



Enhance Administrative Search Pages Requirements

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Requirements

The goal of this project is to create a simple, intuitive, icon-driven workflow for system administrators. This project will be implemented in five phases:

- I. Make each “Search Feature” page into a “Feature” landing page with new look, behavior, and action buttons. Update left navigation menu to reflect new page titles.
- II. Enhance “Add Record” pages with new look and feel; add a “Cancel” button.
- III. Design the new “Administration” page with an interactive workflow wheel. Add a single-select type ahead tool that allows admins to save “My Favorite Pages”. Add links to LMS Support Resources.
- IV. Update record management pages (edit and configuration) with new navigation tabs and/or action buttons.
- V. Replace current “My Learning Center” with two simpler, icon-based navigation menus: Configuration Tools and Operational Tools

Page Standards

- a. Each page will support user specific cultural date formatting
- b. Each page will support language preferences, including: English, English – United Kingdom, English – Australian, Chinese – China, Francias – Canada, Italian – Italy, Portuguese – Brazil, Espanol – Mexico
- c. All pages will use the new standard user interface page template with the common header.
- d. Any new CSS stylings will be added to a global baseline stylesheet. No new stylings will be added to stylesheet.css or stylesheet-responsive.css
- e. div#wrapper controls the width of each page
- f. Ensure pages support User Impersonation functionality.
- g. Pages continue to support Organization and Position Branding.
- h. Help Text will point to HTML content that exists today.
- i. Retain current role access to each “Add/Edit Feature” page according to portal XML files.
- j. Modify the browser page name (that appears in the browser tabs) to match the displayed page name on all pages
- k. Below is a table of the default feature management setting in the LMS that needs to be supported for the new +Object button.

Tool	Guest	Students	Location Manager	Location Admin	Instructor	Admin	Portal Admin	Setup Admin
Pending Enrollment					X	X	X	X
Pending Interest					X	X	X	X
Pending Registration					X	X	X	X
Search Certifications						X	X	X
Search Courses		X	X	X	X	X	X	X
Add Course							X	X

Search Offerings	x	x	x	x	x	x	x
Add Offering			x	x	x		x
Locations					x	x	x
Search User Group			x	x	x		x
Add User Group						x	x
Search Organization					x	x	x
Add Organization						x	x
Search Resources	x	x	x	x	x	x	x
Add Resource						x	x
Search Categories	x	x	x	x	x	x	x
Add Category						x	x
Search User				x	x	x	x
Add User						x	x
Quick Profile Update				x	x	x	x
Search Instructor				x	x	x	x
Add Instructor						x	x

Make "Search Feature" Pages into New "Feature" Pages

Update all existing ASPX pages with the clean look and feel of version2.aspx pages, but retain "My Learning Center" navigation menu. Rename page content fields to make record search and management more uniform. Improve usability by reordering/regrouping fields on filter and result pages.

course_search.aspx > Course Catalog

1. Page Title
 - a. Rename page title from "Search Courses" to "Course Catalog"
 - b. Remove expand/collapse image
 - c. Remove description text
2. Filters
 - a. Rename "Search" header to "Filter"

- b. Rename “Course Name and Description” to “Keyword”.
 - c. Remove “Additional Filters” label
 - d. Remove “Course Topic(s)” field
 - e. Rename “Course Organization” to “Catalog”
 - f. Move “Subscription” option “Both” to bottom of list
 - g. Rename “Search” button to “Apply Filters”
3. Results
 - a. Rename column header from “Name and Description” to “Course”
 4. New Functionality
 - a.
 - b. Execute default search and display results on page load
 - c. On top right corner of page, add new “+ Course” button that opens Add Course (course_add.aspx) page on click

offering_search.aspx > Course Offerings

1. Page Title
 - a. Rename page title from “Search Offerings” to “Course Offerings”
 - b. Remove expand/collapse image
 - c. Remove description text
2. Filters
 - a. Move “Offering Number” field above filter control, so that it persists on results page (same as User Search)
 - b. Rename “Search” header to “Filter”
 - c. Pull all filter options from “Additional Filters” section into the “Filters” control. Do NOT bring site text (You may refine... OR... You may refine... OR), just fields. Display all available filters (by role) on “Filter” click.
 - d. Move “Status” field to top of filter list.
 - e. Remove “Additional Filters” section from page.
 - f. Rename “Search” button to “Apply Filters”
3. Results
 - a. Remove description text “Use the Action links to view/edit the offering or view/manage enrollments for the offering.”
 - b. Rename column header from “Course Name” to “Course”
4. New Functionality
 - a. Execute default search and display results on page load.
 - b. On top right corner of page, add new “+ Offering” button that opens Add Offering (offering_add.aspx) page on click.

