

Introduction

LatitudeLearning® LMS streamlines Student and Manager workflows with a responsive, task-oriented user interface (UI), easily explored using a Navigation fly-in menu. This document describes the features of this interface and contrasts it with the features it replaces from the Classic user interface. Transitioning to the responsive UI will require change management, but the benefits are clear and the process of switching itself is very simple. Additionally, organizations using Person-to-Person (Direct) management reporting will gain many benefits from the change. The responsive Student/Manager UI is designed to honor direct manager relationships in features such as My Team, which were not retrofitted to the Classic UI.

Direct Users to the Navigation UI at Login

When you are ready to make the Classic UI less prominent or inaccessible to your users, you need to make some settings changes under **Site Management > LMS Information > LMS Configuration**.

- **Login Landing Page:** Set the first page users see when they log in. If set to Navigation, they will see the icon-based Navigation page. This can be set to any page you wish, because the Navigation page options are now fully available to users if they employ the Navigation Fly-in Menu.
- **Home Page:** Set this to the page to which users should be directed when they click your site logo or the Home icon. This can be any page you wish.

Both of these settings are global LMS settings and cannot be set by organization or position group.

If **Classic Home** page is not specified for either setting, users are forced to use the responsive interface. Only users with Administrative rights (excludes Student and Location Manager roles) have access to elements of the Classic UI for administrative activities via the Administration icon in the LMS Header.

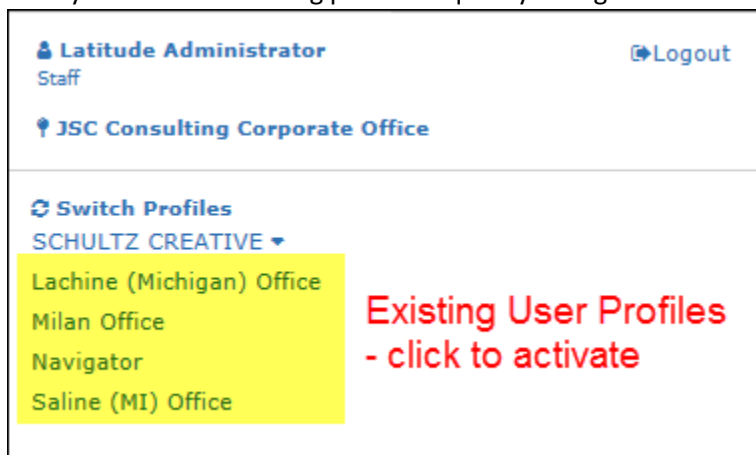
LMS Header Navigation

The LMS Header is always visible regardless of the user interface in use. Use it to navigate back to your established Home page, to the Navigation menu, or to Online Help. It provides Administrative users access to the Administration menu. Users with multiple profiles or with profiles at higher organizational levels can use the header to swiftly change to other profiles to get a perspective from various organizations in their purview.

