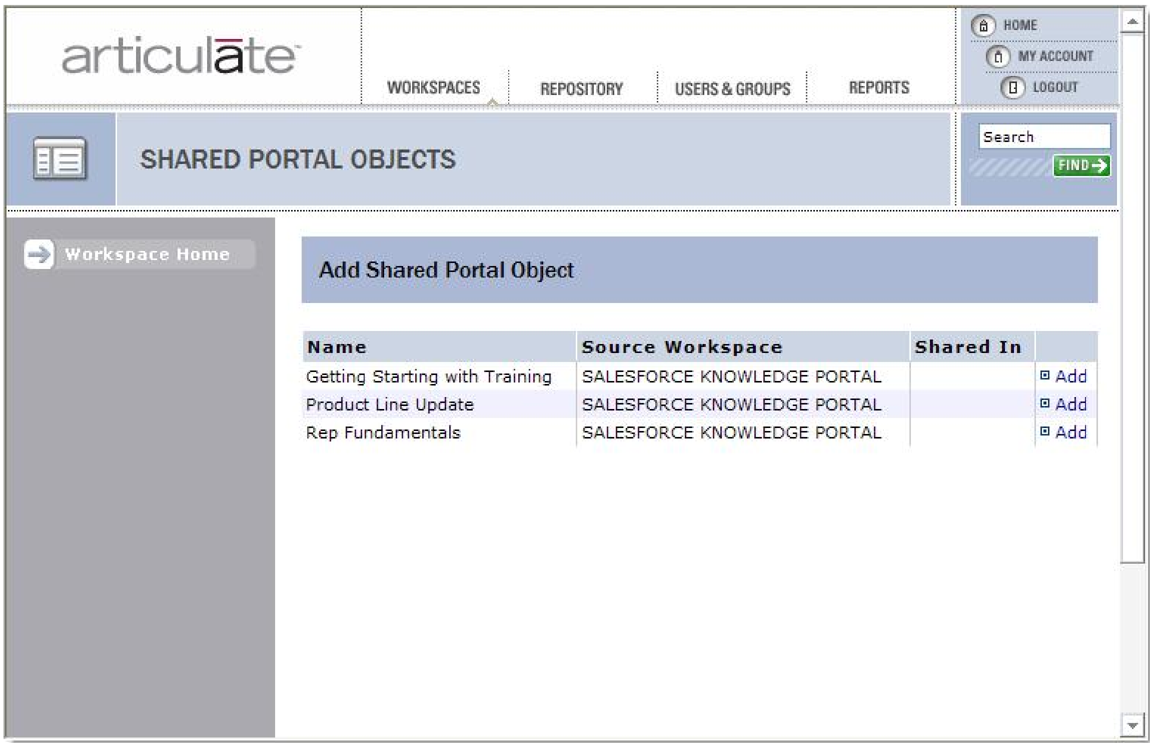


Image 24: Click the "Add" link next to the Shared Portal Object you would like to add to your Workspace.

Note: You can edit the placement options for the shared Portal Object if you want to place it somewhere else in the Workspace than the source Portal Object.

Tracking User Progress

Portal Object Status

If your Workspaces contain Articulate Presenter presentations, your users can track their progress in the Workspace. Of course, detailed tracking is available to administrators from the Reports module.

Note: For more on **publishing,** refer to the **Publishing Content to Articulate Knowledge Portal** section of the Articulate Presenter Documentation (link will open new window).

There are two ways to track user progress:

1. **View-based tracking:** This method will display a percentage equivalent to the user's progress through the Articulate Presentation, where 100% equals a number of slides (some or all) specified during the publish process. A Portal Object that has not yet been attempted will show a status of "Not Viewed." If the Portal Object is in progress, the status will display the percent complete.
2. **Quiz-based tracking:** This method will display the results of the quiz designated for tracking during the publish process. If a quiz has not yet been taken, the status will display as "Not Attempted." Other quiz statuses include "Incomplete," "Failed," and "Passed."

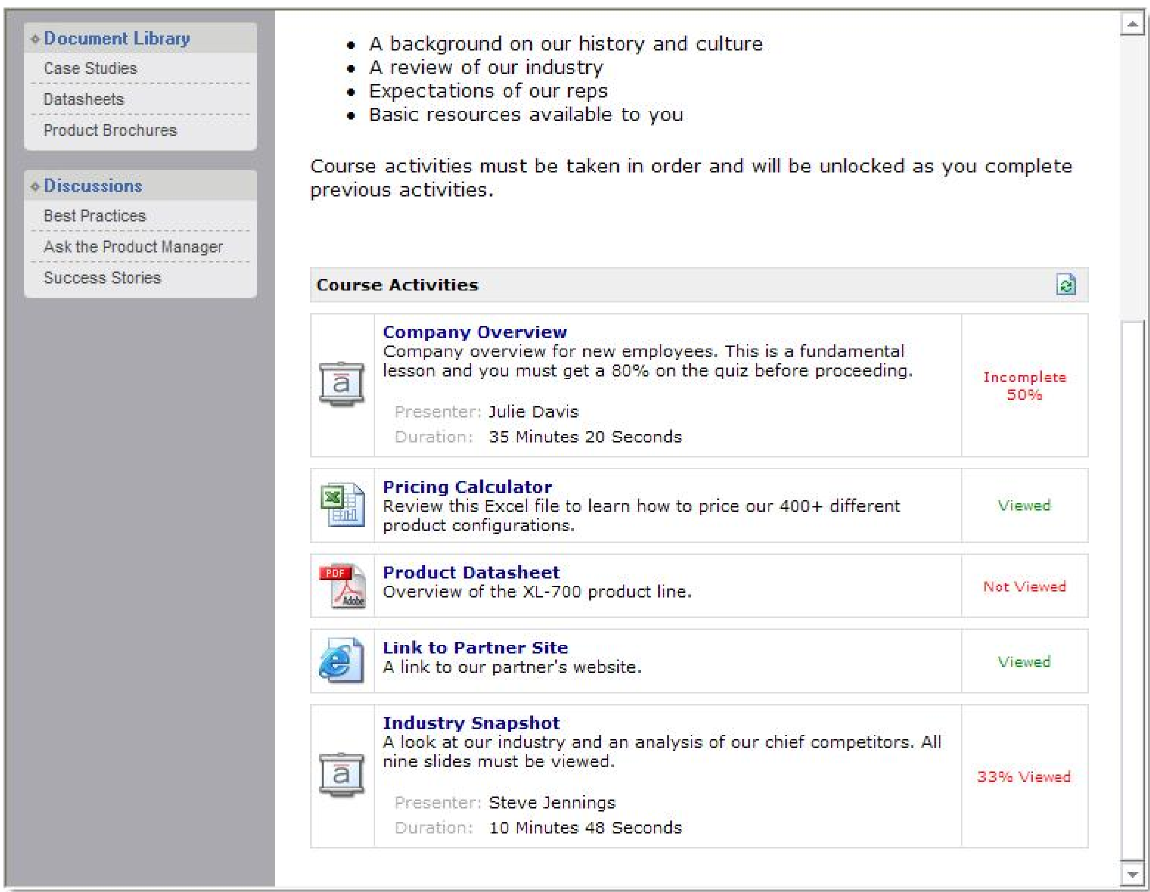


Image 25: A Portal Object showing a variety of progress states for each of the objects.

User Management

Users & Groups

The Users & Groups section of the Articulate Knowledge Portal is where you manage individuals and groups who will access your Workspaces. In this area you can do the following:

- View edit existing accounts
- Create new users
- Create new groups
- Import accounts from a spreadsheet

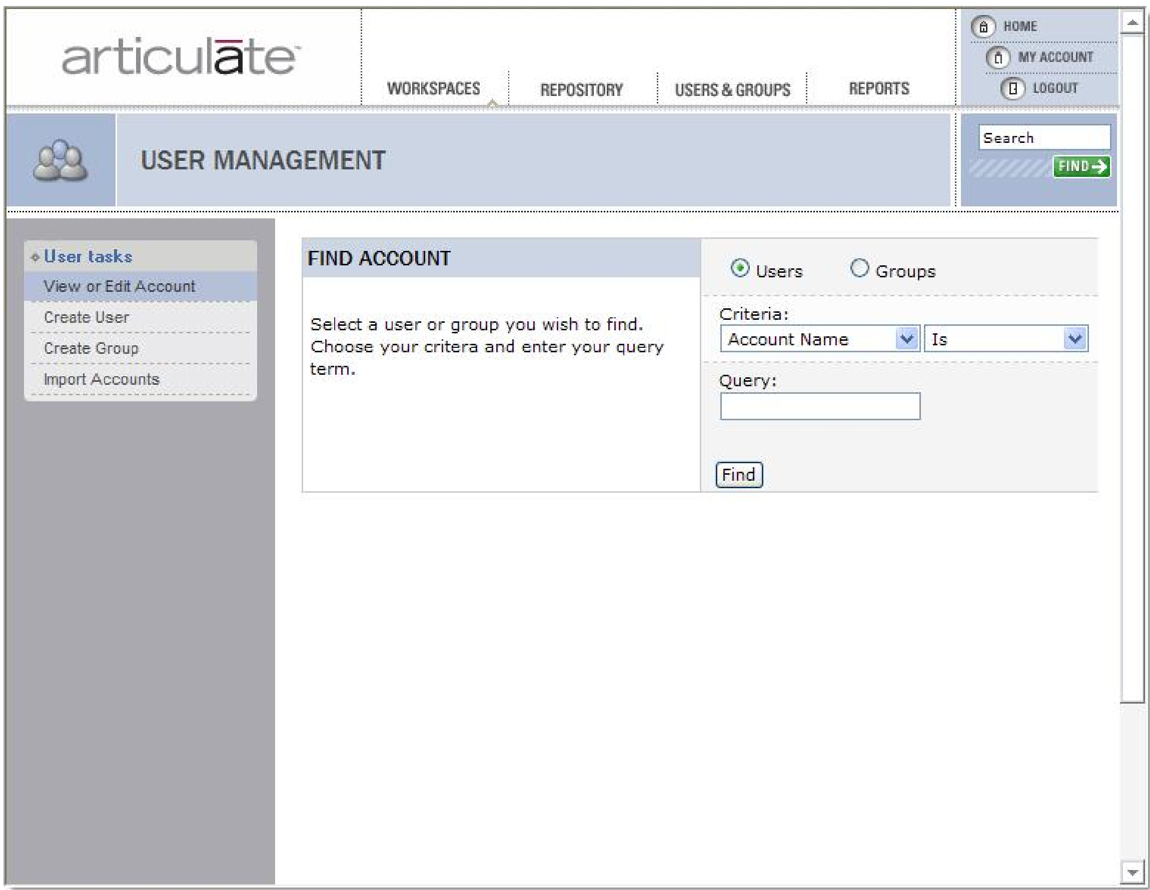


Image 26: The Users & Groups section of Articulate Knowledge Portal.

View or Edit Account

When you first access the Users & Groups section of the Articulate Knowledge Portal, you will see an interface that allows you to search for the **User** or **Group** you wish to **view** or **edit**.

To find an account:

1. Click the radio button next to either **Users** or **Groups**.
2. Select your search **Criteria** (Account Name / First Name / Last Name *and* Is / Contains / Starts With / Ends With).
3. Enter your search **Query**.
4. Click **Find**.

For example, the following search criteria:

Account Name Contains yajima

...will return a listing of all user accounts with "yajima" anywhere in the username.

You will see a listing of each account with the option to **Edit** or **Delete**.