category_list.aspx > Majors

1. Page Title
 - a. Rename page title from “Search Majors” to “Majors”
 - b. Remove expand/collapse image on page title
 - c. Remove page title description text
2. Filters
 - a. Rename “Search” header to “Filter”
 - b. Rename “Major Name” to “Major”
 - c. Rename “Search” button to “Apply Filters”
3. New Functionality:
 - a. Add “Code” field that queries Major Codes and returns matching results.
 - b. Execute default search and display results on page load.
 - c. On top right corner of page, add new “+ Major” button that opens Add Major (category_add.aspx) page on click.

subscription_search.aspx > Subscriptions

1. Page Title
 - a. Rename page title from “Search Subscriptions” to “Subscriptions”
 - b. Remove expand/collapse image on page title
 - c. Remove page title description text
2. Filters
 - a. Rename “Search” header to “Filter”
 - b. Rename “Subscription Code” to “Code”.
 - c. Rename “Subscription Name” to “Subscription”. Move to top of filter list.
 - d. Rename “Search” button to “Apply Filters”
3. Results
 - a. Rename “Name” column header to “Subscription”
4. New Functionality
 - a. Execute default search and display results on page load.
 - b. On top right corner of page, add new “+ Subscription” button that opens Add Subscription (subscription_add.aspx) page on click.

taxonomy_search.aspx > Topics

1. Page Title
 - a. Rename page title from “Search Topics” to “Topics”
 - b. Remove expand/collapse image on page title
 - c. Remove page title description text
2. Filters
 - a. Rename “Search” header to “Filter”
 - b. Rename “Name” field to “Topic”
 - c. Rename “Search” button to “Apply Filters”
3. New Functionality
 - a. Execute default search and display results on page load.
 - b. On top right corner of page, add new “+ Topic” button that opens Add Topic (taxonomy_add.aspx) page on click.

Distribution/pages/list.aspx > Offering Distributions

1. Page Title
 - a. Rename page title from “Search Shared Offering Distributions” to “Offering Distributions”
 - b. Remove expand/collapse image on page title
 - c. Remove page title description text
2. Filters
 - a. Rename “Search” header to “Filter”
 - b. Rename “Name” field to “Distribution”
 - c. Rename “Search” button to “Apply Filters”
3. Results
 - a. Rename column header from “Name” to “Distribution”
4. New Functionality
 - a. Execute default search and display results on page load.
 - b. On top right corner of page, add new “+ Distribution” button that opens Add Offering Distribution (distribution_add.aspx) page on click.

resource_search.aspx > Resource Library

1. Page Title
 - a. Rename page title from “Search Resources” to “Resource Library”
 - b. Remove expand/collapse image on page title
 - c. Remove page title description text
2. Filters

- a. Rename “Search” header to “Filter”
- b. Rename “Search” button to “Apply Filters”
3. Results
 - a. Rename column header from “Resource Name” to “Resource”
4. New Functionality
 - a. Suggested Enhancement (<https://www.latitudelearning.com/r-d/lms-roadmap-enhancements/article/1380043/improve-resource-search-results>): Expand keyword field to search name and description. Use same query weights for sort order as Course Catalog > Keyword Search field.
 - b. Execute default search and display results on page load.
 - c. On top right corner of page, add new “+ Resource” button that opens Add Resource (resource_add.aspx) page on click.

