**sumtotal.**

**SumTotal Learning Management**

# Skillsoft PES Integration User Guide

**Version 20.1**

**sumtotal.**

# CONTENTS

sumtotal.

# Legal Notice

# Introduction

Skillsoft's Percipio Experience Services (PES) enables the delivery of Percipio-based content, services, and experiences via SumTotal Learning Management. Training is immersive and updated regularly, providing an engaging experience for your learners.

If your company uses Skillsoft Percipio, you can integrate your materials into SumTotal Learning Management so your learners can access all their training in one place. Learners can access synchronized Skillsoft PES content from both a web browser and the Mobile app.

- *For more on Skillsoft PES, talk to your Skillsoft account representative.*

**About This Guide**

This guide provides information on the Skillsoft PES integration process. It contains instructions for administrators on how to configure and manage integrated activities, as well as an overview for how learners can access and complete the materials.

It is intended for users who are familiar with Skillsoft PES functionality and SumTotal Learning Management, and are aware of basic terminology (such as "channels" or "learning activities") and functions for each system. While we have included a **Skillsoft PES Quick Reference** (on page 63) as an appendix, the focus of this guide is on how the two products interact and how administrators and users can best utilize the integrated features.

If you require additional instructions or information on either Skillsoft or SumTotal products, please refer to either the Skillsoft Product Knowledge Base or the SumTotal Connect Documentation, respectively.

> *Important: This guide is for Skillsoft PES (Percipio Experience Services) only. If you're looking to integrate with Skillsoft OLSA (Open Learning Service Archives), see the SumTotal Learning Management Skillsoft OLSA Integration User Guide.*
>
> *In general, we do NOT recommend integrating with both Skillsoft OLSA and Skillsoft PES at once, as it will lead to duplicate activities in Learning Management. However, there may be circumstances (such as if your company uses compliance) where you need to integrate with both simultaneously. If you're using OLSA and want to use PES, please contact professional services for assistance.*

# Contact SumTotal

## See More in Online User Assistance

Want more intuitive, searchable, and feature-laden documentation? Check out our online User Assistance! Log into your SumTotal site and click the Help icon (  ) in the upper-right hand corner to access fully integrated help and administrator video walkthroughs.

## Find Additional Help

**SumTotal Connect**

Are you Connected? On SumTotal Systems Connect, you can access What's New guides, administration guides, free training, discussion forums, and more.

**Login** (**http://community.sumtotalsystems.com/p/us/in**) or **request** (**https://community.sumtotalsystems.com/p/cm/ld/fid=102**) your account today! Your new request is processed within 48 business hours.

**Customer Support**

If you need additional help, please contact your system or learning administrator. If you're not sure who this is, check your **News** page to see if contact information is listed there, or ask your supervisor or IT contact, as learning administrators are often a part of the IT department.

# Connect with Skillsoft

**Review the Percipio Release Notes**

What to stay up-to-speed on improvements to Skillsoft PES and Percipio? Check out the **Percipio Release Notes** (**https://documentation.skillsoft.com/en_us/percipio/Content/C_Release_Notes/percipio_release_notes.htm**) for updates.

**Contact Your Support Representative**

For questions concerning Skillsoft PES functionality on the Percipio side, please reach out to your Skillsoft Client Success Manager (CSM).

**Subscribe to Notifications**

Skillsoft PES occasionally goes down for maintenance. Please reach out to your Skillsoft CSM and get subscribed to notifications about Percipio's maintenance window so you know when the servers will be down and content will not be accessible.

sumtotal®

# Before You Begin

> *Best Practice: To ensure the integration goes smoothly, we strongly recommend working with professional services to set up your Skillsoft PES integration.*

**Before You Begin:**

- Identify the Skillsoft PES collections you want to have in Learning Management and work with your Skillsoft account manager to help you obtain the licenses.

- Have your Skillsoft account representative provide you with your API Token and Organization UUID. You'll need these to configure the integration in SumTotal.

- Contact your SumTotal support representative to configure the Learning Record Store (LRS) and generate an LRS token. They will need to share this with Skillsoft to make sure the token is the same on each site. LRS configuration is mandatory for tracking Skillsoft PES content in Learning Management.

- (Recommended) Create a "parent" Library topic to contain all your imported Skillsoft PES content. If you need a refresher course on how to create a topic, see the *SumTotal Learning Management System Administrator Guide.*

- Make sure you have the **CanConfigureSystem > Content Integration Settings** Learning Management security permission enabled for the administrator(s) who will be configuring Skillsoft PES at the domain level.

  - ▸ *For more on managing permissions, see the SumTotal Learning Management Security Roles Configuration Guide.*

- **On-Premised Clients only**: The On-Premise SumTotal Suite must be accessible over public internet in order to access the Skillsoft PES integration solution. If necessary, whitelist PES host address as well.

> *CFR Auditing users only: Make sure you read through the* **Considerations for CFR Auditing Clients** *(on page 20) before configuring your integration.*

# Understanding Skillsoft PES Integration

The following chart details the Skillsoft PES objects that get synchronized and imported into Learning Management. Only content licensed to your company synchronizes with Learning Management.

When you activate Skillsoft PES integration, you can set the data sync between Skillsoft PES and Learning Management to occur automatically and specify how often it occurs (we recommended once per day). In other words, if any of the below objects change in Skillsoft PES (for example, someone creates new

content, edits a channel, or a license pool expires), Learning Management will update to reflect those changes.

We'll go over the process for configuring the integration and scheduling your sync in the next section.

> *Tip: While we recommend setting an automatic sync schedule, you can also manually synchronize if you need to implement your changes sooner. See **Manage Skillsoft PES from the Content Integrations Page** (on page 29) for instructions.*

| Skillsoft PES Object | Mapped to Learning Management Object | Considerations |
|---|---|---|
| Area | Library topic | Syncing areas and subjects as Learning Management Library topics and subtopics is optional. You can choose to do so during the configuration process.<br><br>When you integrate, you can also select a Library parent topic in Learning Management that all Skillsoft PES areas and subjects (topics and subtopics) will go under. For example, you might create a topic called "Skillsoft PES Training" and make that the parent topic for all areas and subjects.<br><br>See **Integrate with Skillsoft PES** (on page 22) for details. |
| Subject | Library subtopic | |
| Channel | Bundle | Associated activities within imported bundles maintain the same order that they have in Skillsoft PES. This is not editable from Learning Management, as Associated Activities are not visible from the Staging Editor.<br><br>For more on handling imported bundles, see **Working with Bundles (Imported Channels)** (on page 40). |
| Content | Activity | Skillsoft PES activities are imported as tincan.xml files. This means they're xAPI-supported.<br><br>Learning Management imports the following types of Skillsoft PES activities:<br><br>• **Featured** content: Display as activities within bundles (imported channels).<br><br>• **Additional** content: Display as standalone activities (not in bundles).<br><br>• **Retired** content: Displays on the Learning |

sumtotal®

| Skillsoft PES Object | Mapped to Learning Management Object | Considerations |
|---|---|---|
| | | Management **Activity Management** page but is not associated with any audiences. We recommend inactivating these activities and managing the roster manually. Please reach out to your Skillsoft account representative to get registered for updates on retired content. |
| Asset Bin: Course Book Audio Book Book Summary Audio Book Summary TestPrep Practice Lab PES Content (default)* | Activity Type (select one for each asset bin) | The content you import depends on the content you licensed in Percipio. For example, TestPrep and Practice Lab are not automatically available to all clients. For more information, contact your Skillsoft account representative<br><br>*Note*: TestPrep and Practice Lab content are not available on the Mobile app because Percipio does not support them on mobile.<br><br>You need to select the mapped activity types. For example, you could use the existing "Course" activity type, or you might want to create a new activity type, "Skillsoft PES Activity," and use that instead.<br><br>See **Integrate with Skillsoft PES** (on page 22) for details. |
| Videos (micro-learning) | Video | Many Skillsoft PES courses are divided into digestible "chunks" called micro-learning videos. These are not individual activities, but instead parts of an imported course.<br><br>When you integrate, you can decide if you want to import micro videos. See **Integrate with Skillsoft PES** (on page 22) for details.<br><br>For more on how micro videos behave in Learning Management, see **Understanding Micro Videos** (on page 42). |

| Skillsoft PES Object | Mapped to Learning Management Object | Considerations |
|---|---|---|
| Modality: Watch Read Listen Practice | Modality Filter: Watch Read Listen Practice | The **Practice** modality is not automatically enabled, but you can do so from the **Modality Filters** page. This is useful if you're importing Practice Lab and/or TestPrep content, as they both use the Practice modality filter. See "Configure Metadata" in the *SumTotal Learning Management Training Administrator Guide* for more on **Modality Filters**. |
| License Pool | License Pool | License pools are automatically imported into Learning Management and maintain their activity associations. However, you must associate them with Learning Management audiences manually. If you don't, your learners can't access the imported activities. See **Associate Skillsoft PES License Pools to Learning Management Audiences** (on page 32) for more on licenses, license pools, and how to use them in Learning Management. |

*Depending on your company's licenses with Percipio, the **PES Content (Default)** bin may include Aspire Journeys and/or Live Events.*

**Note**: *All Skillsoft PES activities except TestPrep and Practice Labs are also available on Mobile.*

In addition, Learning Management also imports the following data for Skillsoft PES materials:

• **Areas**:

| Skillsoft PES Area Parameter | Mapped to Learning Management Library Topic Property |
|---|---|
| Title | Topic Name |
| Description | Description |
| imagePath | Topic Image |
| Subject IDs associated with the area | Subtopics |

- **Subjects**:

| Skillsoft PES Subject Parameter | Mapped to Learning Management Library Topic Property |
|---|---|
| Title | Topic Name |
| Description | Description |
| imagePath | Topic Image |
| Name of the Area ID to which it belongs | Parent Topic |
| Channel IDs associated with the subject | Activities |

- **Channels**:

| Skillsoft PES Channel Dimension | Mapped to Learning Management Bundle Property |
|---|---|
| Title | Activity Name |
| Name | Activity Code |
| Description | Activity Description |
| Image Path* | Activity Image URL |
| FilterValues(text) | Dimension Values (Name)** |

*While unlikely, if a channel doesn't have an image, we'll use the default delivery image for bundles when viewing the channel in Learning Management (such as from Enterprise Search or the Library). The default image won't display on the channel page itself.*

- **Content**:

| Skillsoft PES Content Data | Mapped to Learning Management Activity Property |
|---|---|
| Activity Id | ActivityID<br>Activity Code |
| Activity Name | Activity Name |
| Activity Description | Activity Description |

| Skillsoft PES Content Data | Mapped to Learning Management Activity Property |
| --- | --- |
| Activity ImageUrl* | Image by URL |
| Modality | Modality Filter |
| Duration** | Estimated Duration |
| Language | Language |

*While unlikely, if an activity doesn't have an image, we'll use the default delivery image for its activity type instead.*

**Not all Skillsoft PES content has a duration listed (for examples, books do not have durations). In these cases, the Estimated Duration field is blank.*

Learning Management also imports the following Skillsoft PES content data as search keywords:

- Author
- Expertise - Technology
- Publisher

So, for example, if a learner enters a publisher's name in Enterprise Search, Skillsoft PES content related to that publisher will display. Data imported as keywords is not editable in Learning Management.

- **Micro-Learning Videos**

If the content is a course that contains micro-learning videos, Learning Management also imports the following data for each micro video:

| Skillsoft PES Content Data | Mapped to Micro-Learning Property |
| --- | --- |
| ID | Code |
| CourseID | CourseId |
| Title | Name |
| Description | Description |
| imageURL | Image URL |
| Modalities | Modal Filters |

| Skillsoft PES Content Data | Mapped to Micro-Learning Property |
|---|---|
| Duration | MicroLearning Duration |
| Instructors | MicroLearning Additional Properties - Instructors |
| technologyVersion | MicroLearning Additional Properties - TechnologyVersion |
| expertiseLevel | MicroLearning Additional Properties – ExpertiseLevel |

# Working with Multiple Languages

Percipio supports English, French, German, and Spanish. The synchronization process imports activities in all languages that you have a license for in Skillsoft PES (Percipio). If you have licenses for multiple languages, keep the following points in mind.