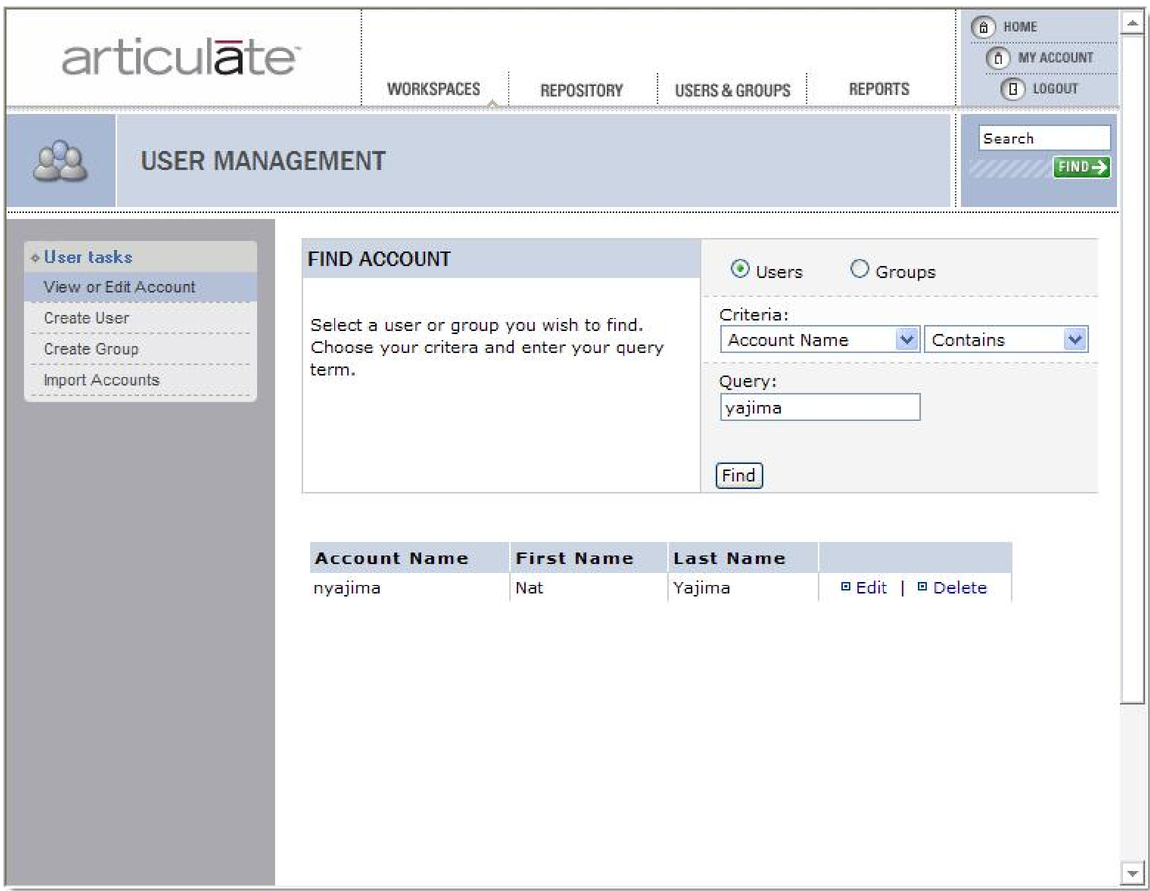


Image 27: Searching for an account based on partial username (Account Name Contains "yajima"). Note that the full account name is "nyajima."

To edit a user:

1. After performing a search as described above, click the **Edit** link next to the account you wish to modify.
2. You will see the **user detail screen** with the following sections: Name, Company Information, Contact Information, Password, Account Expiration, Default Workspace, Group Membership, Reporting Permissions, Reports. (See below for more details on each of these sections.)
3. Make any desired modifications to the user account.
4. Click **Save.**

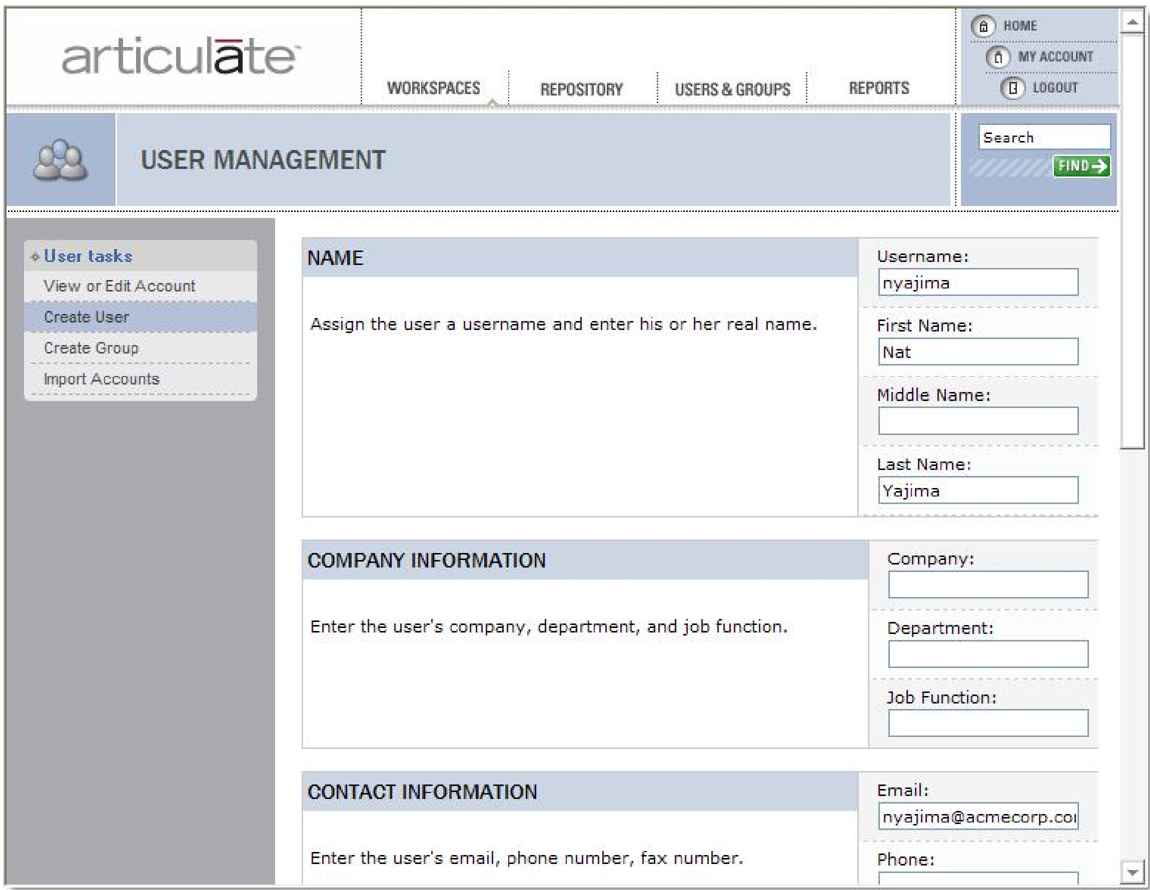


Image 28: Editing an existing user account.

Fields in the User Detail Screen

Name	There are 4 fields in this section: • Username: The login name for this user. • First Name: The user's first name. • Middle Name: The user's middle name. • Last Name: The user's last name.
Company Information	There are 3 fields in this section:

	• Company: The company name for this user. • Department: The user's department. • Job Function: The user's job, perhaps a title.
Contact Information	There are 3 fields in this section: • Email: The user's email address. • Phone: The user's phone number. • Fax: The user's fax number.
Password	There are 2 fields in this section: • Password: The user's password. • Confirm: Confirm the user's password.
Account Expiration	Optionally, use this field to set the date when this account should expire. You can customize the text that will be displayed to the user when he or she reaches the date of expiration. See Customizing Workspace Text Labels for more details.
Default Workspace	Use this drop-down menu to select the Workspace with which this user should be associated by default.
Group Membership	Use this interface to manage the groups with which the user is associated. To associate a new group with the user: 1. Click the **Browse** button to open a group search window. 2. In the Find Account window, enter your **search criteria**. 3. Click **Find**. 4. Click the checkbox next to the group or groups in the resulting list to which you would like to add the user. 5. Click **OK**. 6. When you are returned to the User Detail Screen, click the **Add** link to associate the user with the group or groups you have just selected. 7. Be sure to click **Save** on the User Detail Screen if you've made any changes. **Note:** This section will only display when viewing or editing an existing account; it will not display when creating a new account.
Reporting Permissions	Controls which accounts should have the ability to run reports on this user. To assign reporting permissions: 1. Click **Select** to open the Reporting Permissions window. 2. Click **Add** to open the Find Account window. 3. Search for the user account or accounts you'd like to give reporting permissions. 4. Click **OK** to save and close the user account search window. 5. Click **OK** to save and close the Reporting Permissions window. 6. Be sure to click **Save** on the User Detail Screen if you've made any changes. **Note:** If no options are selected, only Administrators can report on this user. This is usually sufficient for most companies. This section will only display when viewing or editing an existing account; it will not display when creating

	a new account.
Reports	Use this section to run a quick report on this user (Activity Report or Quiz Report). **Note:** This section will only display when viewing or editing an existing account; it will not display when creating a new account.

Create User

Use the Create User section to add user accounts to your Articulate Knowledge Portal.

To create a new user:

1. Click the **Create User** link.
2. Fill in the fields on the **User Detail Screen**. See View or Edit Account for details on each section.
3. Click **Save** to create the new user account.

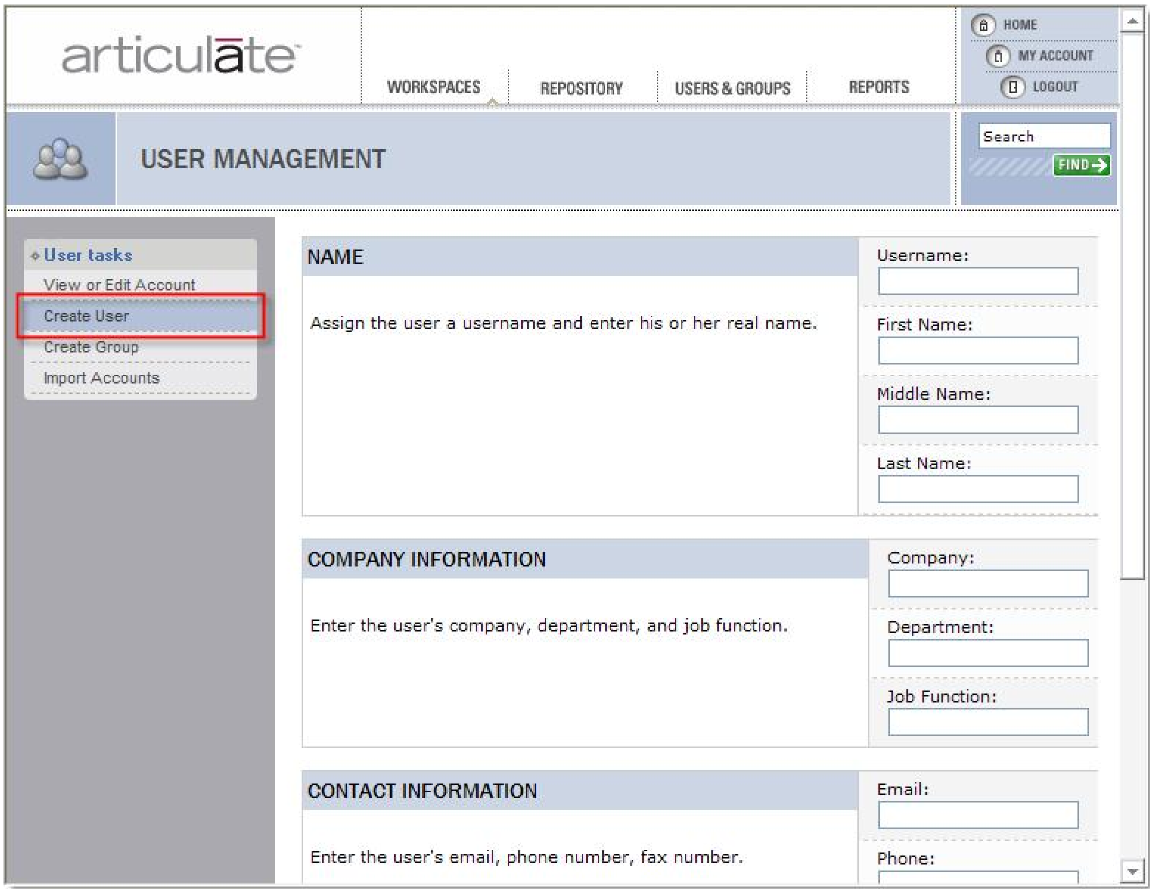


Image 29: Click **Create User** to access the user creation form.