ResourceCategory_List.aspx > Resource Categories

1. Page Title
 - a. Rename page title from “Search Categories” to “Resource Categories”
 - b. Remove expand/collapse image on page title
 - c. Remove page title description text
2. Filters
 - a. Rename “Search” header to “Filter”
 - b. Rename “Name” field to “Category”
 - c. Rename “Search” button to “Apply Filters”
3. Results
 - a. Rename column header “Name” to “Category”
4. New Functionality
 - a. Execute default search and display results on page load, with “Filters” section collapsed.
 - b. Add column “Searchable” that displays Yes/No for each record.
 - c. On top right corner of page, add new “+ Resource Category” button that opens Add Category (category_add.aspx) page on click.

programyear_list.aspx > Training Programs

1. Page Title
 - a. Rename page title from “Search Programs” to “Training Programs”
 - b. Remove expand/collapse image on page title
 - c. Remove page title description text
2. Filters
 - a. Rename “Search” header to “Filter”
 - b. Rename “Program Name” to “Program”
 - c. Rename “Search” button to “Apply Filters”
3. Results
 - a. Rename column header “Program” to “Program Number”
 - b. Rename column header “Program Name” to “Program”
4. New Functionality
 - a. Add “Status” filter with radio button options: Active, Inactive, Both. Default value: “Active”
 - b. Execute default search and display results on page load.
 - c. On top right corner of page, add new “+ Program” button that opens Add Program (programyear_add.aspx) page on click.

category_type_list.aspx > Skill Profiles

1. Page Title
 - a. Rename page title from “Search Skill Profiles” to “Skill Profiles”
 - b. Remove expand/collapse image on page title
 - c. Remove page title description text
2. Filters

- a. Rename “Search” header to “Filter”
- b. Rename “Skill Profile Name” to “Skill Profile”
- c. Rename “Search” button to “Apply Filters”
3. New Functionality
 - a. Execute default search and display results on page load.
 - b. Replace current “Active” results column with “Status” column. Cell values: Active/Inactive
 - c. On top right corner of page, add new “+ Skill Profile” button that opens Add Skill Profile (category_type_add.aspx) page on click.

cert_base_list.aspx > Generic Rules

1. Page Title
 - a. Rename page title from “Search Generic Rules” to “Generic Rules”
 - b. Remove expand/collapse image on page title
 - c. Remove page title description text
2. Filters
 - a. Rename “Search” header to “Filter”
 - b. Rename “Name” field to “Rule”
 - c. Hide “Owner Organization” field (Portal Code is display only, not useful)
 - d. Rename “Search” button to “Apply Filters”
3. Results
 - a. Rename column header “Name” to “Generic Rule”
4. New Functionality
 - a. Execute default search and display results on page load.
 - b. On top right corner of page, add new “+ Generic Rule” button that opens Add Generic Rule (cert_base_properties_edit.aspx) page on click.

cert_aggregate_list.aspx > Primary Rules

1. Page Title
 - a. Rename page title from “Search Primary Rules” to “Primary Rules”
 - b. Remove expand/collapse image on page title
 - c. Remove page title description text
2. Filters
 - a. Rename “Search” header to “Filter”
 - b. Rename “Name” field to “Rule”
 - c. Hide “Owner Organization” field (Portal Code is display only, not useful)
 - d. Rename “Search” button to “Apply Filters”
3. Results
 - a. Rename column header “Name” to “Primary Rule”
4. New Functionality
 - a. Add new filter option “Rule Type” which allows radio button selections: All Of, One Of, Both. Default value: Both
 - b. Execute default search and display results on page load.
 - d. On top right corner of page, add new “+ Primary Rule” button that opens Add Primary Rule (cert_aggregate_edit.aspx) page on click.

cert_list.aspx > Certifications

1. Page Title
 - a. Rename page title from “Search Certifications” to “Certifications”
 - b. Remove expand/collapse image on page title
 - c. Remove page title description text
2. Filters
 - a. Rename “Search” header to “Filter”
 - b. Rename “Name” field to “Certification”
 - c. Hide “Owner Organization” field (Portal Code is display only, not useful)

- d. Remove “Category” label
 - e. Rename “Category” field to “Skill Area”
 - f. Rename “Search” button to “Apply Filters”
3. Results
 - a. Rename column header “Name” to “Certification”
 - b. Remove “Type” column
 4. New Functionality
 - a. Execute default search and display results on page load.
 - b. On top right corner of page, add new “+ Certification” button that opens Add Certification (admin/cert_rule_set_edit.aspx) page on click.