> *Note: Any time we mention the "user's preferred language," we're referring to the **Locale** selected on the **Preferences** tab of their SumTotal Profile. For more on setting a preferred language, see the SumTotal Core Platform Administrator Guide.*

- **Content** (such as courses and books) imported as learning activities:
  - ▸ In Percipio, if the same content is available in multiple languages, it displays as separate items (with different IDs). The sync reflects this, meaning you'll import a different activity for each language.

    For example, if you have licenses for a book in three languages, then there will be three separate activities with unique activity IDs imported into SumTotal.
  - ▸ Languages configured in SumTotal have no effect on the language of the imported Skillsoft PES activities. It all depends on your Percipio licenses.

    For example, if you have a Percipio license for French content, that content will import and display in SumTotal even if you don't have French configured in SumTotal.
  - ▸ Any learner with access to an activity can launch it. So, if you make a Spanish activity available to a learner whose preferred language is English, they can still find and launch the Spanish-language activity.

    Remember that you can use license pools to limit the activities each learner can access. See **Associate Skillsoft PES License Pools to Learning Management Audiences** (on page 32) for instructions.

- **Channels** imported as bundles:
  - ▸ From pages within SumTotal, such as search results or the Library, the name and description automatically display in the user's preferred language. If you do not have a

Skillsoft PES license for the user's preferred language, the channel's details display in English.

  ▶ The language on the channel page itself is based on the browser language, not the preferred language. This is the because the channel page comes directly from Percipio, which uses the browser language to determine display language. Only content available in the browser language displays in the channel. If none of the content is available in the browser language, it displays in English.

- **Areas and Subjects** imported as Library topics automatically display in the user's preferred language. If you do not have a Skillsoft PES license for the user's preferred language, the topics display in English.

# Syncing the Library

During the integration setup (described later in this guide), you have the option to sync and display Skillsoft PES content in the SumTotal Library. However, the hierarchies and structures of the Skillsoft Percipio library and SumTotal Learning Management Library behave differently, so they look a bit different.

These differences are mostly cosmetic and don't significantly impact the content itself. That said, if you're interested in making imported Skillsoft PES content available in the Learning Management Library, then you should be aware of these differences as well as how the Learning Management **Library Synchronization Settings** on the **Content Integrations page** (on page 22) affect imported content.

> *Tip: As with the rest of the sync process, we recommend working with you SumTotal support representative to discuss how best to set up your Library structure.*

**LIBRARY SYNCHRONIZATION SETTINGS**

☑ Enable topic hierarchy creation

**Parent Topic**

| Skillsoft PES | BROWSE |

**Library Content**

In Percipio, only channels (imported as "bundles") and Aspire Journeys are mapped to areas and subjects. Other individual activities (such as courses or books) are not included. Channels may be mapped to more than one area or subject, meaning they could appear in multiple locations in the library.

sumtotal.

Additionally, some areas may have subjects with the same name but contain different channels. For example, two areas about different software (such as "Cisco" and "Google") may have a subject called "Developer," which contains channels designed for developers working with that specific software.

SumTotal Learning Management follows these conventions. If you choose to synchronize with the Library, only bundles (imported channels) and Aspire Journeys display in the Library. If you **Enable topic hierarchy creation**, then bundles Aspire Journeys display under the same area or subject (topic or subtopic) name(s) as they did in Percipio.

So, for example, if in Percipio you have an "Accountability" channel in the "Leadership Essentials" subject, then it displays in Learning Management as the "Accountability" bundle within the "Leadership Essentials" subtopic. The structure and names are imported automatically and are not editable.



In Learning Management, you also need to select a **Parent Topic** to determine where in the Learning Management Library hierarchy the Skillsoft PES imported topics and subtopics (areas and subjects) display. For example, you could create a new topic called "Skillsoft PES" and make it the **Parent Topic**. When users expand this topic, they see all the Skillsoft PES areas as topics and could then expand those to see the Skillsoft PES subjects as subtopics, as shown below:

**Library Structure**

In Percipio, bundles (imported channels) are the third level of the library.

In Learning Management, the levels depend on the **Library Synchronization Settings** that you configure from the **Content Integrations page** (on page 22).



These two settings interact with one another and affect the Learning Management Skillsoft PES Library structure, as described in the chart below.

| Library Synchronization Setting | | Effect on Imported Content | |
|---|---|---|---|
| Enable topic hierarchy creation | Parent Topic | Areas and Subjects | Skillsoft PES Channels and Aspire Journeys* |
| Selected | None | Do not display in the Learning Management Library. | Do not display in the Learning Management Library. |
| Cleared | None | | |
| Selected | Root ("Topics") | Display as top-level Library topics and subtopics. In other words, you'll see the areas as topics as soon as you open the Library. You can then expand the topics (areas) to see the subtopics (subjects). | Display as soon as you open the Library and in all relevant topics and/or subtopics. |
| Cleared | Root ("Topics") | Do not display in the Learning Management Library. | Display as soon as you open the Library, but not under any topics or subtopics. |
| Selected | Custom Topic (such as "Skillsoft PES") | Display within the custom topic as subtopics and sub-subtopics. In other words, you need to expand the custom topic to see the list of imported areas. | Display in the custom topic and in all relevant topics and/or subtopics. |
| Cleared | Custom Topic (such as "Skillsoft PES") | Do not display in the Learning Management Library. | All channels display under the custom topic. |

*This chart explains what happens automatically when you sync Skillsoft PES content. You can also manually associate imported Skillsoft content with Learning Management Library topics. Keep reading for considerations on this process.*

**Manually Associating Imported Content with SumTotal Topics**

sumtotal®

If you decide to manually associate imported Skillsoft PES content with SumTotal Library topics, **use caution**. Skillsoft PES activities (that is, any content other than channels/bundles) are frequently added or removed (made obsolete), so you'll need to regularly check on newly imported activities and associate them with topics to make sure your Library stays up-to-date.

Remember that you can create and update topics from the **Manage Library** page. If you need a refresher course on managing topics, see the *SumTotal Learning Management System Administrator Guide*.

> *Tip: You cannot associate micro videos with Library topics, but you can have them display in Enterprise Search. See* **Understanding Micro Videos** *(on page 42) for more.*

**Best Practices for Managing the Synchronized Library**

If you don't use the Library or don't want to make Skillsoft PES content available in the Library, that's perfectly fine. Just leave the **Parent Topic** blank when setting up your integration.

If you do want to make Skillsoft PES content available in the Library, here's what we recommend:

- Since you can't modify the area and subject hierarchy or names in Learning Management, only select **Enable topic hierarchy creation** if you're happy with the way Skillsoft PES content displays in Percipio. Otherwise, leave this checkbox blank.

- Regardless of whether you enabled topic hierarchy creation, you should create a custom topic (for example, "Skillsoft PES") and select it as the **Parent Topic** during the configuration process. This way, imported Skillsoft PES bundles automatically display in the Library and learners can quickly find them all in one place.

- Organize your custom **Parent Topic** directly below the Root Topic. In other words, don't make it the subtopic of any other topics.

  This makes it easier for learners to quickly spot the topic when they open the Library. If you enabled topic hierarchy creation, this also allows learners to choose from all imported areas and subjects when customizing their interests on the **My Interests** and **Recommended Activities** widgets. See **Manage Interests** (on page 58) for more on customizing these widgets.

- If you decide to manually associate imported content with SumTotal Library topics:

  ▶ Schedule a regular (such as weekly) check to ensure all newly imported activities get associated with topics.

  ▶ If you create new topics to sub-divide the imported bundles, organize them under your custom **Parent Topic**.

- ▶ Follow the same best practices you would when working with other Library topics. See the *SumTotal Learning Management System Administrator Guide* for a refresher course on this process.

- If you selected **Enable topic hierarchy creation**, imported Skillsoft PES topics may have identical names to existing topics in your Library (for example, "Certifications"). This may cause confusion, especially if your Skillsoft PES activities aren't in their own unique parent topic. Since imported Skillsoft PES topics are not editable, you should update the names of your Learning Management topics to avoid duplicates.

# Working in Staging Versus Production Environments

You may want to integrate with Skillsoft PES in your stage environment to make sure everything works as expected before activating the integration in production. You can synchronize with Skillsoft PES in your stage and production environment simultaneously, but keep the following in mind:

- **In stage, we recommend performing one manual sync** rather than turning on the scheduled sync. However, if you do set up a scheduled sync, once you've configured the production environment, remember to turn off the sync in the stage environment so there's only one full sync running on your system.

- **Launching an activity always consumes a license**, regardless of whether you're launching it from production or stage.

- **Activity progress does not get tracked in stage**. This means that, if you log in and launch an activity in stage, Percipio does **not** track its progress for the logged-in username or carry this progress into the production environment. If you complete an activity in stage and then access that activity in production from the same username, Percipio treats it like you're launching it for the first time.

  *Important*: *If you're testing a Skillsoft PES course launch in stage, you must limit it to a small group of test users. Create a test user account on the stage site to launch the courses so the progress doesn't interfere with Production usage.*

- There is **no data regularly migrated from stage to production**. If needed, SumTotal can perform a production-over-stage refresh if you latterly want to replace one site completely with an image of the other site. However, you will lose production data if you do this, so it's not recommended. Production data does regularly replace stage data to ensure the stage environment is accurate.

  In other words, any changes to Skillsoft PES integration in the stage environment won't affect production, but changes in production will affect stage during the routine refresh.

For more on working in stage or understanding licenses, please talk to professional services.

# Considerations for CFR Auditing Clients

If you use CFR Auditing for compliance, you can run audit reports on Skillsoft PES imported content. Before you do, though, there are some important points to consider:

- SumTotal does not track activities completed outside of the SumTotal system. In other words, if a user launches and completes Skillsoft PES activities in Percipio, that completion is only recorded in Percipio. If your learners have launched and completed activities in both Percipio and SumTotal Learning Management, then you should perform any audits on Skillsoft PES content through Percipio. Please talk to your Skillsoft account representative for assistance.

- There is no automatic method for distinguishing Skillsoft PES content from other kinds of content on the **Audit change report**.

    If you need to do so, then during the integration setup, you must enter unique **prefixes** and/or **suffixes** for imported Skillsoft PES **activity codes**. You can then filter your audit report based on the activity code prefix or suffix.

> *Tip: It's also a good idea to set up your Skillsoft PES sync in a separate, unique domain, so the imported activities have their own space distinct from other activities. This is a general best practice for all users, not just CFR Auditing clients.*

    You can add prefixes and/or suffixes from the **Content Integrations > Skillsoft PES** configuration page. We'll go over these steps as we **Integrate with Skillsoft PES** (on page 22) later in the guide.

- Learning Management does not track individual micro videos, so micro video activity details are not included in auditing.

For more on working with auditing in Learning Management, see the *SumTotal Learning Management Auditing Reference Guide*.

# Considerations for Upgrading After 19.1

The following section only applies to clients who integrated with Skillsoft PES **prior to the 19.2 release** and now wish to upgrade.

> *Important: After you upgrade to 19.2, Learning Management automatically performs a full sync during your next sync. This is necessary to ensure consistency between new and previously imported Skillsoft PES content. Please be patient during this full sync, as the large number of files means it may take some time to complete.*

We made some significant updates to the Skillsoft PES integration process in the 19.2 release, restructuring the content and changing the way the sync works. As a result, if you're upgrading to 19.2, keep the following in mind:

- **xAPI Files**: Skillsoft PES content imports as tincan.xml instead of CMI5 files. Both support xAPI tracking, so you can still track interaction details.

  The change to tincan.xml files has no impact on past completion records. However, it does have minimal impact on your learners. If a course is in-progress during the upgrade, then any learner interactions with that course before the upgrade will not be visible from the **Progress Details** page. Any interactions done with the course after the upgrade will be available on the **Progress Details** page as usual. The **Start Time** for the course will also be available.

  This only affects the information displayed on the **Progress Details** page. The records themselves are still intact and the learner can pick up where they left off on the in-progress activity.

> *Note*: *The "hidden" in-progress interaction details described above will not be automatically available via reporting, but if you require it for compliance, it can be restored. If needed, talk to your SumTotal support representative.*

- **Default Asset Bin**: In 19.2, we introduced a new asset bin, "PES Content (Default)," which contains all imported Skillsoft PES content that doesn't fit into the other asset bins (such as Courses or Books). In other words, it's now considered the "default" bin. As a result, whatever activity type you'd selected as the Default before the upgrade will get automatically mapped to this PES Content (Default) bin.