Create Group

Use the Create Group section to add new groups to your Articulate Knowledge Portal.

To create a new group:

1. Click the **Create Group** link.
2. Give your group a **Name** and, optionally, a **Description**.
3. Click **Save** to create the new group.

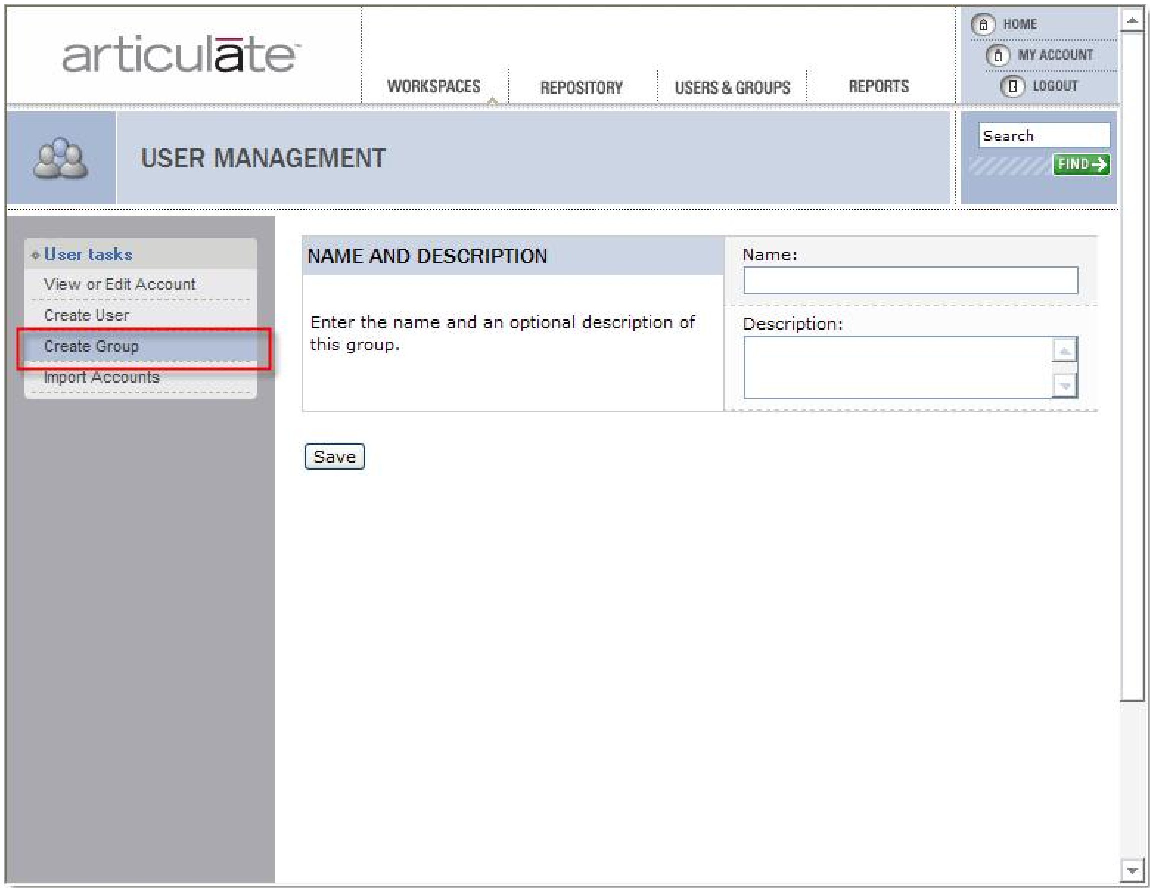


Image 30: Click **Create Group** to create a new group.

Import Accounts

Use the Import Accounts section to add user or group accounts in bulk to your Articulate Knowledge Portal.

To Import Accounts:

1. Download the file user_upload.csv.
2. Fill in all data that you would like imported for each user. (USERNAME, FIRST NAME, LAST NAME, EMAIL and PASSWORD are required; other fields are optional.) Be sure to leave the first heading row intact.
3. If a group entered in the GROUP column does not exist, it will automatically be created and add the user to it.
4. You can add a user to more than 1 group by separating each group name with a pipe: |. For example, "Northeastern Reps|Senior Sales Team|Executives" (no quotes) will add the user to all 3 of these groups.
5. Search for and delete all commas in your data. (Since this is a comma seperated import, commas in your data will break the import.)
6. After you have added your data, be sure to save the file as .CSV format. Browse on this page to locate the file on your computer, then click Upload.

Note:

Any data in this file will always update data for existing users already in your account. For example, if you make changes in the CSV to data associated with username "bsmith," the data in the CSV – even if it's blank – will overwrite the data stored in Articulate Knowledge Portal for that user.

Articulate recommends using the bulk upload only to add new accounts so that you do not inadvertently reset a password that an existing user may have updated.

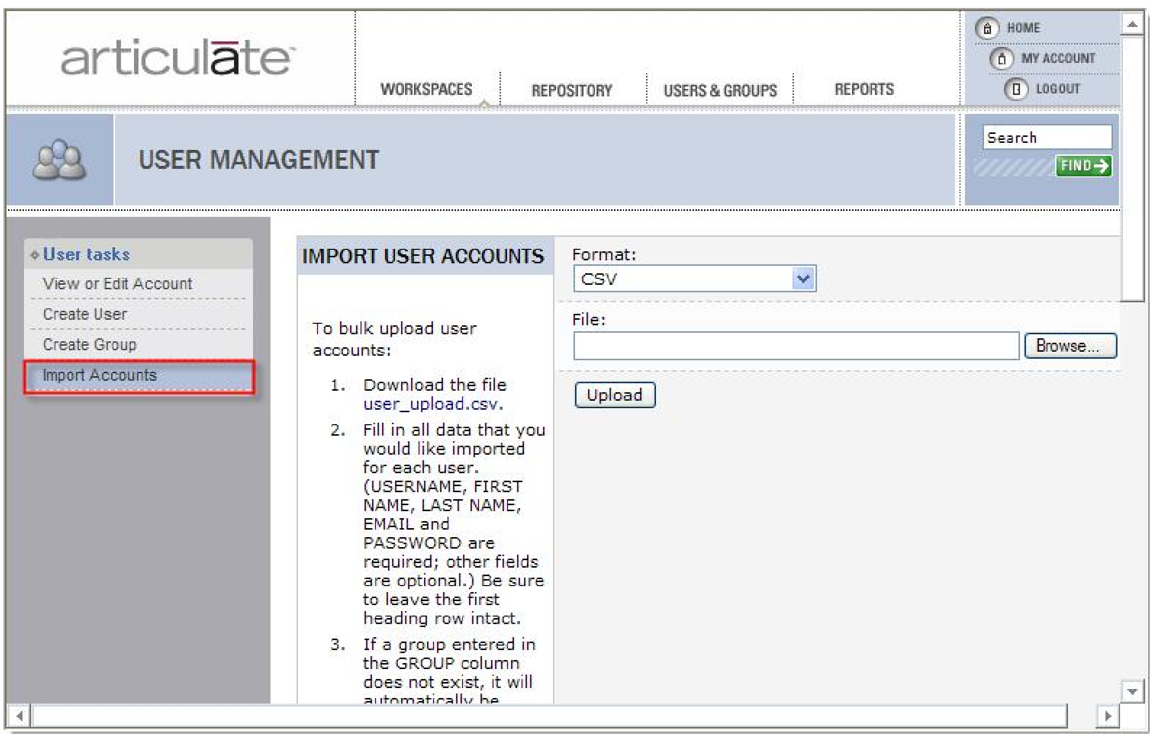


Image 31: Click **Import Accounts** to import a CSV containing new user data.

Reports

Reports Overview

Articulate Knowledge Portal tracks how your users interact with your presentations, e-learning courses, quizzes, and all other types of content stored in your Workspaces. Administrators and other users with sufficient reporting privileges can run the following types of reports to see usage activity:

Report Type	Purpose
User and Group Reports	Provide details on user and group activity.
Object Reports	Provide details on objects in your Workspaces and how your users and groups interact with them.
Course Reports	Provide details on courses and their completion statuses.
Site Reports	Provide details on overall activity in your site.

All reports are available in the **Reports** section of Articulate Knowledge Portal.

To access Reports:

1. Click **Reports** on the toolbar.
2. Use the left-hand navigation to access the type of report you would like to run.

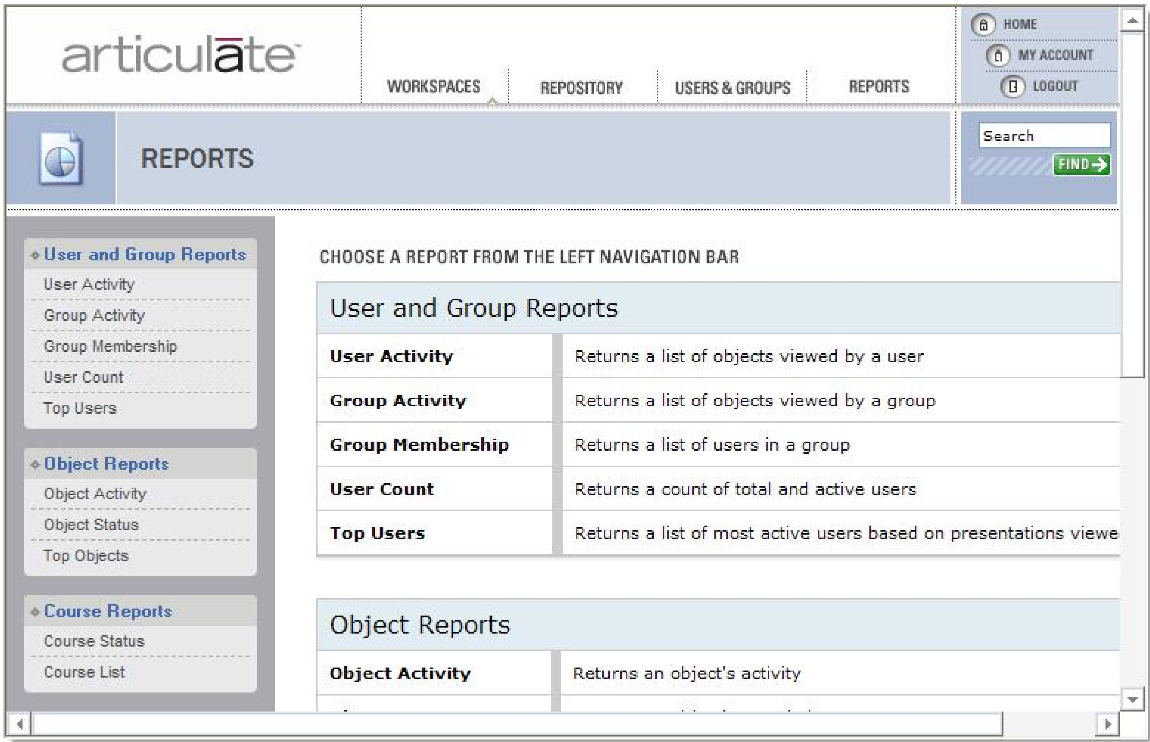


Image 32: The main Reports page.