brand_list.aspx > Brands

1. Page Title
 - a. Rename page title from “Search Brands” to “Brands”
 - b. Remove expand/collapse image on page title
 - c. Remove page title description text
2. Filters
 - a. Rename “Search” header to “Filter”
 - b. Rename “Name” field to “Brand”. Move to top of filter list.
 - c. Rename “Search” button to “Apply Filters”
3. Results
 - a. Rename column header “Name” to “Brand”
4. New Functionality
 - a. Execute default search and display results on page load.
 - b. On top right corner of page, add new “+ Brand” button that opens Add Brand (brand_add.aspx) page on click.

hr/admin/org/list.aspx > Organizations

1. Page Title
 - a. Rename page title from “Search Organizations” to “Organizations”
 - b. Remove expand/collapse image on page title
 - c. Remove page title description text
2. Filters
 - a. Rename “Search” header to “Filter”
 - b. Rename “Name” field to “Organization”
 - c. List the following fields in filter control: City, Country, State/Province
 - d. Remove “Additional Filters” control.
 - e. Rename “Search” button to “Apply Filters”
3. Results
 - a. Rename column header “Organization Name” to “Organization”
 - b. Update column order: Code, Organization, Type...
4. New Functionality
 - a. Execute default search and display results on page load.
 - b. On top right corner of page, add new “+ Organization” button that opens Add Organization (organizationAdd.aspx) page on click.

dealers/admin/list.aspx > Locations

1. Page Title
 - a. Rename page title from “Search Locations” to “Locations”
 - b. Remove expand/collapse image on page title
 - c. Remove page title description text
2. Filters
 - a. Rename “Search” header to “Filter”
 - b. Rename “Name” field to “Location”. Move to top of filter list.

- c. Rename "Location Code" field to "Code"
 - d. Rename "Search" button to "Apply Filters"
3. Results
 - a. Rename column header "Name" to "Location"
4. New Functionality
 - a. Execute default search and display results on page load.

Building_list.aspx > Facilities

1. Page Title
 - a. Rename page title from "Search Facilities" to "Facilities"
 - b. Remove expand/collapse image on page title
 - c. Remove page title description text
2. Filters
 - a. Rename "Search" header to "Filter"
 - b. Rename "Name" field to "Facility". Move to top of filter list.
 - c. Remove "Other Filters" label and list all those options above "Physical Address" label
 - d. Rename "Search" button to "Apply Filters"
3. Results
 - a. Rename column header from "Name" field to "Facility".
 - b. Fix spacing issue by shrinking the "Directions" column and equally distributing the space to other columns.
4. New Functionality
 - a. Execute default search and display results on page load.
 - b. Only display "Google Maps" link results for facilities that have a Physical Address.
 - c. On top right corner of page, add three new buttons.
 - i. "+ Facility" button opens Add Facility (Building_Add.aspx?sURL=~/home/admin/main.aspx) page.
 - ii. "+ Room" button opens Add Room (facility/admin/Room_Edit.aspx?sURL=~/home/admin/main.aspx) page.
 - iii. "+ Equipment" button opens Add Equipment (facility/admin/Equipment_Edit.aspx?sURL=~/home/admin/main.aspx) page.

position_search.aspx > Positions

1. Page Title
 - a. Rename page title from "Search Positions" to "Positions"
 - b. Remove expand/collapse image on page title
 - c. Remove page title description text
2. Filters
 - a. Rename "Search" header to "Filter"
 - b. Rename "Name" field to "Position"
 - c. Rename "Search" button to "Apply Filters"
3. Results
 - a. Rename column header from "Name" to "Position"
4. New Functionality:
 - a. Add new drop-down menu filters, with active records listed. Both default to <<ALL>>
 - i. Department
 - ii. Position Group
 - b. Execute default search and display results on page load.
 - c. On top right corner of page, add new "+ Position" button that opens Add Position (position_add.aspx) page on click.

position_group_search.aspx > Position Groups

1. Page Title
 - a. Rename page title from "Search Position Groups" to "Position Groups"

- b. Remove expand/collapse image on page title
 - c. Remove page title description text
2. Filters
 - a. Rename “Search” header to “Filter”
 - b. Rename “Name” field to “Position Group”
 - c. Rename “Search” button to “Apply Filters”
3. Results
 - a. Rename column header from “Name” to “Position Group”
4. New Functionality
 - a. Execute default search and display results on page load.
 - b. On top right corner of page, add new “+ Position Group” button that opens Position Groups (position_group_edit.aspx) page on click.