  For example, say you had previously selected Courses as the default asset bin and mapped it to the Learning Management activity type "Course." With the 19.2 upgrade, PES Content (Default) is automatically mapped to this same Course activity type. You can change this using the Skillsoft PES configuration page's Activity Type Mappings if needed.

- **Activity Name Prefixes** and **Suffixes**: If you'd previously set activity **name** prefixes and/or suffixes, the full sync will remove them from all activity names. Activity **code** prefixes and suffixes are not affected.

- **Requiring Registration**: If you had previously required registration on Skillsoft PES activities, this will reset to **No registration required**.

- **Micro Videos**: If you previously chose to hide micro-learning videos from Enterprise Search, when you upgrade to 19.2, the checkbox **Do not import micro-learning videos** on the configuration page is automatically selected. You can update this from the Skillsoft PES configuration page if needed.

# Integrate with Skillsoft PES

> *Best Practice*: To ensure the integration goes smoothly, we strongly recommend working with professional services to set up your Skillsoft PES integration.
>
> If you've already synced with Skillsoft PES at least once and want to make any changes to your configuration settings, contact your SumTotal support representative to discuss the impacts this will have on your existing imported content.

Now that you understand the integration process, you're ready to configure your synchronization settings.

1. Make sure you're in the domain where you want the activities to be synchronized.

   > *Best Practice*: We recommend **creating a single, unique domain** for your integration and only synchronizing in that one domain. This way, if there are any implementation issues and you need to start over, it won't affect other activities or domain properties. Additionally, synchronizing in multiple domains may negatively impact the completion of imported Skillsoft PES content and the experience of micro-learning videos.

   Once the sync is complete, you can then use audiences to manage who can see the activities. This will also prevent there from being duplicate activities across domains. See **Associate Skillsoft PES License Pools to Learning Management Audiences** (on page 32) for instructions.

   > *Important*: Do **not** move the activities to a different domain after synchronizing. This will break the sync and the integrated content will stop updating automatically. You should keep the activities in the domain where you set up the integration.

2. In the Header menu, click .
3. Navigate to **Setup > Learning > Domain Settings > Content Integrations**.
4. Find **Skillsoft PES** and click **Edit**.

## EDIT

Enter the default learning activity properties below. Learn will only apply these properties to learning activities synchronized in the future. Content is synchronized daily.

**◆percipio**™

**Status**

☐ Activate

**Host Name** *

[                              🔒 ]

**API Token** *

[                              ]

**Organization UUID** *

[                              ]

[ **TEST** ]

**Unique User Identifier**

[ Person Id                    ▾ ]

**Prefix to Learning Activity Code**

[                              ]

**Suffix to Learning Activity Code**

[                              ]

**5.** Select **Activate** to enable Skillsoft PES integration.

Enabling allows you to integrate Learning Management and Skillsoft PES via Skillsoft PES's API. Disabling prevents future syncs, but any previously added courses will remain as activities in Learning Management.

Once activated and synced, any changes to the following configurations will only affect content that are added after the next sync.

**6.** Enter the **Host Name** as "https://api.percipio.com".

**7.** Enter your Skillsoft PES credentials. Your Skillsoft account representative will provide you with the information you need to enter in the following fields:

▸ **API Token**: Append "Bearer " (include a space after the word) to the beginning of the token provided by Skillsoft.

▸ **Organization UUID** (universal unique identifier)

Again, if you're not sure what to enter, talk to your Skillsoft account representative.

**8.** Click **Test** to make sure your connection works.

9. Select the **Unique User Identifier** (UUID). This is how Skillsoft PES and Learning Management will recognize individual users. You can choose Username, Person Number, or Person ID.

> *Important: If you select "Username" as the UUID, do **not** make any changes to the learner's username after they've been introduced to the Skillsoft PES content (this includes capitalization, as usernames are case-sensitive). If you change the username, Percipio considers this a new user; their previous completions will be lost and new completion records will be assigned to the user.*

Whichever one you select, the user's Skillsoft PES and Learning Management details must match. For example, if you choose "Username," then the user's name must be the same in Skillsoft PES and Learning Management.

When a learner launches a Skillsoft PES course in Learning Management, Skillsoft PES checks the user's UUI. If the user does not exist in Skillsoft PES with the identifying value, then Skillsoft PES automatically creates a new user.

> *Important: Once you set a Unique User Identifier, you shouldn't change it, as it will create duplicate user records.*

10. Set prefixes and/or suffixes for the **Learning Activity Code**.

| Prefix to Learning Activity Code | Suffix to Learning Activity Code |
|---|---|
| | |

We recommend adding the content provider's name (for example, PES) to the activity **code** so administrators can quickly see which activities in your system have been imported from Skillsoft PES. Prefixes and suffixes make it easier to pull a usage report (by using the filter "activity code begins with" or "activity code ends with").

Any spaces added before or after these will be truncated. For example, if you add " - PES" it will appear as "ActivityCode- PES" rather than the expected "ActivityCode - PES."

> *Important: Take care when choosing your prefixes and suffixes, as future edits to these fields can cause inconsistences.*

11. Decide if you want to import micro-learning videos.

**Settings**
☐ Do not import micro-learning videos

sumtotal®

Many Skillsoft PES courses are divided into digestible "chunks" called micro-learning videos (or micro videos for short). These are not individual activities, but instead parts of an imported course.

You can choose whether to import micro videos into Learning Management. If you don't import them, learners will still have access to the content included in the micro videos, but they must access them through the complete course.

Think of courses like an album and micro videos like individual songs. If you import micro videos, learners can listen to just a few songs off the album. If you do not import micro videos, they need to listen to the entire album.

▶ If you import micro videos, they're imported as **Videos**. Administrators can't access or edit them, but you can choose to make them available in Enterprise Search to learners. See **Understanding Micro Videos** (on page 42) for more information on how they work.

▶ If you don't want to import micro videos, select Do not import micro-learning videos. Keep in mind that if you initially select this checkbox, run your first full sync, and then decide you do want to import micro videos, you'll need to reach out to your SumTotal support representative to run another full sync. See "Considerations for Modifying Configuration Settings" (above) for more.

12. Configure the **Library Synchronization Settings** if you want to make Skillsoft PES imported bundles available in the SumTotal Learning Management Library.



*Tip: Before you configure the **Library Synchronization Settings**, make sure you understand expected behavior and how the two settings interact with each other. See **Syncing the Library** (on page 14) for details.*

a) Select **Enable topic hierarchy creation** if you want to maintain the Skillsoft PES area and subject hierarchy. Areas and subjects are imported into Learning Management as topics and subtopics, respectively, with the appropriate bundles (imported channels) and Aspire Journeys contained within them.

If you don't select this checkbox, the areas and subjects will not be imported and all Skillsoft PES bundles and Aspire Journeys exist under either "no topic" (meaning they don't display in the Library) or the default parent topic (as entered in the next step).

sumtotal®

**b)** Click **Browse** to choose the **Parent Topic**. This is the Library topic where learners can find all Skillsoft PES bundles.

- If you selected **Enable topic hierarchy creation** (above), this parent topic will contain additional topics (imported subjects and areas) that contain the Skillsoft PES bundles and Aspire Journeys.

- If you did NOT select **Enable topic hierarchy creation**, this parent topic contains all imported Skillsoft PES bundles.

When selecting the **Parent Topic**:

- As noted in the "Before You Begin" section, we recommend creating a custom Library topic (for example, "Skillsoft PES") to contain your Skillsoft PES content.

- If you select the root topic ("Topics"), Skillsoft PES content displays as soon as you open the Library. If you selected **Enable topic hierarchy creation**, this means the imported subjects displays as top-level Library topics. If you didn't select it, then the Skillsoft PES activities display when you open the Library, but don't display in any of the actual topics.

- If you don't select a **Parent Topic** at all, the Skillsoft PES activities don't display in the Library.

**13.** Customize the **Activity Type Mapping**.

**ACTIVITY TYPE MAPPING**

| Asset Bins | Activity Type |
|---|---|
| Course | Course ▾ |
| Book | Document ▾ |
| Audio Book | Document ▾ |
| Book Summary | Document ▾ |
| Audio Book Summary | Document ▾ |
| TestPrep | Document ▾ |
| Practice Lab | Document ▾ |
| PES Content (Default) | Document ▾ |

When Skillsoft PES content is imported into Learning Management, it's divided into asset bins. The asset bins relate to content types in Percipio, except for PES Content (Default). The

PES Content (Default) asset bin contains all imported content (except channels and micro-learning videos) that don't fit under the other asset bins. That's why it's marked as the "default" asset bin.

Most additional content is considered a "course" in Skillsoft PES, so you may want to map PES Content (Default) to the Learning Management activity type "Courses" for consistency's sake.

> *Note: Due to their unique nature, Skillsoft PES channels are automatically imported as bundles and (if enabled) micro-learning videos are imported as "videos." There's no way to change this.*

Use the drop-down menus in the **Activity Type** column to select the activity type. You can either assign Skillsoft PES asset bins to an existing Learning Management activity type to seamlessly integrate them with your Learning Management activities, or you can create a new activity type specifically for Skillsoft PES to help learners and managers search for and track those activities separately.

> *Tip: We recommend creating a **new** activity type for Skillsoft PES activities. This will help with both search filtering and reporting. For example, you could create the activity type "Skillsoft PES Course," and then map it to the "Courses" asset bin shown above.*

▶ *For details on creating activity types, see the SumTotal Learning Management System Administrator Guide.*

**14.** Configure the **Schedule Settings**.

**SCHEDULE SETTINGS**

○ Manual
◉ Automated

**Time Zone**

(UTC+00:00:00) GMT [Atlantic/Reykjavik] ▼

**Schedule Type** *

One Time ▼

**Start Date** *

[                                                    ] 📅

**Start Time (Hour)** *

0 ▼

**Start Time (Minutes)** *

0 ▼

a) Decide if you want the sync to be **Manual** or **Automatic**. If you select **Manual**, remember to periodically sync content so your system is up-to-date.

b) If you select **Automatic**, set your sync schedule.

- **Schedule Type**: You can sync One Time, Daily, Weekly, or Monthly.

> **Best Practice**: *We strongly recommend a daily sync, as Skillsoft PES channels get updated frequently.*

- (One Time only) **Start Date**: Enter when you want the one-time sync to occur.

- **Time Zone**: Select the time zone to use for the schedule sync. This affects the **Start Time** you choose in a later field.

- (Weekly only) **Schedule Days**: Choose the day when the weekly sync occurs (for example, Saturday).

- (Monthly only) **Schedule Month Day**: Pick the day of the month when the sync occurs (for example, 1).

> **Note**: *If you had selected **Monthly** and you choose 32 for the day of the month, the import will always run on the last day of the month. If you select 31, the import will only run at the end of months that have 31 days.*

- **Start Time (Hour)** and **Start Time (Minutes)**: Schedule exactly when the sync occurs. This is based off the **Time Zone** you chose earlier. It's best to choose a time during non-peak business hours so there's no performance impact on your users.

For example, you could have your sync run once a week on Saturday at 12:00 AM EST.

15. Click **Save**. Synchronized Skillsoft PES content is immediately published and available to learners once it's synced.

16. Once your Skillsoft PES content is synchronized for the first time:

▶ You must map Skillsoft PES license pools to Learning Management audiences so your learners can access the imported activities. See **Associate Skillsoft PES License Pools to Learning Management Audiences** (on page 32) for an overview of licenses and license pools as well as instructions for how to map them.

▶ Training administrators can manage imported Skillsoft PES activities and bundles from the **Activity Management** page the same as you would a SumTotal Learning Management activity, with some exceptions. For a list of considerations, see **Manage Synchronized PES Activities** (on page 37).

▶ If you selected **Enable topic hierarchy creation**, imported Skillsoft PES topics may have identical names to existing topics in your Library (for example, "Certifications"). This may

cause confusion, especially if your Skillsoft PES activities aren't in their own unique parent topic.

Since imported Skillsoft PES topics are not editable, you may want to update the names of your Learning Management topics to avoid duplicates. For instructions on editing Library topics, see the *SumTotal Learning Management System Administrator Guide*.