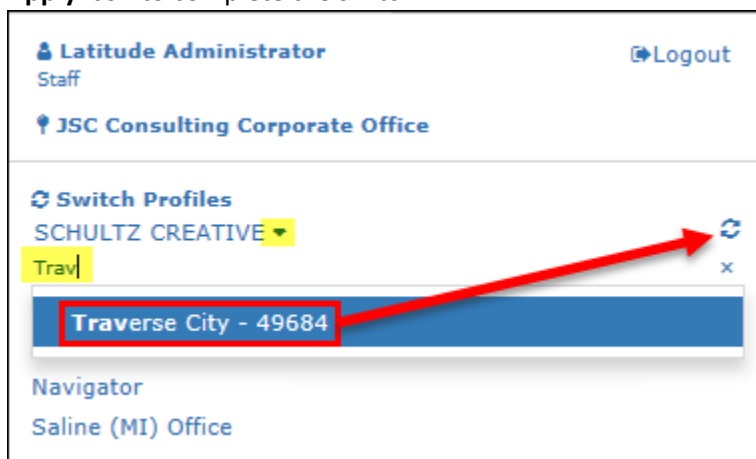


1. Click the **Navigation Menu** at any time to navigate to another page available to the user. Icons such as My Team, Approvals, and Reports will only show for those with the roles and managerial status to view them.
2. Click the **Header Logo** to redirect to the Home Page established by the Portal Administrator. Configure this in **Site Management > LMS Information > LMS Configuration > Home Page**.
3. Click the **Home** icon to redirect to the Home Page established by the Portal Administrator. Uses the same setting noted in item 2.
4. Use **Course Search** to quickly search the course catalog for a course by code, name, or keyword. You can hide this box in **Site Management > LMS Information > LMS Configuration > Header Course Search**.
5. Click the **Administration** icon to access the Classic user interface for access to administrative tasks. This icon only appears for users with some level of Administrative rights, such as Portal Administrators, Administrators, Location Administrators, and Instructors.

6. Use the dropdown arrow next to the user's name to:
 - a. Logout
 - b. Change profiles, for users with more than one available.
--They can click an existing profile to quickly change to it.



--If they hold a profile at a higher level, such as company or business unit, they can switch to any location within that level using a type-ahead search. Use the drop-down arrow next to the upper organization level and start typing the name of the location. Select it from the list and then click the **Apply** icon to complete the switch.















Navigation Fly-In Menu





The Navigation Fly-in Menu and its icon-driven options are the heart of the responsive user interface. This is a breakdown of all the various options and how they map to the Classic user interface. You have control over which icons display and you should note which icons display dynamically based on user managerial status and roles. Most functions will still be available for administrative users even if access is hidden from the Student/Manager interface.







Portal administrators may display or hide icons here: **Administration > Site Management > [Edit Navigation](#)**.


Icons dependent on roles or managerial status will be designated in their description below as **Dynamic**.

Navigation Icon	Description & Usage	Classic UI Equivalent
<p>Account</p> 	<p>Users can maintain some elements of their account. For portals using Two-Factor Authentication, challenge questions are available for edit. If you do not want users to change their own account information, or for SSO- or feed-managed users hide this option. This does not impact user account maintenance for portal administrators.</p>	<p>Classic Home - My Details Tab</p>
<p>Announcements</p> 	<p>Send targeted, ad hoc messages to users.</p> <ul style="list-style-type: none"> • Dynamic - When displayed, this icon only appears for administrative users and those with subordinates. • Functionally the same as the Classic version. <p>Using Announcements</p>	<p>My Learning Center menu > Announcements</p>
<p>Approvals</p> 	<p>Approve <i>User Account Registration</i>, <i>Interest List</i> requests, and <i>Course Enrollment</i> requests. If no LMS actions require manager approval, hide this icon. Approvals are also a permanent option under the My Team page.</p> <ul style="list-style-type: none"> • Dynamic - When displayed, this icon only appears for administrative users and those with subordinates. <p>Processing Approvals</p>	<p>My Learning Center menu > Approvals</p> <p>Classic Home - Approvals Tab</p>
<p>Accreditations</p> 	<p>Displays a user’s Accreditation-based assignments and status. Accreditations are Certifications or Curriculums</p> <ul style="list-style-type: none"> • Hide if your organization does not use Accreditations. <p>Accreditations Page</p>	<p>Classic Home – Certifications Tab</p>
<p>Course Offerings</p> 	<p>Users can search for past or upcoming offerings and if allowed, request to be placed on the interest list or enroll in the session. Hide if you do not use Classroom or Virtual Classroom courses.</p> <p>Locate and Enroll in a Course (see section on enrolling in a classroom course)</p>	<p>My Learning Center menu > Courses > Search Offerings</p>
<p>Course Search</p> 	<p>Allows a user to search for courses available to them in the catalog associated with their organization. Course availability may vary by Business Unit assignment.</p> <p>Hide if you do not want users to select their own coursework. To completely hide it, you would also need to disable the Header Course Search box under Site Management > LMS Information > LMS Configuration > Header Course Search</p> <p>Using Course Search Action Buttons on Course Search</p>	<p>My Learning Center menu > Courses > Search Courses</p>