User & Group Reports

User Activity

Articulate Knowledge Portal tracks how your users and groups interact with your presentations, e-learning courses, and all other objects in your Workspaces.

To run a User Activity Report:

1. Click **Reports** on the toolbar.
2. Click **User Activity** under the **User & Group Reports** category.
3. Type the username or click **Browse** to search for the user on whom you are running the report.
4. Click **Run Report**.

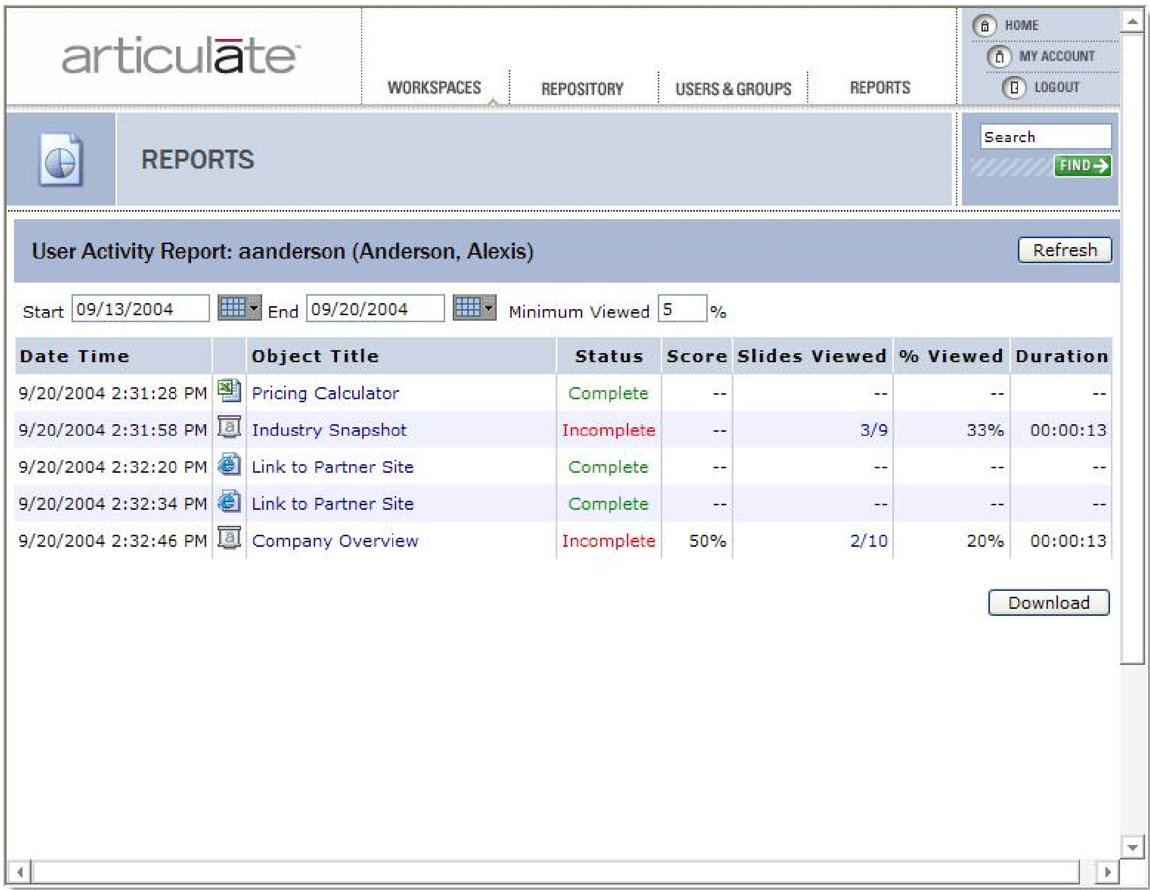


Image 33: The results of a User Activity Report.

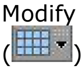
The **User Activity Report** will show you the following details, representing the activity of the selected user:

Column Name	Description
Date Time	The date and time the object was last accessed by the user.
Object Title	The title of the object.
Status	The status of the object. If tracking is view-based: • Incomplete • Complete If tracking is quiz-based: • Incomplete • Passed
Score	For quiz-based tracking, the score out of 100.
Slides Viewed	The number of slides viewed out of the total number of slides.
% Viewed	The percentage of slides viewed.
Duration	The time the user has spent viewing the presentation.

You will also see an unnamed column to the right of Date Time that displays an icon representing the type of object.

You can filter the User Activity report based on a date range you specify and/or Minimum percent viewed.

To filter the User Activity Report:

1. Modify the **Start** date of the report either by inputting it manually or clicking the calendar () icon to display a calendar; select a new Start date from the calendar by navigating to the month in question and clicking the date.

2. Modify the **End** date of the report using one of the methods described above.

3. If desired, modify the **Minimum Viewed** percentage. This refers to the percentage of a presentation the user has viewed. For example, if you set this value to 10%, only those presentations that have been at least 10% viewed by the user will be included in the report.

4. Click the **Refresh** button.

You can click certain fields in the report to see additional detail related to that data field.

Clickable Fields in the User Activity Report

Object Title	Click the name of any **Object Title** to run a report showing all users who have accessed the object. See the section on the Object Activity Report for more details.
Slides Viewed	Click the value in any **Slides Viewed** field to run a report showing the specific slides of the object viewed by the user.

Once you're satisfied with the output, you can **Download** the report as a comma-separated value (CSV) file.

To Download your report:

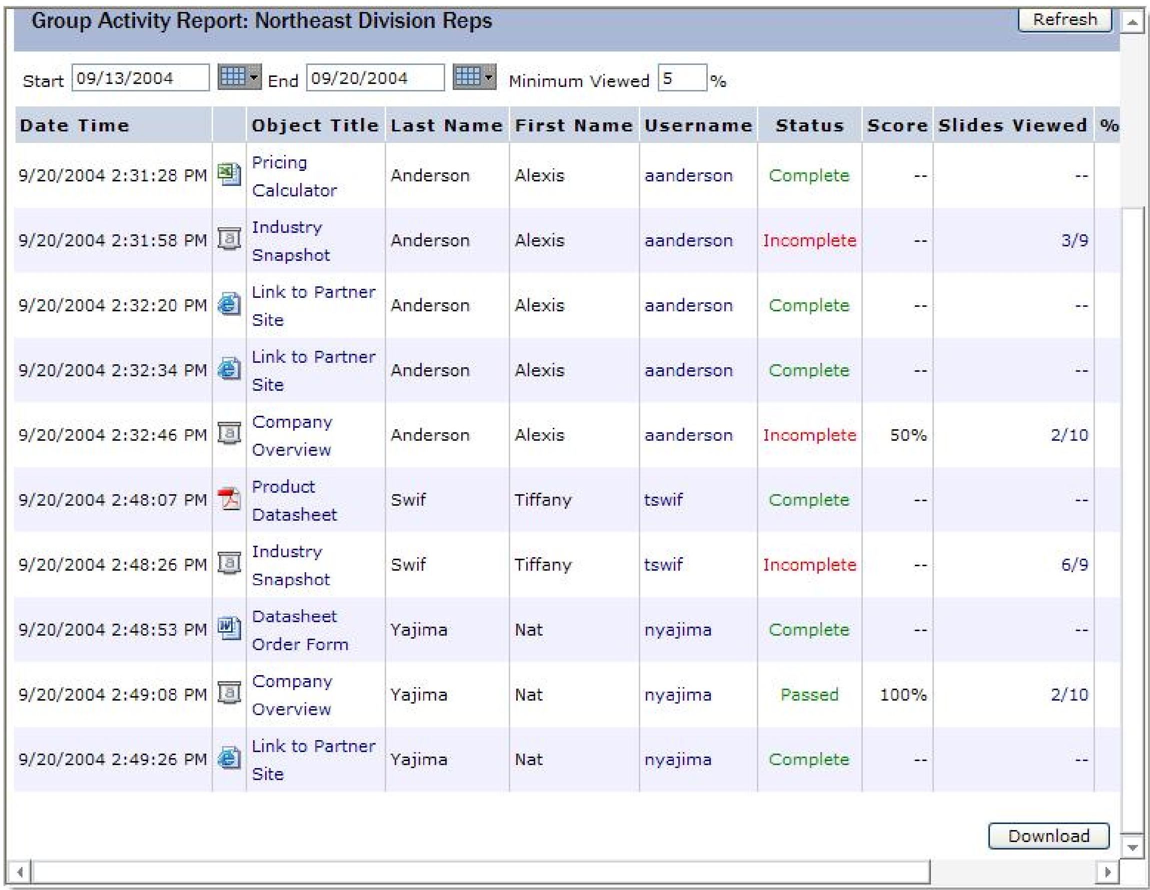
1. Click the **Download** button at lower right of report.
2. You will see a **File Download** dialog window.
3. Click **Save** to name your report and save it to your local computer.

Group Activity

Articulate Knowledge Portal tracks how your users and groups interact with your presentations, e-learning courses, and all other objects in your Workspaces.

To run a Group Activity Report:

1. Click **Reports** on the toolbar.
2. Click **Group Activity** under the **User & Group Reports** category.
3. Select from the drop-down list the **Group Name** on which you are running the report.
4. Click **Run Report**.



Group Activity Report: Northeast Division Reps

Refresh

Start 09/13/2004 End 09/20/2004 Minimum Viewed 5 %

Date Time		Object Title	Last Name	First Name	Username	Status	Score	Slides Viewed	%
9/20/2004 2:31:28 PM		Pricing Calculator	Anderson	Alexis	aanderson	Complete	--	--	
9/20/2004 2:31:58 PM		Industry Snapshot	Anderson	Alexis	aanderson	Incomplete	--	3/9	
9/20/2004 2:32:20 PM		Link to Partner Site	Anderson	Alexis	aanderson	Complete	--	--	
9/20/2004 2:32:34 PM		Link to Partner Site	Anderson	Alexis	aanderson	Complete	--	--	
9/20/2004 2:32:46 PM		Company Overview	Anderson	Alexis	aanderson	Incomplete	50%	2/10	
9/20/2004 2:48:07 PM		Product Datasheet	Swif	Tiffany	tswif	Complete	--	--	
9/20/2004 2:48:26 PM		Industry Snapshot	Swif	Tiffany	tswif	Incomplete	--	6/9	
9/20/2004 2:48:53 PM		Datasheet Order Form	Yajima	Nat	nyajima	Complete	--	--	
9/20/2004 2:49:08 PM		Company Overview	Yajima	Nat	nyajima	Passed	100%	2/10	
9/20/2004 2:49:26 PM		Link to Partner Site	Yajima	Nat	nyajima	Complete	--	--	

Download

Image 34: The results of a Group Activity Report.

The **Group Activity Report** will show you the following details, representing the activity of a selected group of users:

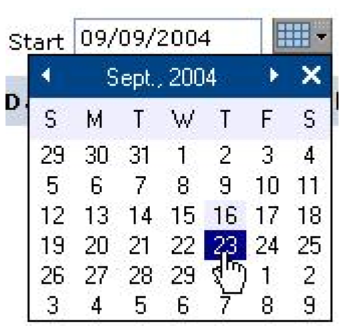
Column Name	Description
Date Time	The date and time the object was last accessed by the user.
Object Title	The title of the object.
Last Name	The user's last name.
First Name	The user's first name.
Username	The username.
Status	The status of the object. If tracking is view-based: • Incomplete • Complete If tracking is quiz-based: • Incomplete • Passed
Score	For quiz-based tracking, the score out of 100.
Slides Viewed	The number of slides viewed out of the total number of slides.
% Viewed	The percentage of slides viewed.
Duration	The time the user has spent viewing presentation.

You will also see an unnamed column to the right of Date Time that displays an icon representing the type of object.