# Manage Skillsoft PES from the Content Integrations Page

In addition to configuring your integration with Skillsoft PES, you can also manage the following tasks from the **Content Integrations** page:

- **Activate or deactivate a content integration from the main page** (below)
- **Manually synchronize integrated content** (below)
- **View an integration's import history and import logs** (on the next page)

▶  *Activate or deactivate a content integration from the main page*

*Tip: You can also do this from the integration's configuration page, as described in the previous section.*

1. From the **Content Integrations** page, select the checkbox next to the integration you want to update.
2. Click either **Activate** or **Deactivate**.

   Disabling prevents future syncs, but any previously added courses will remain as activities in Learning Management.

▶  *Manually synchronize integrated content*

When you activate your integration, you can configure the sync to recur at a scheduled time. This way, data will continue to be automatically updated until you inactivate the integration. In other words, if any integrated objects change (for example, someone creates new content), Learning Management automatically updates during the scheduled sync to reflect those changes.

However, if you'd prefer to sync manually or if need to sync sooner than your scheduled time, you can do so from this **Content Integrations** page.

> *Tip*: *This sync occurs at the domain level. If you want to make the activities available in other domains, rather than synchronizing in every domain and ending up with duplicate activities, you can use audiences to manage who can see the activities. See **Associate Skillsoft PES License Pools to Learning Management Audiences** (on page 32) for instructions.*

1. From the **Content Integrations** page, select the checkbox next to Skillsoft PES.
2. Click **Sync Data**.

   You can run syncs in parallel across domains, but you can only run one sync per domain at a time. If a sync is in progress in this domain, you need to wait until it's finished to start a new one.

> *Tip*: *A sync can take several hours depending on the amount of data you're importing, so please keep this in mind when running new syncs. If a sync is "In Progress" and you need to run a new sync, it can be cleared from the database. Please contact support to assist you with this process.*

3. Refresh the page to see the **Last Sync Date** populate.
4. Be sure to map any new license pools to Learning Management audiences so your users can find the activities they need. See **Associate Skillsoft PES License Pools to Learning Management Audiences** (on page 32) for more.


▶ *View an integration's import history and import logs*

Once you've activated a content integration, you can track its syncs and import data.

1. From the **Content Integrations** page, Skillsoft PES.
2. From the **Actions** split-button, select **View Import History**. A summary of the previous syncs displays.

### SKILLSOFT PES - SYNC HISTORY

| HistoryId ⇵ | Run Type | Run Time | Completed | Status | Initiated By | Import Log |
|---|---|---|---|---|---|---|
| 2 | Manual | 6/11/2018 5:52:10 PM CEST | | In Progress | admin | |
| 1 | Manual | 6/11/2018 11:11:05 AM CEST | 6/11/2018 11:14:39 AM CEST | Success | admin | **DOWNLOAD** |

3. Click **Download** next to a sync to view its full details in an **Import Log**.

   This is a high-level log that contains overall job information, not specific activity-level details. We'll look into including more detailed information in a future release.

   ▶ *For common log data and troubleshooting suggestions, see **Import Log Data** (on the facing page).*

# Import Log Data

If you're having issues with your Skillsoft PES sync, you can check the **Import Log** to troubleshoot. Common issues are listed below. We will continue to update this list as needed.

- **Sync History**: The sync history will be available from the **Content Integrations** page for seven days. Historical logs are still available in the Datastore/Common/**MoocImport** folder.

- **Sync "Failed"**:

  ▶ If any of the imported object's status reads "Failed" in the log, then the entire sync is considered to be "Failed." You can refer to the logs for more details on the failure.

  ▶ The Skillsoft PES sync is considered "Failed" when any **deadlock issues** are observed under the **ELMS Errors** section.

    The activity codes that caused the deadlock issue are listed at the end of the import log.
    All these activity codes need to be moved to production from the **Admin > Product Administration > Learning > Learning Activities** page .

> *Tip: There is no need to re-execute the sync if the Skillsoft PES sync failure is specific to deadlocks.*

- **MOOC Errors** log section:

  ▶ If the Skillsoft PES sync fails due to any of the below errors under the **MOOC Errors** section of the log, please contact your Skillsoft account representative for further assistance:

    ◦ # ResponseCode(InternalServerError)

    ◦ # Any parser error with '<' HTML tags

    ◦ # BadGateway

    Based on the response from your support representative, the Skillsoft PES sync will need to be executed again.

- **Inactivations and Audience Removals**: If the Skillsoft PES **license pool** (on the next page) expired or the content was retired and is no longer a part of any license pool, SumTotal automatically removes all registration audiences from the activity so nobody can access it. These activities are listed in the log under one or both of the following sections:

  ▶ "The following [number] activities are inactivated because they are not associated with any license pools or audiences": SumTotal removed the activity from all audiences and also inactivated it.

  ▶ "The following [number] activities cannot be inactivated because they are subscription link sources, however, their audience associations have been removed": SumTotal removed the activity from all audiences but did not inactivate it because it's subscribed to an activity structure (such as a curriculum). You need to manually retire these activities.

# Associate Skillsoft PES License Pools to Learning Management Audiences

In order to give learners access to Skillsoft PES content, you need to associate the available Skillsoft license pools to the corresponding Learning Management audience. You can do this from the **Skillsoft PES License Pools** page.

**SKILLSOFT PES LICENSE POOLS**

This page allows you to associate Skillsoft PES License Pools with Learn audiences.

Displaying 1 - 4 of 4 Records  10  25  50  100

| License Pool Name ▲ | Domain | Expiration Date ⇕ | Purchased Licenses | Actions |
| --- | --- | --- | --- | --- |
| BusinessManagementAccelerator (Courses) | Global | 1/31/2020 | 10 | EDIT |
| DigitalSkills (Courses) | Global | 1/31/2020 | 10 | EDIT |
| LeadershipDevelopmentProgram (Books) | Global | 3/22/2019 | 500 | EDIT |
| LeadershipDevelopmentProgram (Courses) | Global | 3/22/2019 | 500 | EDIT |

Make sure to read over **Understanding License Pools** (below) and **Understanding Licenses in SumTotal** (on the facing page) so you know how licenses work in SumTotal. Once you do, you can **Associate license pools with audiences** (on page 34).

**Understanding License Pools**

In Skillsoft PES, customers license "collections" which are a comprised of both channels (bundles) and activities. The number of seats a customer licenses for a collection is a called a "license pool." License pools have an expiration date and a fixed number of licenses, which determines how long the license is valid and how many users can access the associated content.

When you integrate with Skillsoft PES, Learning Management automatically imports and maintains associations between license pools and Skillsoft PES content. You can then associate these license pools to Learning Management audiences to ensure the same learners have access to the same activities across both systems.

You can only update Skillsoft PES audiences by associating them with license pools from the **Skillsoft PES License Pools** page. You can't update the audiences from an individual activity's Staging Editor.

- *For more on Learning Management audiences, see the SumTotal Learning Management System Administrator Guide.*

When you associate a license pool to one or more audiences, Learning Management assigns those audiences to every activity associated with the license pool. This association uses an "OR" rule, meaning learners must belong to at least one of the selected audiences to view and register for the activity. License pools always use the "OR" rule, regardless of global membership rules.

> *Tip: Every time Learning Management synchronizes with Skillsoft PES, any new license pools created in Skillsoft PES also get imported to Learning Management. If you don't associate these license pools to audiences, your learners won't be able to access their Skillsoft PES content in Learning Management. As such, it's a good idea to set a schedule for yourself (once a week, for instance) when you check your available license pools to ensure they're all associated with the relevant audiences.*

After a license pool expires in Skillsoft PES:

- The license pool becomes grayed-out and not editable on the **Skillsoft PES License Pools** page.

- The **Expiration Date** column updates to read "(Expired)" next to the date.

- Any activities associated with the expired license pool lose their Learning Management registration audience associations.

- All **standalone** Skillsoft PES activities or channels (bundles) associated with the license pool are automatically inactivated. If an imported Skillsoft PES activity is **subscribed to a curriculum**, Learning Management still removes the audience associations but does not inactivate the activity. The Sync History's import log lists any obsolete activities that weren't inactivated. Training administrators need to manually retire these activities.

  - *For more on retiring content, see **Working with Obsolete Activities** (on page 48).*

Once the license pool gets renewed, the license pool's **Expiration Date** updates to the new date, the license pool's **Edit** button becomes available, and any inactive activities are automatically re-activated. If you made any manual updates to the activities associated with the renewed license pool, you need to revert those changes to allow learners to find the activities again. For example, if you selected **Hide from search results for Learners and Managers** or entered a value in the **Expires on** field of the activity's Metadata properties page, you should clear those fields.

**Understanding Licenses in SumTotal**

> *Note: Licenses are handled within Skillsoft, so the following serves as an overview only. For additional information on how licenses work, please talk to your Skillsoft account representative.*

Skillsoft Percipio (PES) controls licenses and collections. SumTotal is aware of license pools but is not the system of record; SumTotal is the system of record only for which groups of users are entitled to each activity.

In other words, while you can view the expiration date and total number of licenses from the **Skillsoft PES License Pools** page, SumTotal doesn't track how many licenses have been consumed. All validations are performed within Skillsoft PES.

> *Important Note for Auditing Clients*: Because SumTotal isn't the system of record for what has been licensed versus what's been consumed, you can **not** perform a formal audit on Skillsoft PES content through SumTotal. License audits must be handled through Percipio.

Skillsoft's approach to license management is to not negatively impact the user and work with the customer to true-up. This means that, if an activity reaches its maximum number of licenses and another user tries to launch that activity, they **can** do so.

Skillsoft may not immediately revoke the access of the content to new users. That said, if this happens, we recommend working with Skillsoft professional services to increase your license count.

▶    *Associate license pools with audiences*

> *Tip*: You need the **CanMapSkillsoftPESLicensePools > View**, **Add**, and/or **Edit** permissions to access and edit this page.

1.    In the Header menu, click .
2.    Navigate to **Product Administration > Learning > Integrated Objects > Skillsoft PES License Pools**.

**SKILLSOFT PES LICENSE POOLS**

This page allows you to associate Skillsoft PES License Pools with Learn audiences.

Displaying 1 - 4 of 4 Records   10   25   50   100

| License Pool Name ▲ | Domain | Expiration Date ⇕ | Purchased Licenses | Actions |
| --- | --- | --- | --- | --- |
| BusinessManagementAccelerator (Courses) | Global | 1/31/2020 | 10 | EDIT |
| DigitalSkills (Courses) | Global | 1/31/2020 | 10 | EDIT |
| LeadershipDevelopmentProgram (Books) | Global | 3/22/2019 | 500 | EDIT |
| LeadershipDevelopmentProgram (Courses) | Global | 3/22/2019 | 500 | EDIT |

3.    Find the **License Pool Name** and click **Edit**.

sumtotal®

4.   From the **Activities** tab, you can see the Skillsoft PES content associated with this license pool. If needed, click **View** to see more about this activity.

License pools are associated with activities in Skillsoft PES. You can't update them in Learning Management. If you need to update these associations, talk to your Skillsoft account representative.

5.   Click the **Audiences** tab. You'll see a list of audiences that belong to your primary or secondary domains and any of their child domains.

6.   Perform one of the following:

►   To associate a new audience with this license pool:

   i.    Click **Add Audience**.

   ii.   Select the checkboxes next to the audiences you want to associate with this license pool and all its associated activities.

   iii.  Click **Add**. This license pool is now associated with the selected audience(s). Remember that learners must belong to at least one of the listed audiences to access the associated Skillsoft PES content (as seen on the **Activities** tab).

►   To remove one or more associated audiences, select its checkbox and click **Remove Audiences**. Keep in mind that this also removes these audience associations from the Skillsoft PES content listed on the **Activities** tab.

# Troubleshooting

Additional common troubleshooting tips are provided below. We will continue to update this section as needed.

**License Pool Mapping**

SumTotal runs the licensepool sync job daily, which updates the license pool and activity associations. However, if any Skillsoft PES activity is not getting listed with any of the imported License Pools in a particular domain, then you can run a manual sync by performing the following steps:

sumtotal®

1. Go to the **DataStore** or **UFS server** location for the tenant

2. Go to the **tenant** folder and navigate to this path:

   `Common\MOOCImport\Domain_`**`<DomainID>`**`\DeltaSync\Provider_-3`

   Replace <DomainID> with your domain ID.