Navigation Icon	Description & Usage	Classic UI Equivalent
<p>Courses to Complete</p> 	<p>Users see their Required* and in-progress training at a glance, including pending interests. Action options vary by delivery method.</p> <p>A red notification dynamically displays the number of active completion requirements.</p> <p><i>*enable LMS Information setting “Display Next Required Training”</i></p> <p>Use Courses to Complete</p>	<p>Classic Home – main page display of user’s Live Courses, Self-Studies, and Interest List sections. Next Required Training section (if enabled)</p>
<p>Featured Courses</p> 	<p>Dynamic - If enabled, it only displays for users who have courses featured at their locations. If you do not use this function, you can hide the icon.</p> <p>Set Up Featured Courses by Location</p>	<p>Classic Home – Featured Courses section</p>
<p>Manage Users</p> 	<p>Allows some user maintenance tasks to be performed by a Location Administrator or Administrator. Portal administrators can specific allowances via the Edit Navigation page.</p> <p>Dynamic – If enabled, this icon will only display to users with a Location Administrator or Administrator role and will be scoped to the users they are allowed to see via the position hierarchy or person-to-person hierarchy.</p> <p>Delegating User Maintenance to Administrative Users</p>	<p>No equivalent except for portals which purchased Latitude customizations to allow specific types of user maintenance for some roles.</p>
<p>Messages</p> 	<p>The inbox for messages related to user account actions, training-related events, and other system notifications. A red notification counter indicates the number of unread messages in your inbox. The Messages icon in the Header also serves this purpose.</p> <p>Managing Messages</p>	<p>Classic Home – Mail Center section</p>
<p>My Goals</p> 	<p>Displays a user’s individualized training plan, with a detailed list of accreditation- and/or course-related goal assignments. The red notification counter shows how many goals are assigned to the user. Enable if you are using Course Goals or Accreditation Goals.</p> <p>Using My Goals</p>	<p>Classic Home – Goals Tab [does not display Course Goals]</p>
<p>My Learning</p> 	<p>If displayed, this provides all users a learning dashboard showing many elements of their training programs in one quick view. Users can drill down into sections to navigate to full page displays, such as Courses to Complete or their user Account.</p> <p>Portal Administrators can manage what displays on the page, including the channels that are displayed and the page HTML content.</p> <p>Edit the My Learning Page</p> <p>Using the My Learning Page</p>	<p>Some aspects of the Classic Home page.</p>

Navigation Icon	Description & Usage	Classic UI Equivalent
<p>My Team</p> 	<p>My Team provides a powerful one-stop shop for managers to oversee employee/team training and monitor progress.</p> <ul style="list-style-type: none"> • Dynamic - When displayed, this icon only appears for administrative and managerial users • Incorporates features from several legacy pages: <ul style="list-style-type: none"> ○ People: View subordinates and drill down on user details, with quick views of a user’s Courses to Complete, Goals, and Training History. Expand filters to adjust view of users. Scoped to managerial purview. ○ Goals: Manage/track goal progress by user and by team. If you allow it, managers may assign Goals to their employees using +Goals. <i>[Site Management > LMS Information > Goals Configuration > Set Team Goals/Waive Team Goals]</i> ○ Team Accreditations and Skills status overviews ○ Approvals processing for users in their purview. 	<p>Classic Home – Employees tab and its sub-tabs:</p> <ul style="list-style-type: none"> • Location Employees • All Direct Reports • Goals • Department Certification • Department Curriculum • Approvals <p>The +Goal button displays for managers who are allowed to set and waive team goals.</p>
<p>Reports</p> 	<p>Provides access to the Reporting function.</p> <ul style="list-style-type: none"> • Dynamic - If enabled, it only appears for those users who have rights to some level of report access based on their role. • Portal Administrators can write reports and view all custom and Classic reports • Access to custom-written reports and Classic reports is determined by Role. Results for all reports are scoped by managerial purview. Classic reports do not support Person-to-Person reporting relationships. <p>LMS Reporting Tools Classic LMS Reports Report Writer</p>	<p>My Learning Center menu > Reports</p> <p>Leads to the same Reports page in both interfaces.</p>
<p>Resource Library</p> 	<p>Users can search for and view Resources (links, files, pages) that are available to their Business Unit.</p> <p>Manage Resource Documents and Media</p>	<p>My Learning Center menu > Resources > Search Resources</p>
<p>Skill Profile</p> 	<p>Users can see their Curriculum assignments and Skills Profile status.</p> <ul style="list-style-type: none"> • If your organization does not use the Curriculum type of Accreditation, you can hide this icon. 	<p>Classic Home > Curriculum Tab</p>