You can filter the User Activity report based on a date range you specify and/or Minimum percent viewed.

To filter the Group Activity Report:

1. Modify the **Start** date of the report either by inputting it manually or clicking the calendar () icon to display a calendar; select a new Start date from the calendar by navigating to the month in question and clicking the date.



2. Modify the **End** date of the report using one of the methods described above.

3. If desired, modify the **Minimum Viewed** percentage. This refers to the percentage of a presentation the user has viewed. For example, if you set this value to 10%, only those presentations that have been at least 10% viewed by the user will be included in the report.

4. Click the **Refresh** button.

You can click certain fields in the report to see additional detail related to that data field.

Clickable Fields in the Group Activity Report

Object Title	Click the name of any **Object Title** to run a report showing all users who have accessed the object. See the section on the Object Activity Report for more details.
Username	Click any **Username** to run a report showing all objects accessed by the user. See the section on the User Activity Report for more details.
Slides Viewed	Click the value in any **Slides Viewed** field to run a report showing the specific slides of the object viewed by the user.

Once you're satisfied with the output, you can **Download** the report as a comma-separated value (CSV) file.

To Download your report:

1. Click the **Download** button at lower right of report.
2. You will see a **File Download** dialog window.
3. Click **Save** to name your report and save it to your local computer.

Group Membership

Articulate Knowledge Portal tracks which users you have assigned to which groups.

To run a Group Membership Report:

1. Click **Reports** on the toolbar.
2. Click **Group Membership** under the **User & Group Reports** category.
3. Select from the drop-down list the **Group Name** on which you are running the report.
4. Click **Run Report**.

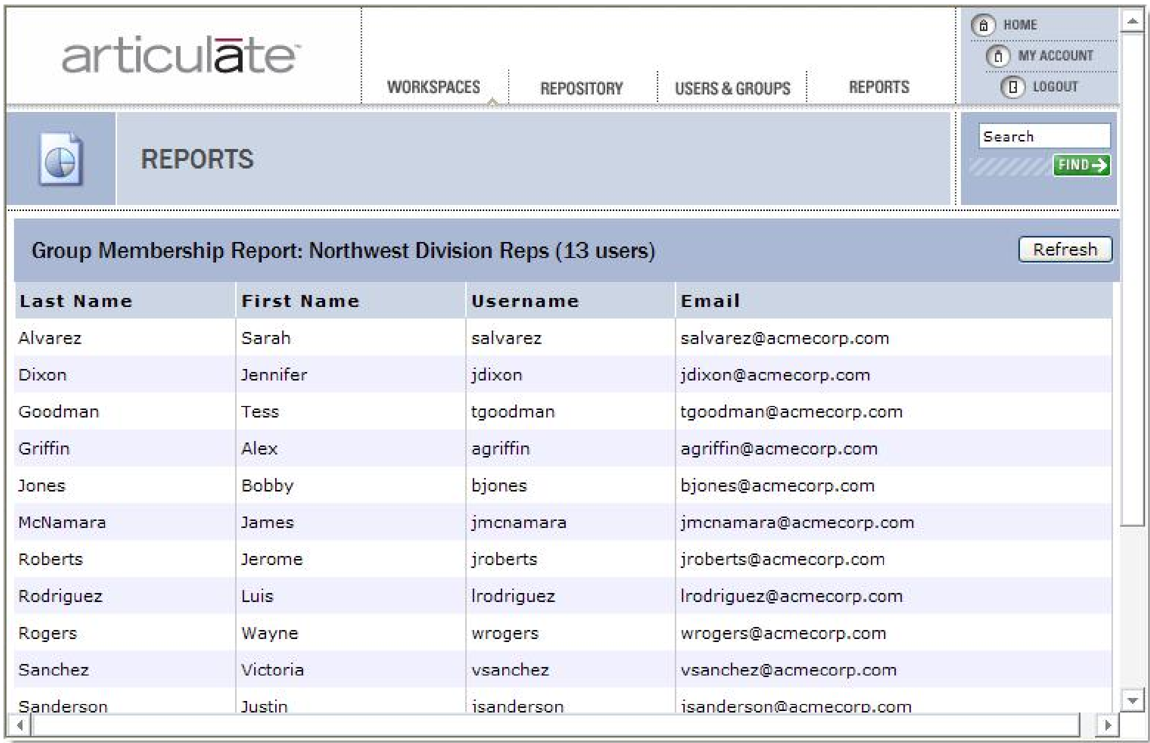


Image 35: The results of a Group Membership Report.

The **Group Membership Report** will show you the following details, representing the members of the selected group of users:

Column Name	Description
Group Name	The name of the group appears in the header of the report.
Number of Users	The number of users in this group appears in parentheses following the Group Name.
Last Name	The user's last name.
First Name	The user's first name.
Username	The username.
Email	The user's email address.

Once you're satisfied with the output, you can **Download** the report as a comma-separated value (CSV) file.

To Download your report:

1. Click the **Download** button at lower right of report.
2. You will see a **File Download** dialogue window.
3. Click **Save** to name your report and save it to your local computer.

User Count

Articulate Knowledge Portal tracks the total number of users and groups, as well as active users.

To run a User Count Report:

1. Click **Reports** on the toolbar.
2. Click **User Count** under the **User & Group Reports** category.
3. Click **Run Report**.

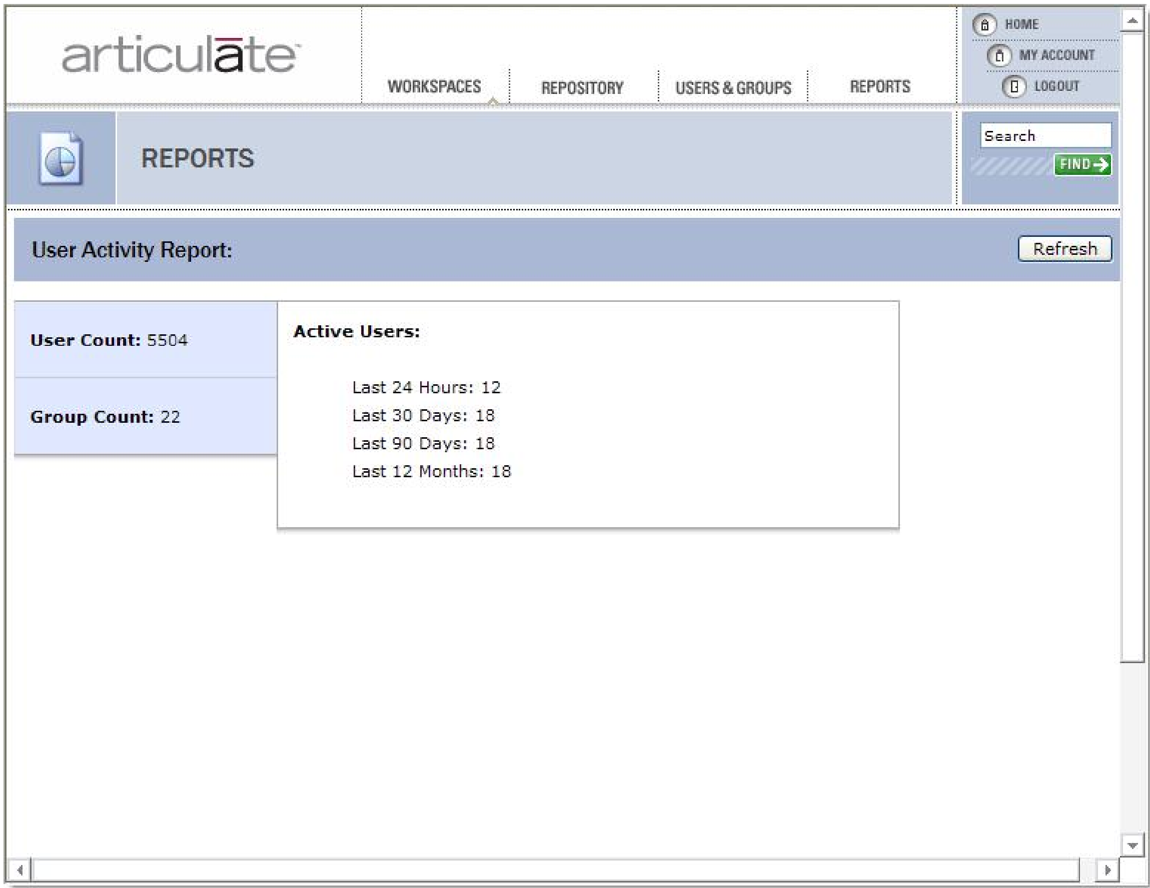


Image 36: The results of a User Count Report.

The **User Count Report** will show you the following details, representing user and group summaries:

Column Name	Description
User Count	The number of users.
Group Count	The number of groups.
Active Users	User activity in the following time ranges: • Last 24 Hours • Last 30 Days • Last 90 Days • Last 12 Months

Tip: You can see the latest data by clicking the **Refresh** button in the upper right-hand corner of this report.

Top Users

Articulate Knowledge Portal tracks how your users interact with your presentations, e-learning courses, and all other objects in your Workspaces. Use the **Top Users** report to see details about your most active users.

To run a Top Users Report:

1. Click **Reports** on the toolbar.
2. Click **Top Users** under the **User & Group Reports** category.
3. Select from the drop-down list the **Group Name** on which you are running the report.
4. Click **Run Report**.

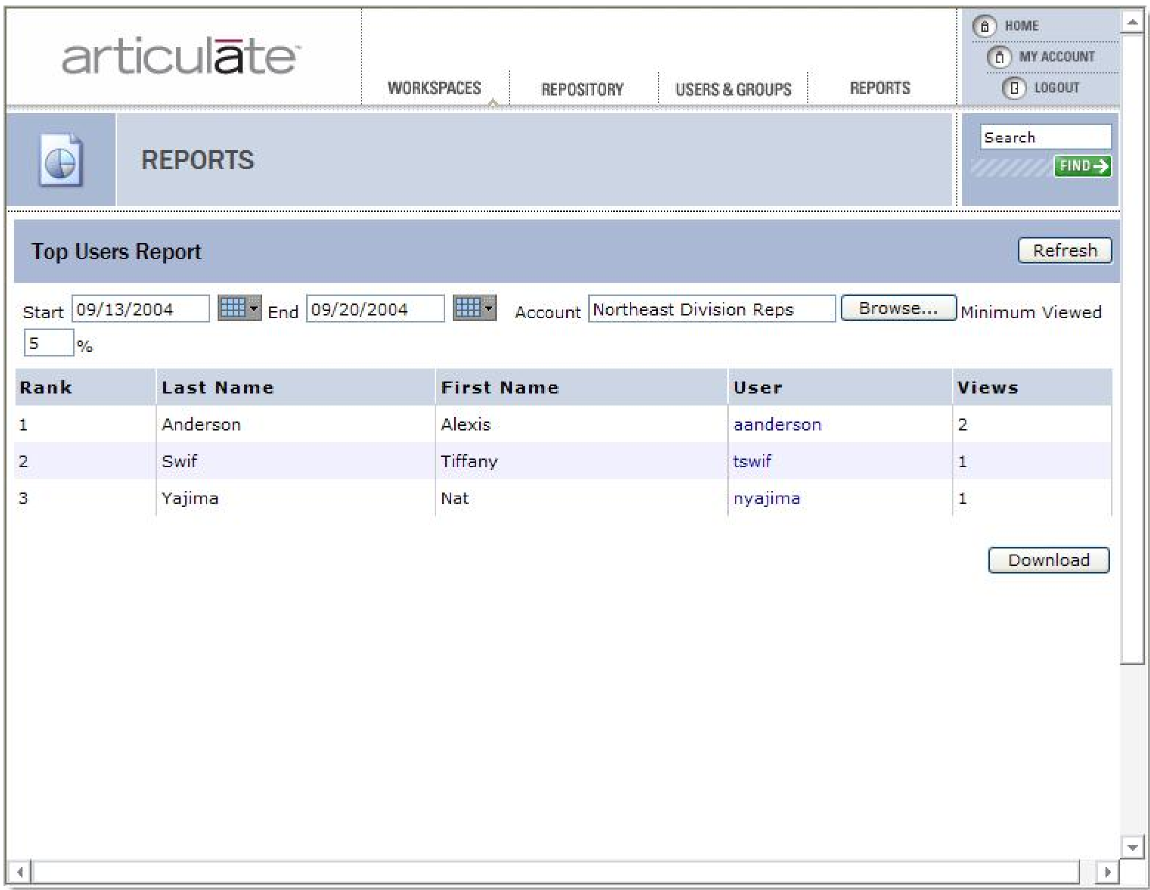


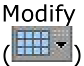
Image 37: The results of a Top Users Report.