3. Delete the **licensepool.json** file.

4. Go to **UTA server** and navigate to the folder: tasks/learning/moocimport

5. Open **cmd prompt** for this folder location

6. In the command prompt, type:

   `SkillsoftPESLicensePoolSyncJob.cmd `**`<tenantKey>`**

   Replace <tenantKey> with your tenant key.

If the issue still persists, reach out to Skillsoft account representative for help.

**Skillsoft PES Content Not Getting Marked as "Complete" in SumTotal**

There are some scenarios where learners are completing Skillsoft PES content but it's not getting marked as complete ("Attended") in SumTotal.

If you experience this issue, first read through the "Completion Tracking" section of **Launch and Track Skillsoft PES Activities in Learning Management** (on page 44) to understand completion tracking between Percipio and SumTotal. Then, if needed, contact your support representative to help you investigate and resolve the issue.

Do **not** manually mark completions using the Training Migration Tool (TMU), as this can lead to reporting and auditing issues.

# Manage Synchronized PES Activities

As noted in previous sections, SumTotal Learning Management imports Skillsoft PES channels and content from the integrated Skillsoft PES system. As such, you cannot create Skillsoft PES materials in Learning Management. Once the channels and content have been synchronized into the system, you can access them in Learning Management.

- *For a refresher course on the Skillsoft PES content that's imported into Learning Management, see* **Understanding Skillsoft PES Integration** *(on page 7).*

In general, once a Skillsoft PES activity is imported into Learning Management, you can edit it from **Activity Management** the same as you would any other activity. There are, however, some exceptions and special considerations to take into account.

This section walks you through how Skillsoft PES content behaves in Learning Management as a training administrator.

> *Tip: Remember that this guide assumes you're familiar with SumTotal Learning Management. If you need instructions on general activity management properties or workflows, please see the SumTotal Learning Management Training Administrator Guide.*

## Imported Activities and Activity Types

Imported Skillsoft PES channels always use the "Bundle" activity type and microlearning videos always use the "Video" type, but other Skillsoft PES content may use different activity types depending on your organization's configurations.

Remember that activity types are determined in the **Activity Type Mapping** section of the Skillsoft PES **Content Integrations** page.

You can use the table below to fill in your own activity types for a quick reference:

| Skillsoft PES Content Type | Learning Management Activity Type |
|---|---|
| Course | |
| Book | |
| Audio Book | |
| Book Summary | |
| Audio Book Summary | |
| TestPrep | |

| Skillsoft PES Content Type | Learning Management Activity Type |
|---|---|
| Practice Lab | |
| PES Content (Default)* | |

> *Depending on your company's licenses with Percipio, the **PES Content (Default)** bin may include Aspire Journeys and/or Live Events.

If you need a refresher course on the content that gets imported and how it displays in Learning Management, see **Understanding Skillsoft PES Integration** (on page 7).

# Available Activity Properties

While you can edit and manage some activity or bundle properties through Learning Management, some are either "locked" or unavailable for Skillsoft PES content.

- **Imported Properties**:
  - ▶ The following activity and bundle properties are imported from Skillsoft PES and are not editable in Learning Management:
    - ○ **Name**
    - ○ **Image**
    - ○ **Activity Type**
    - ○ **Code**
    - ○ **Description**
    - ○ **Estimated Duration**
    - ○ **Delivery Method**
    - ○ **Modality Filter**
    - ○ **Language**

    If there are any updates in Skillsoft PES, the Learning Management properties will update to match during the next sync.
  - ▶ The activity's **Primary Domain** is determined during the import process. You cannot change the primary domain, but you can use audiences to manage who can see the activities. See **Associate Skillsoft PES License Pools to Learning Management Audiences** (on page 32).

- ▶ The activity's default **Owner** is your default system administrator. You can update this if needed.

- ▶ Skillsoft PES activities have **No registration required** selected by default.

> *Best Practice*: Do not require registration on imported Skillsoft PES content. If you do, it causes issues when learners launch content from the Percipio channel page. The Start button always displays on the Percipio channel page for the associated activities (even if the activity requires registration), and Learning Management cannot validate prerequisites for courses launched from the Percipio channel page.

- **Completion Properties**: Percipio only honors the user's first completion of an activity. Once a learner completes an activity once, the activity goes to Review mode and does not count as a completion anywhere completions are tracked (such as the Training Transcript or activity roster). This impacts the follow activity properties:

  - ▶ **Certifications**: Skillsoft PES activities imported into Learning Management do not support certification expiration dates or the **Enable retraining** option. If you configure these fields for Skillsoft PES activities, their values will not be honored.

  - ▶ **Assignments and Registrations**: If the administrator assigns or registers a learner to a Skillsoft PES activity that the user has already completed, there is no way for the learner to complete the activity. The administrator will have to manually mark them as complete.

  - ▶ **Subscriptions**: If you subscribe a Skillsoft PES activity to another activity (like a curriculum), ensure the subscription link honors past completions. Otherwise, any user who already completed the Skillsoft PES activity cannot complete the curriculum.

  - ▶ **Fulfillment Links**: We do not recommend having a Learning Management activity fulfill a Skillsoft PES activity, because the completion data is not synchronized with Percipio. In other words, the Skillsoft PES activity is still considered incomplete in Percipio.

    However, you can have a Skillsoft PES activity fulfill a Learning Management activity. When setting up the fulfillment link, you must use the option **Honor completions from [date]** to ensure the completion gets properly tracked.

  - ▶ *See **Launch and Track Skillsoft PES Activities in Learning Management** (on page 44) for details on completion tracking.*

- **Activity Structures**:

  - ▶ You can associate Skillsoft PES activities with Learning Management bundles.

  - ▶ If you select **Can be subscribed** for the Skillsoft PES activity, you can subscribe Skillsoft PES activities to another activity (such as a curriculum).

sumtotal®

- **Restricting Access**:

  If you want to define which users can access Skillsoft PES content, you must do so through the **Skillsoft PES License Pools** page. You can't define **Registration > Audiences** in the Staging Editor. For instructions, see the *SumTotal Learning Management System Administrator Guide*. For instructions, see **Associate Skillsoft PES License Pools to Learning Management Audiences** (on page 32).

- **Unavailable Properties**:

  ▸ As with other activity types, some properties are unavailable because they're not applicable. For example, Skillsoft PES activities don't have prices or support remote content server access, so the **Costs**, **Extended Enterprise**, and **Remote Content Server** properties don't display.

  ▸ Skillsoft PES certifications are not the same as Learning Management certifications. As such, they do not use the **Certifications** activity properties.

# Working with Bundles (Imported Channels)

- The available properties for bundles are limited. For example, you can't assign or register bundles directly to learners.

- Skillsoft PES's **Dimension** filters aren't accessible or editable in the Staging Editor. Dimensions are updated on the Skillsoft side.

- Skillsoft PES bundles are not compatible with Extended Enterprise. If you edit an imported Skillsoft PES bundle, the Extended Enterprise settings for that bundle are disabled.

- The **Associated Activities** page of the Staging Editor does not list the PES bundle's activities. This is because you cannot add, reorganize, or remove content from a Skillsoft PES bundle in Learning Management. Any updates need to occur within Skillsoft PES itself, and then the changes will be imported to Learning Management during the next sync. If you want to see the activities associated with a Skillsoft PES bundle, you need to view its channel page.

- When a learner goes to an imported bundle's details page, it redirects them to the Percipio channel page. They can then view and access the content from Percipio. Any activities they launch from the channel page will be tracked in both Percipio and Learning Management.

*Tip*: *Use caution when in emulation mode. You can launch and complete courses from the channel page and Learning Management will track your progress and completions as if you were the learner.*
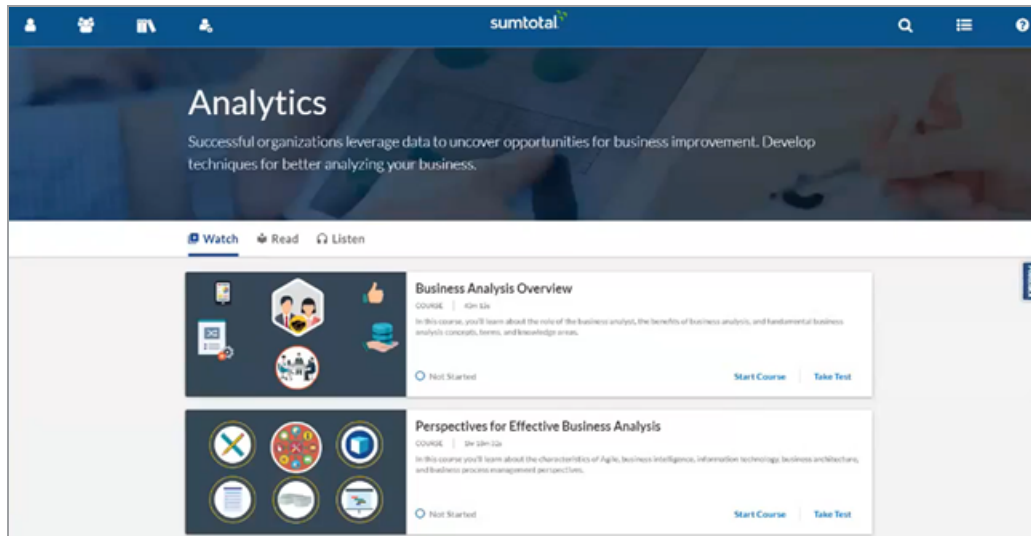
The Percipio channel page is embedded into SumTotal, meaning learners can still see and use the SumTotal navigation bar. However, the page itself is from Percipio and functions according to Percipio standards. For example, if the channel supports Mentor functionality, you can contact a mentor from this page.

This also means the channel page doesn't contain standard Learning Management functions like the Favorite or Share options. Learners can still access these options from the bundle's tile in Enterprise Search or the Library.

If you need more information on Percipio channel pages, consult your Skillsoft help documentation.

- SumTotal tracks content launched from the embedded channel page. However, in-progress activities do not display on SumTotal training pages, such as the **Training Schedule** or **Resume Learning** widget. If learners need to resume learning, they should go back to the channel page or find the acivity via Enterprise Search. Once the learner completes the activity, it appears on their **Training Transcript** and **Training Schedule** along with all other training.

- When learners launch content from the Percipio channel page, after they close the content, they're redirected back to the channel page. They can then click **Exit Training** to go back to the page where they accessed the channel (such as search results), or use the Header menu links to navigate to another SumTotal page.

- (Advanced Reporting users only) Associated activities will not be available in reporting for Skillsoft PES reporting on Percipio Channels. You can still pull reports for individual activities imported into Learning Management.

## Understanding Dimensions and Activity Filters

There are two types of filters that, if applicable, allow learners to filter activities in a bundle (channel): "dimensions" from Skillsoft PES and "activity filters" from Learning Management.

While they act the same for learners, they behave differently for administrators:

| | Dimension Filters | Activity Filters |
|---|---|---|
| **Associated with:** | Imported Skillsoft PES bundles (channels) only.<br><br>Individual activities don't have dimensions. | Individual activities (including Skillsoft PES content) **except** bundles.<br><br>The bundle's associated activities can have filters, but the bundle itself cannot. |
| **Editable in Learning Management?** | No. They are updated automatically based on settings in Percipio. | Yes. You can modify them from the Staging Editor's **Activity Filters** page.<br><br>This properties page doesn't display for imported Skillsoft PES bundles since they use dimensions instead. |
| **Accessible to learners from:** | The channel's page in Percipio. Learners see this page when they view the details of an imported Skillsoft PES bundle in Learning Management. | • Enterprise Search (if enabled)<br><br>• The Learning Management custom bundle's details page (if the activity is associated with a bundle) |

# Understanding Micro Videos

Many Skillsoft PES courses are divided into digestible "chunks" called micro-learning videos. These are not individual activities, but instead parts of an imported course. This means you can't view or edit them in **Activity Management**.

However, you can configure Enterprise Search so that your learners can find and access individual micro videos. See **Configure Micro Video Search Settings** (on page 50) for instructions.