position_group_search.aspx?groupType=2 > Departments

1. Page Title
 - a. Rename page title from “Search Departments” to “Departments”
 - b. Remove expand/collapse image on page title
 - c. Remove page title description text
2. Filters
 - a. Rename “Search” header to “Filter”
 - b. Rename “Name” field to “Department”
 - c. Rename “Search” button to “Apply Filters”
3. Results
 - a. Rename column header from “Name” to “Department”
4. New Functionality:
 - a. Execute default search and display results on page load.
 - b. On top right corner of page, add new “+ Department” button that opens Add Department (position_group_edit.aspx?groupType=2) page on click.

hr/admin/group/list.aspx > User Groups

1. Page Title
 - a. Rename page title from “Search User Groups” to “User Groups”
 - b. Remove expand/collapse image on page title
 - c. Remove page title description text
2. Filters
 - a. Rename “Search” header to “Filter”
 - b. Rename “Group Name” to “Group”
 - c. Rename “Search” button to “Apply Filters”
3. New Functionality
 - a. Execute default search and display results on page load.
 - b. On top right corner of page, add new “+ User Group” button that opens Add User Group (hr/admin/group/add.aspx) page on click.

listaudience.aspx > Audiences

1. Page Title
 - a. Rename page title from “Search Audience” to “Audiences”
 - b. Remove expand/collapse image on page title
 - c. Remove page title description text
2. Filters
 - a. Rename “Search” header to “Filter”
 - b. Rename “Audience Name” to “Audience”
 - c. Rename “Search” button to “Apply Filters”
3. Results
 - a. Rename column header “Audience Name” to “Audience”

- b. Make “Action” column values consistent: View/Edit
4. New Functionality
 - a. Execute default search and display results on page load.
 - b. On top right corner of page, add new “+ Audience” button that opens Add Audience (addaudience.aspx) page on click.

UserSearch.aspx > Users

1. Page Title
 - a. Rename page title from “Search Users” to “Users”
 - b. Remove expand/collapse image on page title
 - c. Remove page title description text
2. Filters
 - a. Rename “Advanced Search” header to “Filter”
 - b. Rename “Search” button to “Apply Filters”. Make it left aligned, like every other feature page.
3. Results
 - a. Reorder columns: Name, Username, Position, Role, Location, Action
 - b. Rename action buttons: Edit Account, Edit Profiles, Impersonate
4. New Functionality
 - a. Replace “Username” criteria with single-select type ahead criteria “User”. Rename action buttons: Edit Account, Edit Profiles, Impersonate
 - b. Execute default search and display results on page load.
 - c. On top right corner of page, add new “+ User” button that opens Add User (hr/admin/user/add.aspx) page on click.

registration/admin/approve_list.aspx > Pending Enrollments

1. Page Title
 - a. Rename page title from “Approve Pending Enrollments” to “Pending Enrollments”
 - b. Remove expand/collapse image on page title
 - c. Remove page title description text
2. Filters
 - a. Rename “Search” header to “Filter”
 - b. Rename “Search” button to “Apply Filters”
3. Results
 - a. Rename column header “Name” to “User”
 - b. Rename column header “Course Name” to “Course”
 - c. Change “Course Start” to Meeting Date”
 - d. Rename “Tuition (\$)” to “Tuition (USD)”
4. New Functionality
 - a. Execute default search and display results on page load.

interests/admin/interest_list.aspx > Pending Interests

1. Page Title
 - a. Rename page title from “Approve Pending Interests” to “Pending Interests”
 - b. Remove expand/collapse image on page title
 - c. Remove page title description text
2. Filters
 - a. Rename “Search” header to “Filter”
 - b. Rename “Search” button to “Apply Filters”
3. Results
 - a. Rename column header “Course Name” to “Course”
4. New Functionality
 - a. Execute default search and display results on page load.