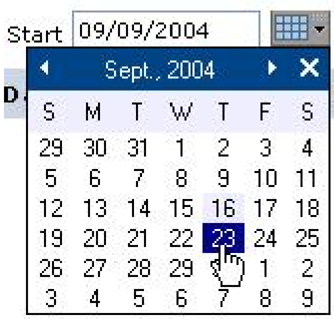
The **Top Users Report** will show you the following details, representing the activity of the selected user:

Column Name	Description
Rank	The rank of this user in terms of overall activity.
Last Name	The user's last name.
First Name	The user's first name.
Username	The username.
Views	The total number of objects this user has viewed.

You can filter the Top Users report based on a date range you specify and/or Minimum percent viewed.

To filter the Top Users Report:

1. Modify the **Start** date of the report either by inputting it manually or clicking the calendar () icon to display a calendar; select a new Start date from the calendar by navigating to the month in question and clicking the date.



2. Modify the **End** date of the report using one of the methods described above.

3. If desired, modify the **Minimum Viewed** percentage. This refers to the percentage of a presentation the user has viewed. For example, if you set this value to 10%, only those presentations that have been at least 10% viewed by the user will be included in the report.

4. Click the **Refresh** button.

You can click certain fields in the report to see additional detail related to that data field.

Clickable Fields in the Top Users Report

Username	Click any **Username** to run a report showing all objects accessed by the user. See the section on the User Activity Report for more details.

Once you're satisfied with the output, you can **Download** the report as a comma-separated value (CSV) file.

To Download your report:

1. Click the **Download** button at lower right of report.
2. You will see a **File Download** dialog window.
3. Click **Save** to name your report and save it to your local computer.

Object Reports

Object Activity

Articulate Knowledge Portal tracks how your users interact with your presentations, e-learning courses, and all other objects in your Workspaces. Use the **Object Activity Report** to view how members of a particular group have interacted with a selected object. All views of the selected object are displayed.

To run an Object Activity Report:

1. Click **Reports** on the toolbar.
2. Click **Object Activity** under the **Object Reports** category.
3. Click **Choose Object** to open the Repository selection window.
4. Navigate to the object on which you would like to run the report and click **Open**.
5. Select from the drop-down list the **Group Name** on which you are running the report.
6. Click **Run Report**.

Tip: If you would like to change your object selection before running the report, click the **Selected** link under **Object**.

Date Time	Last Name	First Name	Username	Status	Score	Slides Viewed	% Viewed	Duratio
9/22/2004 4:22:17 PM	Griffin	Alex	agriffin	Incomplete	--	2/10	20%	00:00:1
9/22/2004 4:23:24 PM	Sanderson	Justin	jsanderson	Incomplete	50%	2/10	20%	00:00:1
9/22/2004 4:23:58 PM	Wilcox	Kathleen	kwilcox	Passed	100%	3/10	30%	00:05:3
9/22/2004 4:29:51 PM	Alvarez	Sarah	salvarez	Passed	100%	3/10	30%	00:00:1
9/22/2004 4:30:18 PM	Rogers	Wayne	wrogers	Incomplete	50%	2/10	20%	00:00:1
9/22/2004 4:30:47 PM	Sanchez	Victoria	vsanchez	Incomplete	--	3/10	30%	00:00:1
9/22/2004 4:31:14 PM	Singh	Sridhar	ssingh	Incomplete	50%	2/10	20%	00:00:1
9/22/2004 4:31:41 PM	McNamara	James	jmcnamara	Passed	100%	2/10	20%	00:00:1
9/22/2004 4:38:10 PM	Griffin	Alex	agriffin	Passed	100%	9/10	90%	00:00:2
9/22/2004 4:41:50 PM	Rodriguez	Luis	lrodriguez	Passed	100%	10/10	100%	00:02:0
9/22/2004 4:44:09 PM	Goodman	Tess	tgoodman	Passed	100%	7/10	70%	00:00:2
9/22/2004 4:44:53 PM	Rogers	Wayne	wrogers	Incomplete	50%	2/10	20%	00:00:1
9/22/2004 4:45:24 PM	Roberts	Jerome	jroberts	Incomplete	50%	7/10	70%	00:00:2

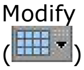
Image 38: The results of an Object Activity Report.

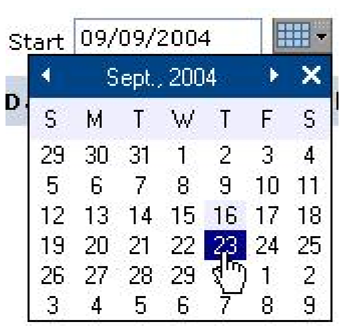
The **Object Activity Report** will show you the following details, representing all user activity for the selected group and object:

Column Name	Description
Date Time	The date and time the object was last accessed by the user.
Last Name	The user's last name.
First Name	The user's first name.
Username	The username.
Status	The status of the object. If tracking is view-based: • Incomplete • Complete If tracking is quiz-based: • Incomplete • Passed
Score	For quiz-based tracking, the score out of 100.
Slides Viewed	The number of slides viewed out of the total number of slides.
% Viewed	The percentage of slides viewed.
Duration	The time the user has spent viewing the presentation.

You can filter the Object Activity report based on a date range you specify and/or Account Name and/or Minimum percent viewed.

To filter the Object Activity Report:

1. Modify the **Start** date of the report either by inputting it manually or clicking the calendar () icon to display a calendar; select a new Start date from the calendar by navigating to the month in question and clicking the date.



2. Modify the **End** date of the report using one of the methods described above.

3. If desired, modify the **Account Name** by typing the username or group name, or by clicking **Browse** and searching for the user or group. The default will be Everyone.

4. If desired, modify the **Minimum Viewed** percentage. This refers to the percentage of a presentation the user has viewed. For example, if you set this value to 10%, only those presentations that have been at least 10% viewed by the user will be included in the report.

5. Click the **Refresh** button.

You can click certain fields in the report to see additional detail related to that data field.

Clickable Fields in the Object Activity Report

Username	Click any **Username** to run a report showing all objects accessed by the user. See the section on the Object Activity Report for more details.
Slides Viewed	Click the value in any **Slides Viewed** field to run a report showing the specific slides of the object viewed by the user.

Once you're satisfied with the output, you can **Download** the report as a comma-separated value (CSV) file.

To Download your report:

1. Click the **Download** button at lower right of report.
2. You will see a **File Download** dialog window.
3. Click **Save** to name your report and save it to your local computer.

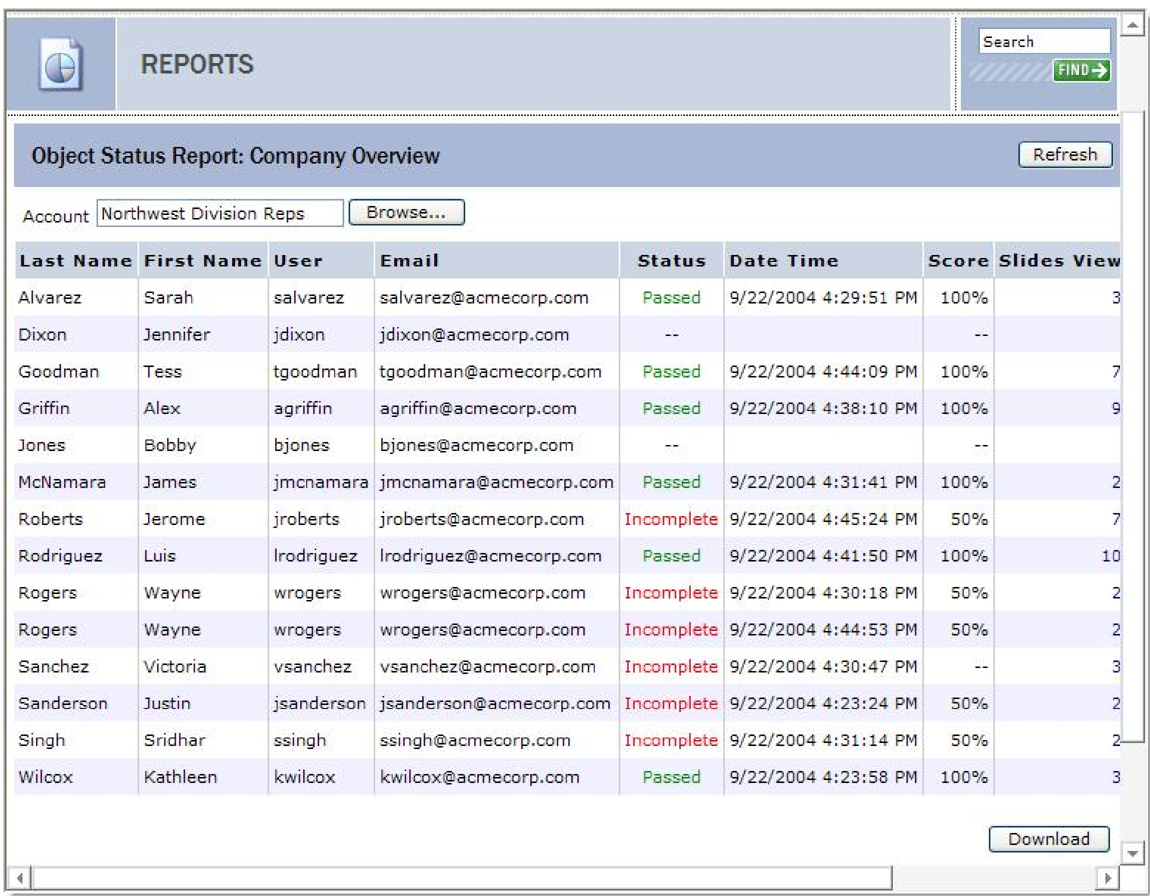
Object Status

Articulate Knowledge Portal tracks how your users interact with your presentations, e-learning courses, and all other objects in your Workspaces. Use the **Object Status Report** to view the current status of an object for members of a particular group. Unlike the Object Activity Report, which shows all user accesses, this report shows only the user's best attempt (highest percent complete or best quiz score).

To run an Object Status Report:

1. Click **Reports** on the toolbar.
2. Click **Object Status** under the **Object Reports** category.
3. Click **Choose Object** to open the Repository selection window.
4. Navigate to the object on which you would like to run the report and click **Open**.
5. Select from the drop-down list the **Group Name** on which you are running the report.
6. Click **Run Report**.

Tip: If you would like to change your object selection before running the report, click the **Selected** link under **Object**.