The administrator who configures Skillsoft PES integration can choose to not import micro videos. If they do, then none of the following applies to your learning activities. See **Integrate with Skillsoft PES** (on page 22) for more on configuration settings.

If your company chooses to import micro videos, please note:

- Since micro videos aren't accessible from **Activity Management**, you can't associate them with activity structures (such as bundles or curricula). You must associate the entire course that the micro video belongs to.

- Micro videos are accessible to any user who has access to the course the micro video belongs to. In other words, if the course is available for a user's domain and audience, then all of the course's micro videos are available to that user, too.

- Learners can only find micro videos in Enterprise Search using the **Learning** search type. They use the activity type "Video."

- Learners can use the Actions split-button to **Start** the micro video. Micro videos always launch in the context of the course. This means that clicking **Start** launches the course **from the point where the micro video is located within that course**.

> *Note: In **emulation mode**, the micro video has an Actions split-button but no available options (because you can't launch activities in emulation mode). Nothing happens when you click the split-button.*

- Learning Management only tracks progress for the full course, not for individual micro videos. This means:

  ▸ Micro video completions are not included in any reports run in SumTotal.

  ▸ If the learner launches a micro video, neither the micro video nor the full course display as "in progress" activities. In other words, learners won't see them in places like the **Resume Learning** widget or the **Training Schedule** page.

  > *Tip: If a learner launches a micro video and wants to watch the rest of the course at a later date, they should note the name of the course, find it (via Search or Library), and mark it as a favorite ♥ so they can quickly track it down again later.*

  ▸ Once the learner completes every micro video that makes up the course, the course gets marked as "Attended" and displays on the learner's **Training Transcript**, the activity roster, and as part of any relevant completion reports.

- Micro videos do not have an activity details page.

- Micro videos do not display in the Library or on any widgets or pages (such as the Timeline, **Training Transcript,** or **Training Schedule**).

- You cannot mark a micro video as a favorite ♥. You can favorite an entire course, but not a single micro video.

# Launch and Track Skillsoft PES Activities in Learning Management

- **Finding Skillsoft PES Content**: For learners, Skillsoft PES activities work almost exactly like Learning Management-created activities. Learners can find them using Enterprise Search and the Library. They can access assigned activities from the Timeline or the Training Analysis page. They can register for the activities from any of these locations. Finally, they can launch and complete them in Learning Management.

> *Note*: *For special considerations about finding and tracking micro-learning videos, see* **Understanding Micro Videos** *(on page 42).*

- **Mobile Access**: Learners can access all synchronized Skillsoft PES content **except TestPrep and Practice Lab** activities from the Mobile app. Skillsoft PES content is not supported in offline mode.

  - ▸ *For more on how Skillsoft PES activities behave in Mobile, see* **Access Skillsoft PES Activities in Mobile** *(on page 47). For more on the Mobile app in general, see the SumTotal Mobile User Guide.*

- **Progress Tracking**: Skillsoft PES activities are synchronized as tincan.xml files, which means they're automatically xAPI-enabled and will track the learners' **Interaction Details**. Learners can view interaction details from the activity's **Progress Detail** page.

## LEARNING ACTIVITY PROGRESS DETAIL

⚠ If you completed the activity but it's still listed as "In Progress," please check back later. It may take a few minutes to update.

### THE THIRD OPINION: HOW SUCCESSFUL LEADERS USE OUTSIDE INSIGHT TO CREATE SUPERIOR RESULTS

The Third Opinion introduces the emerging concept that every great leader must cultivate advisors outside their organization. In this Review, we discuss the salient points of the book based on our interpretation of its contents.
**GENERAL**

**Content type:**
Experience API

**Total score:**
N/A

**Status:**
In progress

**First launch date:**
 Wednesday, December 18, 2019 8:54:59 AM MST

**Elapsed time:**
 -

When viewing the **General** details, please note that:

▶ The **Elapsed time** remains blank (-) until the learner has completed the activity, then it updates to display the total time spent on the activity.

▶ Some fields may remain blank or read "N/A" even after completion because they don't apply to the content type. For example, **Total score** only applies to TestPrep and Courses with assessments.

▶ It can sometimes take a few minutes for the **Progress Detail** page to update with the completion status. A message at the top of the page alerts learners to this and advises them to check back later.

Under **Interaction Details**, the learner may see the following **Event Descriptions**:

▶ **Launched**: The user has opened the course player but hasn't performed any other actions on it.

▶ **Arrived At**: The user reached the page indicated.

▶ **Terminated**: The user closed the player without completing the activity.

▶ **Completed** or **Satisfied**: The user successfully finished the activity.

▶ **Passed**: The user passed the assessment.

▶ **Failed**: The user did not pass the assessment.

▸ *For more on xAPI, see the SumTotal Learning Management Training Administrator Guide. For more on basic learner processes, like finding or registering for an activity, see the SumTotal Learning Management Learner Guide.*

- **Completion Tracking**:

    Because Learning Management is synced with Percipio, but not vice versa, this affects how completion data gets shared between systems. The following chart shows different completion methods for Skillsoft PES activities and if Learning Management and/or Percipio honor those completions.

| Completion Method | Marked Complete in Learning Management? | Marked Complete in Percipio? |
|---|---|---|
| Launched through Percipio | No | Yes |
| Launched through SumTotal | Yes | Yes |
| Via subscription link in Learning Management | Yes | Yes |
| Via fulfillment link in Learning Management* | Yes | No** |
| Via the activity roster (status marked as "Attended" or "Waived") in Learning Management | Yes | No** |

> **Note**: *Learners can still launch and complete the activity even if it's marked complete on the roster. Keep reading for more details.*

*\*This refers to a learner completing a Learning Management activity that fulfills a Skillsoft PES activity. This is not recommended. However, you can have a Skillsoft PES activity fulfill a Learning Management activity. For more on fulfillment links, see "Available Activity Properties" (above).*

*\*\*If the user needs to be marked complete in both Learning Management and Percipio, they will have to launch and complete the activity again in Percipio.*

Once the learner meets the activity's completion criteria, they're marked complete in both SumTotal and Percipio.

Percipio only tracks course completion once: the first time the user successfully completes the activity and (if applicable) passes the assessment. Learning

Management reflects this behavior. This means learners cannot complete a Skillsoft PES activity multiple times. They can review it, but they can't relaunch it.

- ◦ **Roster Completion Considerations**:

  - • If you have roster access, you can mark an activity as complete (Attended or Waived), but learners can still launch and complete the activity once. The learner's completion data will get synced with Percipio; the roster completion data will not.

  - • You can mark multiple completions on the activity roster, but these extra completions don't sync with Percipio.

  - • In general, the only reason you should manually mark a Skillsoft PES activity as "complete" on the roster is if the activity was completed in Percipio and you want Learning Management's records to reflect this.

    > *Important: Do **not** mark completions using the Training Migration Tool (TMU), as this can lead to reporting and auditing issues. If you're having troubles with Skillsoft PES content getting marked as complete (Attended) in SumTotal, talk to your support representative.*

- ◦ **Subscription and Fulfillment Link Considerations**: Since learners cannot take Skillsoft PES activities twice, if you link a Skillsoft PES activity to another activity (such as a curriculum), you must honor previous completions (one of the **Honor previous successful completions** options for subscription links; the **Honor completions from [date]** field for fulfillment links). Otherwise, any learners who previously completed the Skillsoft PES activity won't be able to complete the new activity.

If there are any issues with score, duration, or completion tracking, please reach out to your Skillsoft PES representation for assistance, as these updates are handled entirely by Percipio.

## Access Skillsoft PES Activities in Mobile

If your company uses Mobile, your learners can most access Skillsoft PES activities and bundles from the Mobile app.

- • Percipio does not support **TestPrep** and **Practice Lab** content in mobile. The **Can launch on Mobile app** checkbox is disabled (cleared) by default and should not be enabled.

- • When you import Skillsoft PES content, the Staging Editor's **Can launch on Mobile app** checkbox is automatically selected for all content that's supported in mobile (in other words, all content except TestPrep and Practice Labs). You can manually clear it if needed.

- Imported Skillsoft PES content is not available offline (in other words, users can't download it).

- Learners can find content in Mobile Search and launch activities the same way they would other non-downloadable, Mobile-enabled activities.

- Learning Management tracks completions for Skillsoft PES content in Mobile the same way it tracks them from the browser. See **Launch and Track Skillsoft PES Activities in Learning Management** (on page 44) for details.

For more on Mobile functions and features, see the *SumTotal Mobile User Guide*.

# Working with Obsolete Activities

- Sometimes activities become unavailable in Skillsoft PES. This can happen because the license pool expired or the content was retired and is no longer a part of any license pool. When this happens, imported Skillsoft PES content in Learning Management behaves as follows:

  - ▶ Learning Management automatically removes all audiences from the activity so nobody can access it. This means that:

    - New learners cannot find or launch the activity (through Enterprise Search, the Library, and so on).

    - If a learner is assigned, registered, or in progress, they'll still see the activity (such as on the Timeline or **Training Schedule**), but when they try to launch it, they'll receive a "course not available" error message.

    - If the user has completed the activity, it still displays on their **Training Schedule** and **Training Transcript**, but they cannot launch it again (even in Review mode).

  - ▶ All **standalone** Skillsoft PES activities or channels (bundles) are automatically inactivated. If the license gets renewed, the activity is automatically activated again.

    If an imported Skillsoft PES activity is **subscribed to a curriculum**, Learning Management does not inactivate the activity. It removes the audience associations, but the activity is still active. The Sync History's **Import Log Data** (on page 31) lists any obsolete activities that were not inactivated. Training administrators need to manually retire these activities.

*Tip: To prevent confusion for learners, you should remove the obsolete activity from any curricula it's subscribed to and inactivate it in Learning Management. See the SumTotal Learning Management Training Administrator Guide for instructions.*

*It's possible to inactivate all currently retired Skillsoft PES content at once using a data correction script. This*

*will not automatically inactivate future retired content, but can be useful as a one-time "clean up" process (such as after upgrading to 19.2). If you'd like to use this script, please contact your SumTotal support representative.*

- If you don't want an imported activity to display in Learning Management, you can  hide it or expire it, but we do **not** recommend deleting it. If you delete an imported Skillsoft PES activity, it will be automatically re-imported when the activity gets updated in Skillsoft PES (as the system compares the timestamp). For this reason, we encourage you to retire the activity instead. Again, please see the *SumTotal Learning Management Training Administrator Guide* for instructions.

# Configure Optional Skillsoft PES Settings

In addition to integrating and synchronizing with Skillsoft PES, there are other settings in SumTotal that you may want to configure to better match your SumTotal experience with your Percipio one.

- **Configure Micro Video Search Settings** (below): Decide if you want to let learners find micro-learning videos when using Enterprise Search.

- **Enable the Learning Focused Dashboard** (below): Set up a dashboard with pre-loaded, carousel-style widgets to simplify your learners' experience.

- **Working with Advanced Reporting** (on page 61): Advanced Reporting users can create ad hoc reports for Skillsoft PES content.

## Configure Micro Video Search Settings

Many Skillsoft PES courses are divided into digestible "chunks" called micro-learning videos. These are not individual activities, but instead parts of an imported course.

- *For more on micro videos, see **Understanding Micro Videos** (on page 42).*

If your company chooses to import micro videos, you can configure Enterprise Search so that your learners can find and access individual micro videos.

1. In the Header menu, click .
2. Navigate to **Common Objects > Configuration > Search Configuration**.
3. Click the **Global Settings** tab.
4. Select **Include individual micro-learning videos that are a part of a course in the search results** to allow learners to search for individual micro-learning videos. If you don't select this, learners won't see micro videos in the search results.
5. Click **Save**.

> *Note: The above are quick-reference steps focusing on Skillsoft PES-specific configurations. If you want to know more about the other options on this page, see the SumTotal Core Platform Administrator Guide.*

## Enable the Learning Focused Dashboard

The Learning Focused Dashboard is an out-of-the-box, default dashboard that gives users easy access to content that's important to them. This dashboard comes pre-loaded with the following widgets: Search,

My Learning, Resume Learning, My Favorites, and Recommended Activities.

With these widgets, learners can find, track, and complete their training more easily. Users with the proper permissions can also personalize the dashboard the same as they would any other dashboard.