Navigation Icon	Description & Usage	Classic UI Equivalent
<p>Training Calendar</p> 	<p>Users can display a schedule of upcoming Classroom or Virtual Classroom Offerings and drilldown to enroll.</p> <ul style="list-style-type: none"> • If you do not conduct instructor-led training, you can hide this icon. 	<p>My Learning Center menu > Courses > Training Calendar</p>
<p>Training Schedule</p> 	<ul style="list-style-type: none"> • Dynamic: Only displays for instructors who have been assigned to teach an offering. • For users with an Instructor role, this page displays the instructor’s teaching schedule based on assigned offerings. • If you do not conduct instructor-led training, you can hide this icon. 	<p>Classic Home – Teaching Schedule section</p>
<p>Training History</p> 	<p>The user can view their personal training history for courses and accreditations. Information shown is available for download.</p> <ul style="list-style-type: none"> • Completed: shows all course completions and accreditation achievements in one view. • All Courses: shows all course transcripts in any status • All Accreditations: shows all accreditations in any status <p>Viewing Training History</p>	<p>Classic Home – History Tab</p>
<p>What’s New</p> 	<p>This versatile page shares HTML content with that shown on the Classic Home page. Content can be configured for many purposes such as communications about new training, as a login landing page that links out to other pages or provides instructions, etc.</p> <p>Portal administrators can create/modify the HTML file for this content under Site Management > Edit HTML. They can choose which file displays by updating Site Management > LMS Information > LMS Branding > What’s New content.</p>	<p>Classic Home – Welcome area content controlled by default with the HTML file <i>home_page</i></p>
<p>Chat Support</p> 	<p>**VISIBLE ONLY TO PORTAL ADMINISTRATORS WITH PAID USER-/ENROLLMENT-BASED SUBSCRIPTIONS**</p> <p>Provides access to online chat with Latitude ClientCare Monday-Friday 9:00-6:00 pm ET. For quick questions and conversations. Missed chats become ClientCare help desk tickets.</p>	<p>Also available for the same users by logging into the Customer Self-Service portal.</p>
<p>Customer Portal</p> 	<p>**VISIBLE ONLY TO PORTAL ADMINISTRATORS WITH PAID USER-/ENROLLMENT-BASED SUBSCRIPTIONS**</p> <p>Provides access to Latitude’s Zoho Help Desk for direct submission of tickets, management of previous tickets, and online chat. Request an invitation by emailing Support@LatitudeLearning.com.</p>	<p>Also available by direct URL for current customer portal members.</p>

Navigation Icon	Description & Usage	Classic UI Equivalent
<p data-bbox="207 279 313 306">Support</p> 	<p data-bbox="394 279 1101 338">**VISIBLE ONLY TO PORTAL ADMINISTRATORS WITH PAID USER-/ENROLLMENT-BASED SUBSCRIPTIONS**</p> <p data-bbox="394 348 1166 449">Provides a link to our ClientCare support website, which contains a number of documents and videos on how to use the LMS and its many features.</p>	<p data-bbox="1206 279 1406 338">Also available by direct URL:</p> <p data-bbox="1206 348 1442 449">www.latitudelarning.com/community/lms-support</p>

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- [Updates and Release Notes](#): As we update or add features in our regular bi-weekly production releases, you can keep track of changes at any time by visiting this page.
- [R&D Roadmap](#): See in-progress and planned enhancements, vote on proposed enhancements, or suggest an idea for our R&D team.

View all of our online documentation: [Support Documentation](#).