Last Name	First Name	User	Email	Status	Date Time	Score	Slides View
Alvarez	Sarah	salvarez	salvarez@acmecorp.com	Passed	9/22/2004 4:29:51 PM	100%	3
Dixon	Jennifer	jdixon	jdixon@acmecorp.com	--		--	
Goodman	Tess	tgoodman	tgoodman@acmecorp.com	Passed	9/22/2004 4:44:09 PM	100%	7
Griffin	Alex	agriffin	agriffin@acmecorp.com	Passed	9/22/2004 4:38:10 PM	100%	9
Jones	Bobby	bjones	bjones@acmecorp.com	--		--	
McNamara	James	jmcnamara	jmcnamara@acmecorp.com	Passed	9/22/2004 4:31:41 PM	100%	2
Roberts	Jerome	jroberts	jroberts@acmecorp.com	Incomplete	9/22/2004 4:45:24 PM	50%	7
Rodriguez	Luis	lrodriguez	lrodriguez@acmecorp.com	Passed	9/22/2004 4:41:50 PM	100%	10
Rogers	Wayne	wrogers	wrogers@acmecorp.com	Incomplete	9/22/2004 4:30:18 PM	50%	2
Rogers	Wayne	wrogers	wrogers@acmecorp.com	Incomplete	9/22/2004 4:44:53 PM	50%	2
Sanchez	Victoria	vsanchez	vsanchez@acmecorp.com	Incomplete	9/22/2004 4:30:47 PM	--	3
Sanderson	Justin	jsanderson	jsanderson@acmecorp.com	Incomplete	9/22/2004 4:23:24 PM	50%	2
Singh	Sridhar	ssingh	ssingh@acmecorp.com	Incomplete	9/22/2004 4:31:14 PM	50%	2
Wilcox	Kathleen	kwilcox	kwilcox@acmecorp.com	Passed	9/22/2004 4:23:58 PM	100%	3

Image 39: The results of an Object Status Report.

The **Object Status Report** will show you the following details, representing the status of the selected object and group:

Column Name	Description
Last Name	The user's last name.
First Name	The user's first name.
Username	The username.
Email	The user's email address.
Status	The status of the object. If tracking is view-based: • Incomplete • Complete If tracking is quiz-based: • Incomplete • Passed
Date Time	The date and time the object was last accessed by the user.
Score	For quiz-based tracking, the score out of 100.
Slides Viewed	The number of slides viewed out of the total number of slides.
% Viewed	The percentage of slides viewed.
Duration	The time the user has spent viewing the presentation.

You can filter the Object Report based on Account Name.

To filter the Object Status Report:

1. Modify the **Account Name** by typing the username or group name, or by clicking **Browse** and searching for the user or group. The default will be Everyone.
2. Click the **Refresh** button.

You can click certain fields in the report to see additional detail related to that data field.

Clickable Fields in the Object Status Report

Slides Viewed	Click the value in any **Slides Viewed** field to run a report showing the specific slides of the object viewed by the user.

Once you're satisfied with the output, you can **Download** the report as a comma-separated value (CSV) file.

To Download your report:

1. Click the **Download** button at lower right of report.
2. You will see a **File Download** dialog window.
3. Click **Save** to name your report and save it to your local computer.

Top Objects

Articulate Knowledge Portal tracks how your users interact with your presentations, e-learning courses, and all other objects in your Workspaces. Use the **Top Objects Report** to view a listing of the objects that have been viewed the most by members of each group.

To run a Top Objects Report:

1. Click **Reports** on the toolbar.
2. Click **Top Objects** under the **Object Reports** category.
3. Select from the drop-down list the **Group Name** on which you are running the report.
4. Click **Run Report**.

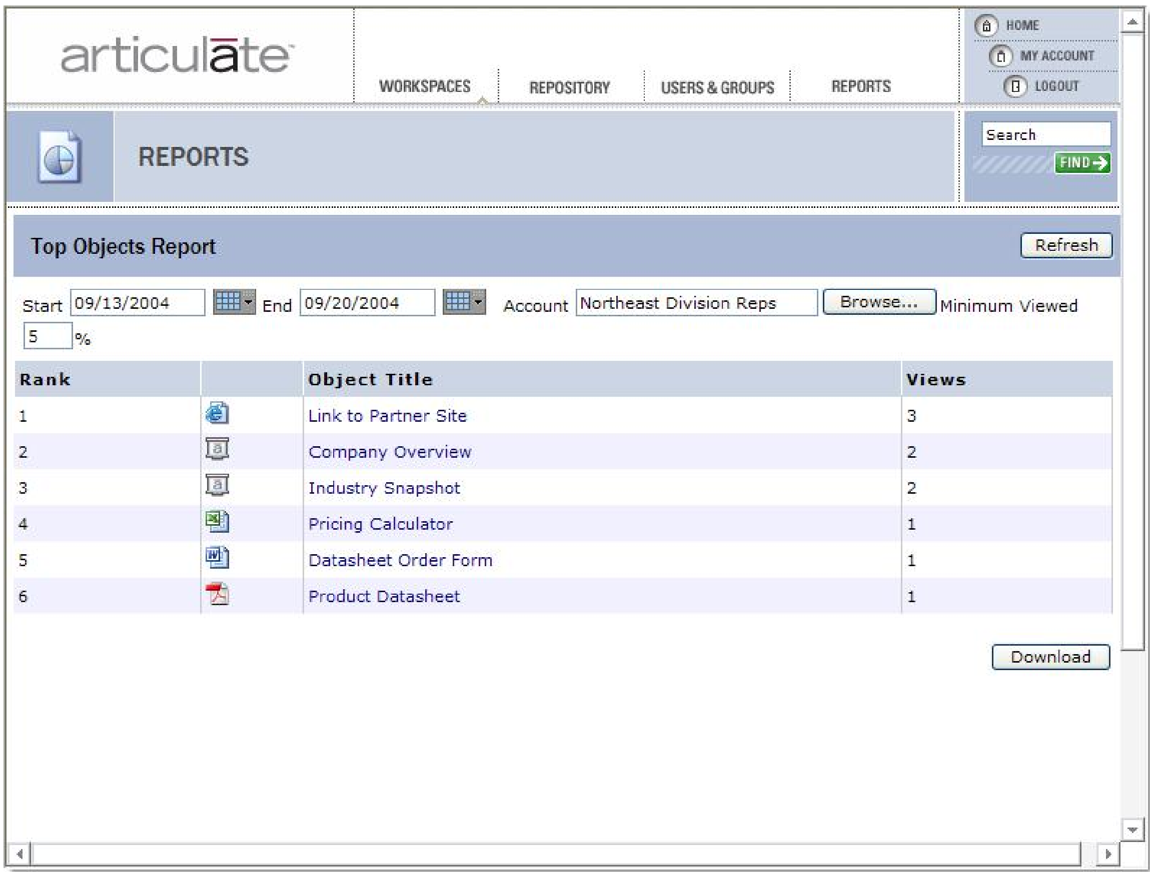


Image 40: The results of a Top Objects Report.

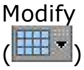
The **Top Objects Report** will show you the following details, representing the most popular objects for the selected group:

Column Name	Description
Rank	The relative rank of this object in terms of how often it has been viewed.
Object Title	The title of the object.
Views	The cumulative number of views for this object by all members of the selected group.

You will also see an unnamed column to the right of Rank that displays an icon representing the type of object.

You can filter the Top Objects report based on a date range you specify and/or Account Name and/or Minimum percent viewed.

To filter the Top Objects Report:

1. Modify the **Start** date of the report either by inputting it manually or clicking the calendar () icon to display a calendar; select a new Start date from the calendar by navigating to the month in question and clicking the date.

2. Modify the **End** date of the report using one of the methods described above.

3. If desired, modify the **Account Name** by typing the username or group name, or by clicking **Browse** and searching for the user or group. The default will be Everyone.

4. If desired, modify the **Minimum Viewed** percentage. This refers to the percentage of a presentation the user has viewed. For example, if you set this value to 10%, only those presentations that have been at least 10% viewed by the user will be included in the report.

5. Click the **Refresh** button.

You can click certain fields in the report to see additional detail related to that data field.

Clickable Fields in the Top Objects Report

Object Title	Click the name of any **Object Title** to run a report showing all users who have accessed the object. See the section on the Object Activity Report for more details.

Once you're satisfied with the output, you can **Download** the report as a comma-separated value (CSV) file.

To Download your report:

1. Click the **Download** button at lower right of report.
2. You will see a **File Download** dialog window.
3. Click **Save** to name your report and save it to your local computer.

Course Reports

Course Status

Articulate Knowledge Portal tracks how your users interact with your presentations, e-learning courses, and all other objects in your Workspaces. Use the **Course Status Report** to view which members of a particular group have completed a selected course.

To run a Course Status Report:

1. Click **Reports** on the toolbar.
2. Click **Course Status** under the **Course Reports** category.
3. Select from the drop-down list the **Course Name** on which you are running the report.
4. Select from the drop-down list the **Group Name** on which you are running the report.
5. Click **Run Report**.


Course Status Report: Rep Fundamentals
Refresh
Account Northwest Division Reps Browse...

Last Name	First Name	User	Email	Completed	Time
Alvarez	Sarah	salvarez	salvarez@acmecorp.com	Completed	9/23/2004 1:58:22 PM
Dixon	Jennifer	jdixon	jdixon@acmecorp.com	Completed	9/23/2004 1:59:22 PM
Goodman	Tess	tgoodman	tgoodman@acmecorp.com	Completed	9/23/2004 1:58:56 PM
Griffin	Alex	agriffin	agriffin@acmecorp.com	Completed	9/23/2004 1:51:01 PM
Jones	Bobby	bjones	bjones@acmecorp.com		
McNamara	James	jmcnamara	jmcnamara@acmecorp.com		
Roberts	Jerome	jroberts	jroberts@acmecorp.com	Completed	9/23/2004 1:59:36 PM
Rodriguez	Luis	lrodriguez	lrodriguez@acmecorp.com		
Rogers	Wayne	wrogers	wrogers@acmecorp.com	Completed	9/23/2004 1:58:40 PM
Sanchez	Victoria	vsanchez	vsanchez@acmecorp.com		
Sanderson	Justin	jsanderson	jsanderson@acmecorp.com	Completed	9/23/2004 1:51:54 PM
Singh	Sridhar	ssingh	ssingh@acmecorp.com		
Wilcox	Kathleen	kwilcox	kwilcox@acmecorp.com		

Download

Image 41: The results of a Course Status Report.

The **Course Status Report** will show you the following details, representing completion status of the selected course for all members of the selected group:

Column Name	Description
Last Name	The user's last name.
First Name	The user's first name.
Username	The username.
Email	The user's email address.
Completed	Whether or not the user has completed the course.
Time	The date and time of completion, if applicable.

You can filter the Course Status Report based on Account Name.

To filter the Course Status Report:

1. Modify the **Account Name** by typing the username or group name, or by clicking **Browse** and searching for the user or group. The default will be Everyone.
2. Click the **Refresh** button.

Once you're satisfied with the output, you can **Download** the report as a comma-separated value (CSV) file.

To Download your report:

1. Click the **Download** button at lower right of report.
2. You will see a **File Download** dialog window.
3. Click **Save** to name your report and save it to your local computer.

Course List

Articulate Knowledge Portal tracks how your users interact with your presentations, e-learning courses, and all other objects in your Workspaces. Use the **Course List Report** to view how many members of a particular group have completed each course.

To run Course List Report:

1. Click **Reports** on the toolbar.
2. Click **Course List** under the **Course Reports** category.
3. Select from the drop-down list the **Group Name** on which you are running the report.
4. Click **Run Report**.

Image 42: The results of a Course List Report.

The **Course List Report** will show you the following details, representing how many members of the selected group have completed each course:

Column Name	Description
Course Title	The title of the course.
Users Completed out of Total	The number of users out of all users in the selected group who have completed the course.

You can filter the Course List Report based on Account Name.

To filter the Course List Report:

1. Modify the **Account Name** by typing the username or group name, or by clicking **Browse** and searching for the user or group. The default will be Everyone.
2. Click the **Refresh** button.

You can click certain fields in the report to see additional detail related to that data field.

Clickable Fields in the Course List Report

Users Completed out of Total	Click any "out of" number to run a report showing the users who have completed the course. See the section on the Course Status Report for more details.