- *For more on customizing dashboards, see the SumTotal Core Platform Administrator Guide.*



If you started using SumTotal **after** our 18.2 release, this dashboard displays as the "Home page" for all Learning Management-only users by default. If you used SumTotal **prior** to 18.2, the system maintains your existing dashboard configurations, but you can opt to enable the Learning Focused Dashboard. When you enable it, this dashboard becomes the default for Learning Management-only users.

> *Note: The following is a quick-reference only. For detailed information on working with dashboards as an administrator, see the SumTotal Core Platform Administrator Guide.*

1. In the Header menu, click ⬛.
2. Navigate to **Dashboards** and select one of the existing available dashboards. It doesn't matter which one.
3. Click ⚙ to open the dashboard **Configuration** page.
4. Make sure **Master** is selected.
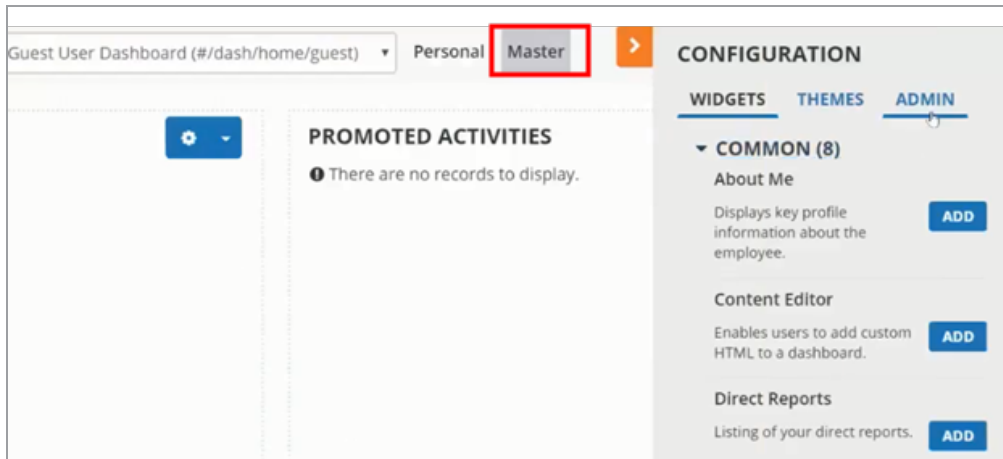
5. Click **Admin**.

6. Enable the Learning Focused Dashboard.

   a) Click **Dashboard**.

   b) Find the **Learning Focused Dashboard** and click **Edit**.

   c) (Optional) Enter the **Page Title** that displays under **Dashboards** menu. The default is "Learning Focused Dashboard."

   d) Select **Enable**.

   e) Click **Save**.
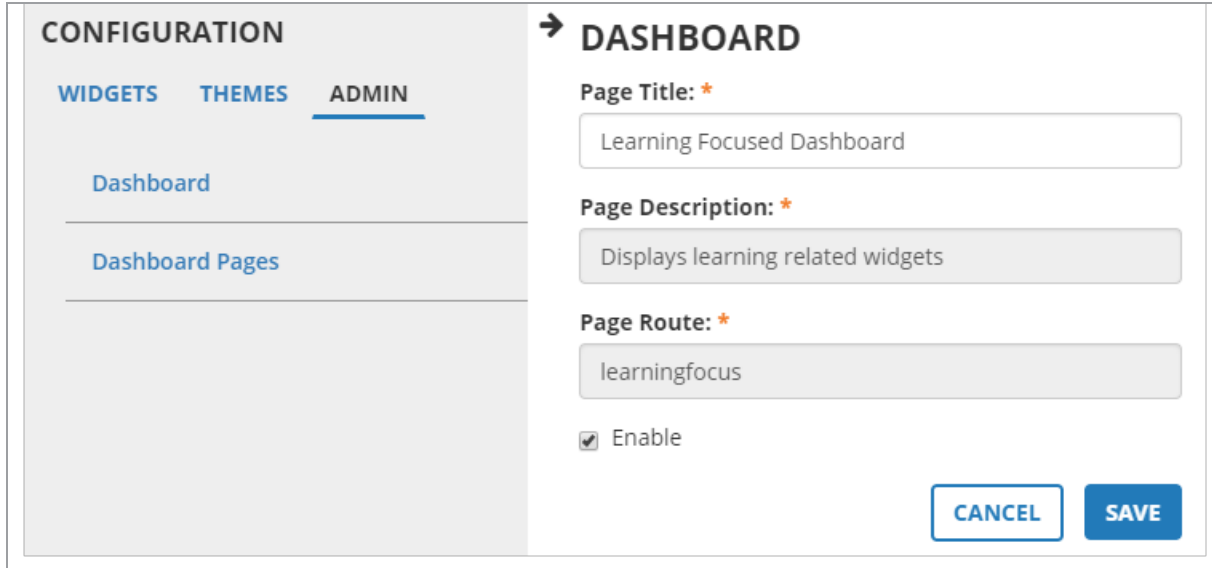


7. Enable the Learning Focused Dashboard pages.

   a) Click **Dashboard Pages**.

   b) Find **Learning Focused Dashboard** and click **Edit**.

   c) Set the dashboard's **Priority**.

**d)** Select **Enable**.

**e)** Click **Save**.



8. (Optional) On the **Dashboard Pages** tab, use the split-button to select **Security** and update dashboard permissions. Again, if you need more details on this process, see the *SumTotal Core Platform Administrator Guide*.

9. Click your browser's **Refresh** button (for example, [↻]) to refresh the page.

The Learning Focused Dashboard is now the default dashboard.

The following sections provide an overview of the widgets that come pre-loaded on the Learning Focused Dashboard. Remember that you and your learners can customize the widgets that display as needed. For complete details on all available widgets, see the *SumTotal Core Platform Administrator Guide*.

## Search

The Search widget allows you to quickly search for learning activities, such as courses, videos, or books. It works just like Enterprise Search, except it's always set to the **Learning** search type.

> *Tip: If you want to search for a different object (like **People** or **Navigation** items), click [🔍] and use the full Enterprise Search instead.*
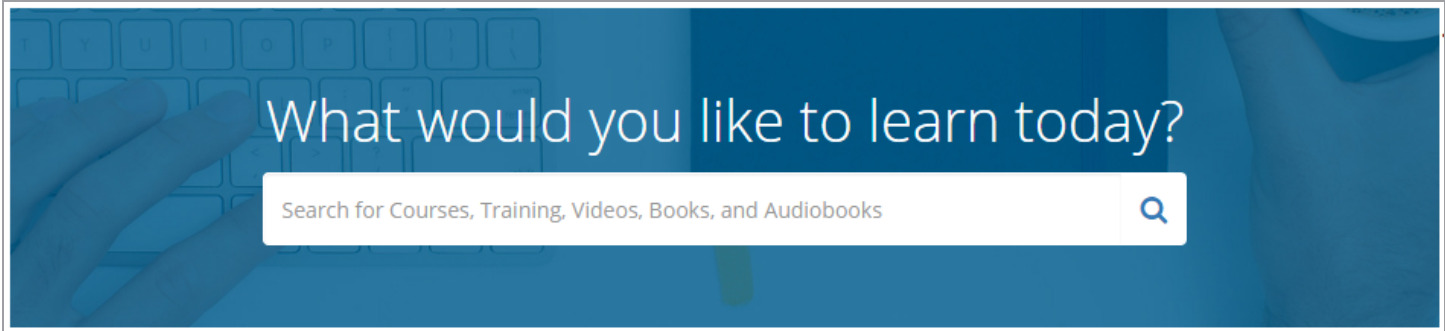
When you start typing, a drop-down appears that suggests the names of activities that most closely match your keywords. You can click on one of these suggestions to go straight to that activity, or press **Enter** to see the full list of results on the Enterprise Search main page.

- *For more on searching for activities and other objects, see Using Enterprise Search.*

## My Learning

View a summary of your current learning assignments organized by type.



The **Training Activities** circle graphic displays the total number of tasks (assigned, registered, and/or in-progress). The list beside the graphic breaks your assignments down into task types:

- **Critical**: All assigned or registered activities, certifications, and/or recertifications with either upcoming or past deadlines within the "critical" time frame as defined by your administrator. For example, upcoming activities may appear in your Critical view 10 days before they are due and 30 days after they become overdue.

- **Assigned:** Assigned training that the user has not yet registered for or started. Once the user registers or launches the activity, it moves to the Upcoming or Current task type.

- **Current**: Any (1) registered activity with a start date equal to or earlier than the current date, or (2) any in-progress activity without a start date (such as online courses or documents).

- **Upcoming**: Any registered activity with a start date occurring after the current date.

- **Required Certifications**: Assigned certifications and recertifications that the learner needs to complete (either by the due date or expiration date).

Only current enrollments and open requirements display. The widget does not show completed training or acquired certifications unless they are decertified, expired, or due to expire within a critical training time frame.

From here, you can click the **My Learning** graphic or a specific task type to view the corresponding filter in your Timeline (for example, if you click **Critical** in the widget, it sends you to the Timeline's **Learn > Critical** tab).

> *Note: Timeline tabs and filters are customizable and may not all display. If the **Learn** tab is hidden, the Timeline opens to the **All > Total** tab. If a Learning Management filter (such **Past Due**) is hidden, the Timeline opens to the **Learn > Total** filter.*

From the Timeline, you can use the split-button to perform available tasks (such as **Start** or **Register**).

**Understanding Activity Counts on the My Learning widget:**

This widget works a lot like the Timeline. Keep in mind the following:

- The **Training Activities** "total" count isn't necessarily the sum total of all the task type counts. This is because activities may display simultaneously under different task types.

  For example, if an online course is assigned and registered, it displays under both **Assigned** as "1" AND **Current** as "1." If you added the counts together, you'd get 2. However, the **Training Activities** count is looking at the total number of activities, so it would also read "1."

- When working with activities that have "child" activities, such as a curriculum, the "assigned" task types only count the parent activity, but the "registered" task types count the parent activity AND all of its children that you've registered for.

  For example, if you've been assigned a curriculum with four online courses and you register for all four of them, your **Assigned** count reads "1" (just the curriculum) and your **Current** count reads "5" (the curriculum and its four activities).

- Within a single task type, the widget only counts an activity once. For example, if the same online course is part of two different curricula you're registered for, the **Current** count would consider that "1," not "2."

# Resume Learning

This widget displays up to 10 recent online activities (such as a course, document, or video) that you've started but not yet completed so you can quickly pick up where you left off.
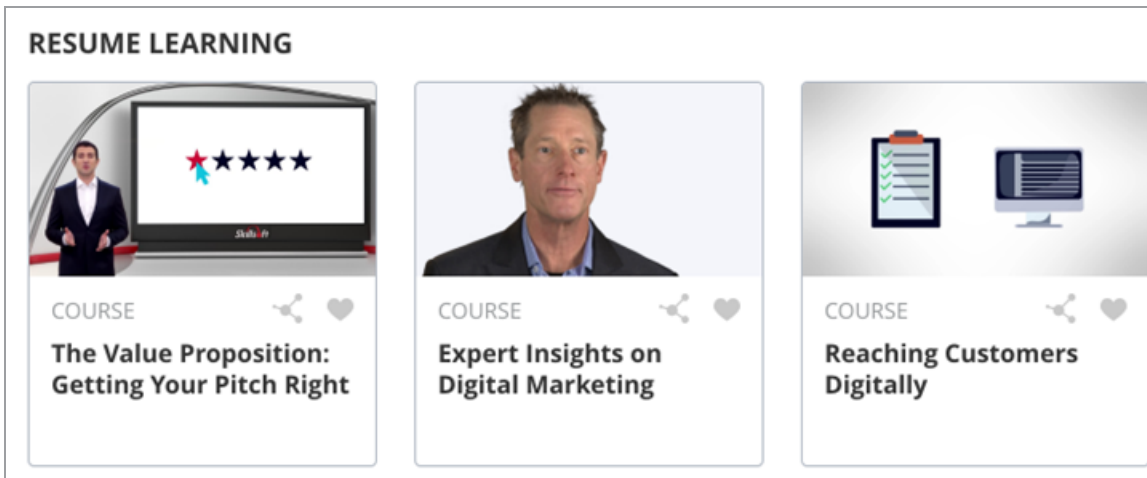


From here, you can:

- Click **View Details** to go to the activity details page, where you can re-launch the activity.