approve_selfregistration.aspx > Pending Registrations

1. Page Title
 - a. Rename page title from “Approve Pending Registrations” to “Pending Registrations”
 - b. Remove expand/collapse image on page title
 - c. Remove page title description text

quick_user_list.aspx > User Profile Editor

1. Page Title
 - a. Rename page title from “Quick Profile Search” to “User Profile Editor”
 - b. Remove expand/collapse image on page title
 - c. Remove page title description text
2. Filters
 - a. Rename “Search” header to “Filter”
 - b. Rename “Search” button to “Apply Filter”
3. Results
 - a. Update column order: Name, Username, Role, Location
 - b. Rename action button from “Edit User Profile” to “View Profile”
4. New Functionality
 - a. Execute default search and display results on page load.

instructor_list.aspx > Instructors

1. Page Title
 - a. Rename page title from “Search Instructors” to “Instructors”
 - b. Remove expand/collapse image on page title
 - c. Remove page title description text
2. Filters
 - a. Rename “Search” header to “Filter”
 - b. Rename “Name” to “User”
 - c. Rename “Search” button to “Apply Filters”
3. Results
 - a. Add “Status” column with values: Active/Inactive
4. New Functionality
 - a. Execute default search and display results on page load.
 - b. On top right corner of page, add new “+ Instructor” button that opens Add Instructor (instructor_add.aspx) page on click.

Discount_Search.aspx > Coupon Campaigns

1. Page Title
 - a. Rename page title from “Search Discounts” to “Coupon Campaigns”
 - b. Remove expand/collapse image on page title
 - c. Remove page title description text
2. Filters
 - a. Rename “Search” header to “Filter”
 - b. Rename “Name” field to “Campaign”
 - c. Rename “Amount” field to “USD Amount”
 - d. Rename “Search” button to “Apply Filters”
3. Results
 - a. Rename column header from “Name” to “Campaign”
 - b. Rename column header “Amount” to “USD Amount”
4. New Functionality
 - a. Execute default search and display results on page load.
 - b. On top right corner of page, add new “+ Campaign” button that opens Add Coupon Campaign (Discount_Add.aspx) page on click.

interest_summary.aspx > Course Interest Summary

Now that we have released a Batch Enroll Others tool, Interest List should return to its original function of gauging Classroom/Virtual Classroom course interest and auto-enrolling students as offerings become available. That being said, we want it to fit into the new Administrator Workflow as well, instead of remaining an outlier admin tool.

1. Page Title
 - l. Rename page title from “Review Interest Summary” to “Course Interest Summary”
 - m. Remove expand/collapse image on page title
 - n. Remove page title description text
2. Filter
 - a. Rename “Search” header to “Filter”
 - b. Remove asterisk from “*Language” field
 - c. Rename “Search” button to “Apply Filters”

interest_graph.aspx > Course Interest Graph

2. Page Title
 - d. Rename page title from “Review Interest Graph” to “Course Interest Graph”
 - e. Remove expand/collapse image on page title
 - f. Remove page title description text
3. Filter
 - a. Rename “Search” header to “Filter”
 - b. Remove asterisk from “*Language” field
 - c. Rename “Search” button to “Apply Filters”

Rename “My Learning Center” Links to New Page Titles

Leaving intact the existing menu structure, rename links with new page titles listed below.

Approve Pending Enrollments > Pending Enrollments

Approve Pending Interests > Pending Interests

Approve Pending Registrations > Pending Registrations

Search Generic Rules > Generic Rules

Search Primary Rules > Primary Rules

Search Position Groups > Position Groups

Search Programs > Training Programs

Search Skill Profiles > Skill Profiles

Search Courses > Course Catalog

Search Offerings > Course Offerings

Search Majors > Majors

Search Subscriptions > Subscriptions

[Search Topics > Topics](#)

[Search Brands > Brands](#)

[Search Distributions > Offering Distributions](#)

[Add Distribution > Add Offering Distribution](#)

[Search Facilities > Facilities](#)

[Search Audience > Audiences](#)

[Search User Groups > User Groups](#)

[Review Interests Summary > Course Interest Summary](#)

[Review Interests Graph > Course Interest Graph](#)

[Search Organizations > Organizations](#)

[Search Departments > Departments](#)

[Search Positions > Positions](#)

[Search Resources > Resource Library](#)

[Search Categories > Resource Categories](#)

[Add Category > Add Resource Category](#)

[Search Discounts > Coupon Campaigns](#)

[Add Discount > Add Campaign](#)

[Search Users > Users](#)

[Quick Profile Update > User Profile Editor](#)

[Search Instructors > Instructors](#)