Once you're satisfied with the output, you can **Download** the report as a comma-separated value (CSV) file.

To Download your report:

1. Click the **Download** button at lower right of report.
2. You will see a **File Download** dialog window.
3. Click **Save** to name your report and save it to your local computer.

Site Reports

Activity Dashboard

Articulate Knowledge Portal tracks how your users interact with your presentations, e-learning courses, and all other objects in your Workspaces. Use the **Activity Dashboard Report** to view a graphical summary of account activity.

To run an Activity Dashboard Report:

1. Click **Reports** on the toolbar.
2. Click **Activity Dashboard** under the **Site Reports** category.
3. Select from the drop-down list the **Group Name** on which you are running the report.
4. Click **Run Report**.

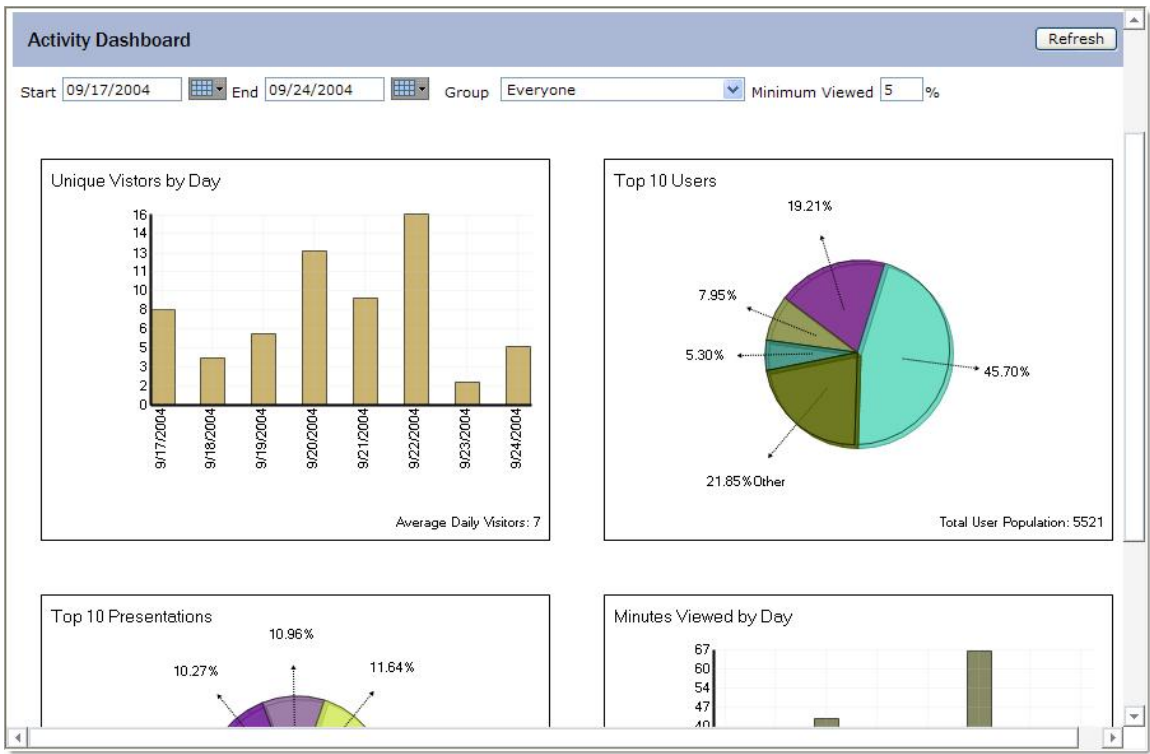


Image 43: The results of an Activity Dashboard Report.

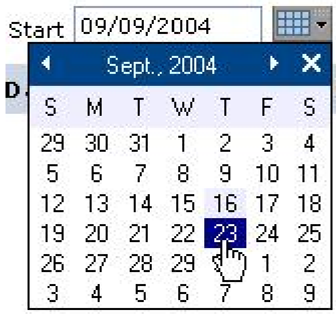
The **Activity Dashboard Report** will show you the following graphical details, representing a summary of activity in your account:

Chart	Description
Unique Visitors by Day/Week	A histogram chart representing the number of unique visitors for each day or week within the time period represented by the **Start** and **End** Dates. If the report is for a time period of four weeks or less, the chart will show **Unique Visitors by Day**. If the report is for a time period of four weeks or greater, the chart will show **Unique Visitors by Week**. Visitors (Usernames) are only counted once per day no matter how often they log in. A count of **Average Daily or Weekly Users** will be given on the bottom right-hand corner of the chart. Hover your mouse over a bar to give the user count for the day or week represented by that bar.
Top 10 Users	A pie chart representing the top 10 users who viewed those presentations that meet the criteria of the report. Each of the 10 users will be reported as a percentage of the total number of views, so that if 100 presentations were viewed, and each user viewed 10 presentations, each user will be reported as having viewed 10%. To see the specific Usernames and number of views, hover your mouse over each section of the chart. The **Total User Population** will be shown in the bottom right-hand corner of the chart.
Top 10 Presentations	A pie chart representing the top 10 presentations viewed that meet the criteria of the report. Each of the 10 presentations will be reported as a percentage of the total number of views, so that if the presentations in total were viewed 100 times, and each individual presentation was viewed 10 times, each presentation will be reported as having been viewed 10%. To see the specific Presentation and number of views, hover your mouse over each section of the chart. The **Total Presentation Views** and **Total Slide Views** will be shown in the bottom right-hand corner of the chart.
Minutes Viewed by Day/Week	A histogram chart representing the number of minutes per day or week presentations were viewed within the time period represented by the **Start** and **End** Dates. If the report is for a time period of four weeks or less, the chart will show **Minutes Viewed by Day**. If the report is for a time period of four weeks or greater, the chart will show **Minutes Viewed by Week**. Hovering your mouse over a bar will give the minute count for the day or week represented by that bar. A count of **Total Minutes Viewed** will be given on the bottom right-hand corner of the chart.

You can filter the Activity Dashboard Report based on a date range you specify and/or Group Name and/or Minimum percent viewed.

To filter the Activity Dashboard Report:

1. Modify the **Start** date of the report either by inputting it manually or clicking the calendar () icon to display a calendar; select a new Start date from the calendar by navigating to the month in question and clicking the date.



2. Modify the **End** date of the report using one of the methods described above.

3. If desired, select from the drop-down list the **Group Name** on which you wish to filter the report. The default will be Everyone.

4. If desired, modify the **Minimum Viewed** percentage. This refers to the percentage of a presentation the user has viewed. For example, if you set this value to 10%, only those presentations that have been at least 10% viewed by the user will be included in the report.

5. Click the **Refresh** button.

Top Search Terms

Articulate Knowledge Portal tracks how your users interact with your presentations, e-learning courses, and all other objects in your Workspaces. Use the **Top Search Terms Report** to view the most popular search terms input by your users. This report does not include search terms used while searching within a presentation.

To run Top Search Terms Report:

1. Click **Reports** on the toolbar.
2. Click **Top Search Terms** under the **Site Reports** category.
3. Click **Run Report**.

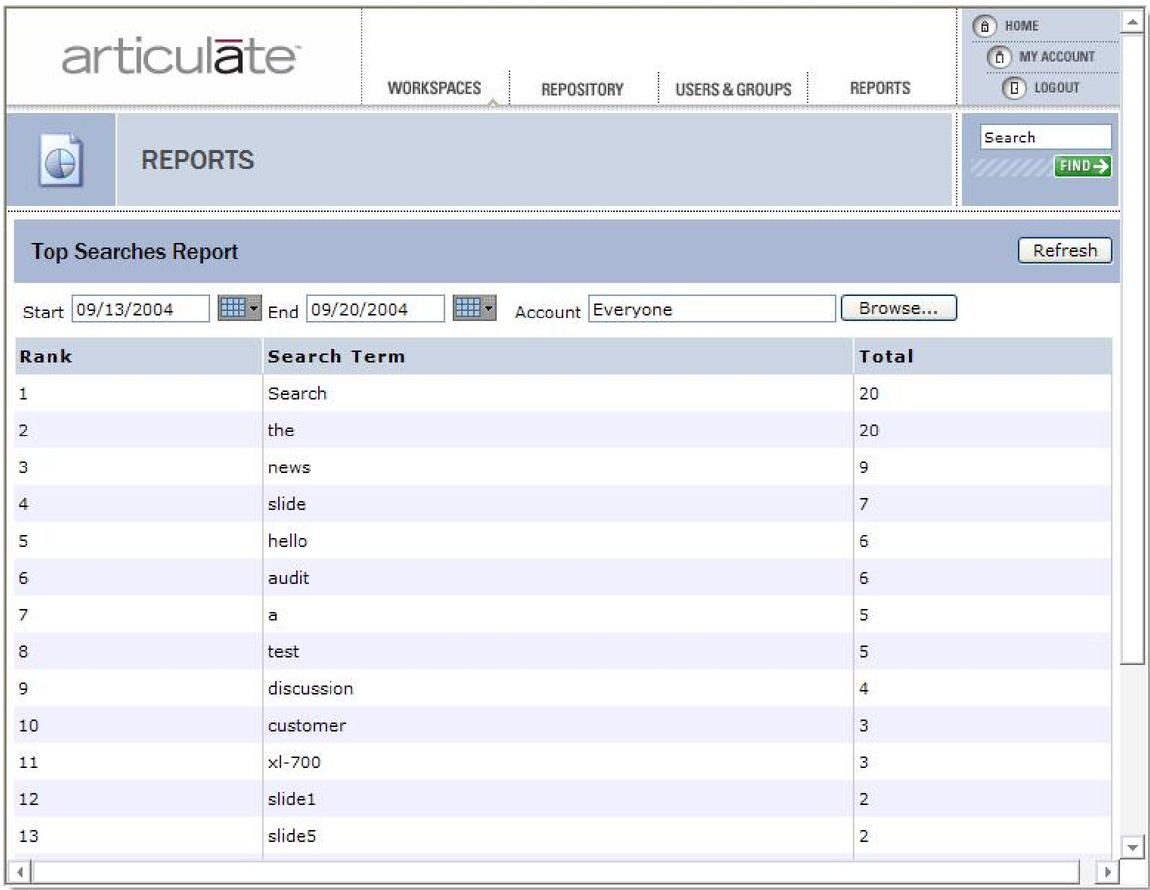


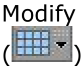
Image 44: The results of Top Search Terms Report.

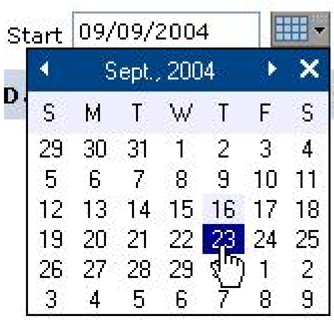
The **Top Search Terms Report** will show you the following details, representing the most popular search terms:

Column Name	Description
Rank	The rank of the search term in terms of overall activity, with a rank of 1 being used to indicate the term most often searched for. By default, .
Search Term	The actual **Search Term** used.
Total	The total number of times a search was performed using the **Search Term**.

You can filter the Top Search Terms Report based on a date range you specify and/or Account Name.

To filter the Top Search Terms Report:

1. Modify the **Start** date of the report either by inputting it manually or clicking the calendar () icon to display a calendar; select a new Start date from the calendar by navigating to the month in question and clicking the date.



2. Modify the **End** date of the report using one of the methods described above.

3. If desired, modify the **Account Name** by typing the username or group name, or by clicking **Browse** and searching for the user or group. The default will be Everyone.

4. Click the **Refresh** button.

Once you're satisfied with the output, you can **Download** the report as a comma-separated value (CSV) file.

To Download your report:

1. Click the **Download** button at lower right of report.
2. You will see a **File Download** dialog window.
3. Click **Save** to name your report and save it to your local computer.

Additional Information

Contact

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Index