- Click the empty heart icon ♡ to add the activity to your favorites so you can quickly find it again later (if the heart is full 💙, it's already favorited).

- Click ⤴ to open the **Share Activity** popup. From here, you can click **Copy Link** to copy the activity's direct URL and paste it wherever needed (such as an email or direct message). This feature is not supported on the iPad.

# My Favorites

View any learning activities you have marked as a favorite. If your company has enabled custom playlists, these items also display on your **Favorite Playlist**. Otherwise they display on your **Favorites** page

This widget displays up to 20 activities in order of how recently you favorited them (from most to least recent).

## MY FAVORITES



View all >

| COURSE ♥ | DOCUMENT ♥ | CURRICULUM > |
|---|---|---|
| **Company Policies** | **Employee Handbook** | **Onboarding Curriculum** |
| REGISTER | REGISTER | RE |

From here, you can:

- Click the activity name to view a slide-out summary.

- Click the **full heart icon** ♥ to remove the item from your Favorites list. Note that the item won't disappear from the widget until you refresh your dashboard.

- Click the available option (**View Details**, **Register**, or **Start**). Learning Management automatically updates this button based on the actions you can perform. For example, if you already registered for the activity, **Start** displays.

## Recommended Activities

Depending on settings configured by your administrator, you can view and manage recommended learning activities based on your personal interests and needs. In addition to dashboards, this widget may also display on the Enterprise Search, Library, Goals, and Performance pages, depending on administrative settings.

> *Tip*: *Don't see any recommendations? Click **Edit Interests** to set your preferences.*

From here, you can:

- Click the activity name to view a summary.

- Click the empty heart icon ♡ to add the activity to your favorites so you can quickly find it again later (if the heart is full ♥, it's already favorited).

- Click ⌣ to open the **Share Activity** popup. From here, you can click **Copy Link** to copy the activity's direct URL and paste it wherever needed (such as an email or direct message). This feature is not supported on the iPad.

- Use the dynamic link at the bottom to perform the next available action (such as **Start** or **Register**). This link changes depending on where you are in the activity workflow.

- Depending on system settings, you may see "modality" tabs (such as Read or Watch). You can click one to narrow the list based on how you interact with the activity.

- Click **Edit Interests** to customize your recommendations.

## Manage Interests

> *Note*: *While only the **Recommended Activities** widget comes pre-loaded into the Learning Focused Dashboard, managing interests applies to both it **and** the **My Interests** widget. As such, you'll see references*

*to both below. For more on the **My Interests** widget, see the SumTotal Core Platform Administrator Guide.*

You can customize the activities that display on your **My Interests** and **Recommended Activities** widgets.

You can update your interests from either widget. Changes made to one widget affect them all. For example, if you update your interests from the **My Interests** widget on your dashboard, the **Recommended Activities** widget that displays in Enterprise Search updates to reflect these new preferences as well.

*Note: If your administrator disabled this feature, you can still add the widget to your dashboard, but you can't set preferences. Administrators should refer to the SumTotal Learning Management System Administrator Guide for more information on customizing these widgets.*

1.   Click **Edit Interests**.

**MY INTERESTS**

No recommendations found...
Want to see learning content relevant to your goals and interests? We just need a little information to begin.

NO THANKS        EDIT INTERESTS
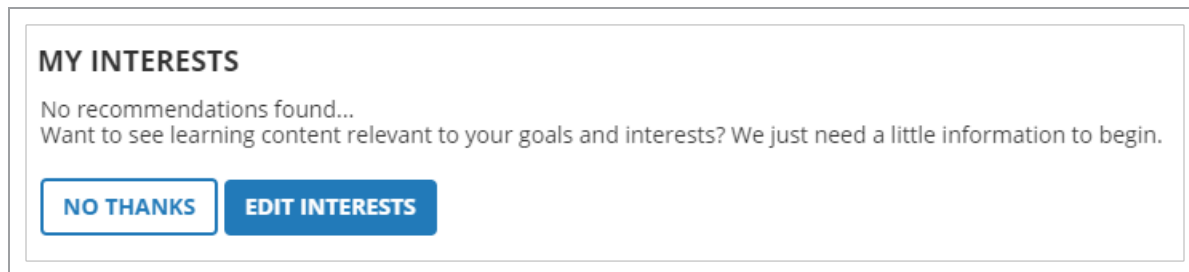
*Note: When first setting up preferences, you also have the option to click **No Thanks** to remove the section. It displays again the next time you navigate to the page.*

The **Manage Interests** slide-out displays.
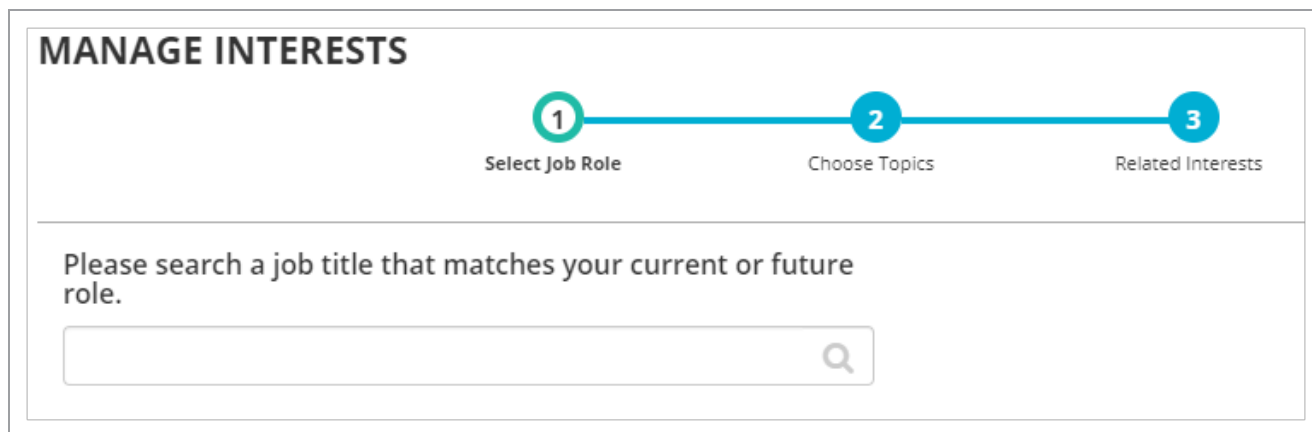
**MANAGE INTERESTS**

①——②——③
Select Job Role   Choose Topics   Related Interests

Please search a job title that matches your current or future role.

1.  On the **Select Job Role** step, choose what you want to do.

    ▶   If there's already a job selected, you'll see a section that says **Is your current job role [Title]?** If you want to keep this selection, click **Yes! Move to the Next Step** to keep this job selected.

    ▶   If you don't yet have a job selected OR you want to change your job, enter a new job in the **Please search a job** field.

    Once you begin typing, existing job titles display in a drop-down for you to select. If you select a new job, your recommendations will update to reflect activities required by that job.

    If you do not wish to include a future job, you may skip this step.

2.  Click **Next**.

3.  In the **Choose Topics** step, select the topics you are interested in from the available list. If there are a lot of topics to choose from, you can enter keywords in the **Filter** field.



4.  Click **Next**.

5.  (If applicable) In the **Related Interests** step, select any subtopics that you are interested in from the available list. The list is based on the topics you chose in the previous step.

    You can select from the top two levels of subtopics (in other words, the topic's subtopics and sub-subtopics). If a subtopic has subtopics, then you'll see the name of those second-level subtopics with the first-level subtopic in parentheses next to it. For example, in the below image, "Digital Transformation" is in parentheses because it's the first-level subtopic.

6.  Click **Next**.

> You have successfully set your interests. The system will use your Job Role and/or Topic interests to suggest learning activities to help you pursue your goals.

7.  Click **Close**.

Your widgets update to reflect your customized interests. The widgets don't include activities you've already registered for, started, or completed.

# Working with Advanced Reporting

If your company uses Advanced Reporting, you can create ad hoc reports for Skillsoft PES content with the **Activity - Provider** tables under the **Learning** and **Learning - Skill and Competency** Domains. For example, you could filter activities using **Provider Code**: PERCIPIO.

*   *For detailed information on building reports, see the SumTotal Reporting & Analytics 19.2 User Guide.*

sumtotal®

When building your reports, keep the following considerations in mind:

- You can get reports on Skillsoft PES activities individually, but you cannot group the usage of the activities based on the Skillsoft PES channel.

- Learning Management does not track individual micro videos, so micro video completions are not included in any reports run in SumTotal.

# Appendix: Skillsoft PES Quick Reference

While it's assumed that users accessing this guide already have a working knowledge of SumTotal and Skillsoft PES products, in order to ensure that users understand the relationship between the two systems, we have provided a quick reference guide for Skillsoft PES content accessible through SumTotal.

| Skillsoft PES Term | Definition |
|---|---|
| Area | A way to group activities by category for ease of access.<br><br>In Learning Management, they're mapped to **Library topics**. You can view them from the **Manage Library** page, but they're not editable. |
| Asset Bin | When Skillsoft PES content is imported into Learning Management, it's divided into seven asset bins: Course, Book, Audio Book, Book Summary, Audio Book Summary, TestPrep, Practice Lab, and PES Content (Default).<br><br>The asset bins relate to content types in Percipio, except for PES Content (Default). The PES Content (Default) asset bin contains all imported content (except channels) that doesn't fit under the other asset bins.<br><br>In Learning Management, each asset bin is mapped to an **activity type**. You can select the activity types when configuring the integration. See **Integrate with Skillsoft PES** (on page 22) for instructions.<br><br>Channels are considered separate from content and are automatically mapped to the "bundle" activity type. |
| Channel | A group of activities that learners can access all at once.<br><br>In Learning Management, they're mapped to the **bundle** activity type. You can access channels from the **Activity Management** page. Some properties are editable while others are locked. See **Available Activity Properties** (on page 38) for details. |
| Collection | A selection of activities and bundles that a customer can license in Skillsoft PES. Learning Management imports all licensed content during the sync as either individual activities or bundles (channels). |

| Skillsoft PES Term | Definition |
|---|---|
| Content | An individual piece of training, such as a video or a book.<br><br>In Learning Management, they're mapped to **activities**. The activity type may vary depending on the type of content. See "Asset Bin" for more.<br><br>You can access content from the **Activity Management** page. Some properties are editable while others are locked. See **Available Activity Properties** (on page 38) for details. |
| Content Type | Another name for asset bins. See "Asset Bin" for more. |
| Dimension | Filters used within channels (bundles) to help learners narrow their selection. For example, there could be an "Expertise" dimension with the values Beginner, Intermediate, and Expert.<br><br>Dimensions display on the channel page in Percipio. Learners go to this page when they view the bundle's details in Learning Management. They are similar to Learning Management activity filters but display in different areas. See **Understanding Dimensions and Activity Filters** (on page 41) for more. |
| License Pool | The number of "seats" a customer licenses for a collection. License pools have an expiration date and a fixed number of licenses, which determines how long the license is valid and how many users can access the associated content.<br><br>In Learning Management, these are mapped to audiences from the **Skillsoft PES License Pools** page. See **Associate Skillsoft PES License Pools to Learning Management Audiences** (on page 32) for instructions. |
| Micro Videos | A shorthand for micro-learning videos (below). |
| Micro-Learning Videos | Many Skillsoft PES courses are divided into digestible "chunks" called micro-learning videos. These are not individual activities, but instead parts of an imported course.<br><br>In Learning Management, they're imported as **Videos**. Administrators can't access or edit them, but you can choose to make them available in Enterprise Search to learners. See **Understanding Micro Videos** (on page 42) for details. |

sumtotal®

| Skillsoft PES Term | Definition |
|---|---|
| Modality | A filter based on how content is consumed. Skillsoft PES imports four modalities: Read, Watch, Listen, and Practice. |
| | In Learning Management, they're mapped to the Read, Watch, Listen, and Practice **modality filters**. Modalities display as tabs on the Enterprise Search results and the Library. Skillsoft PES modalities are not editable in Learning Management. |
| Subject | A sub-division of an Area. |
| | In Learning Management, they're mapped to **Library subtopics**. You can view them from the **Manage Library** page, but they're not editable. |

sumtotal®