Crowd Wisdom™ Glossary of Terms

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# CrowdWisdom

This is the name of our Learning Management System which may also be referred to as YourMembership’s LMS or YM LMS.

# LMS

LMS is short for Learning Management System.

# AMS

AMS is short for Association Management System.

# MMS

MMS is short for Membership Management System.

# Contexts

A context in Crowd Wisdom is a portal which forms settings for a client. Navigating products and settings and anything related to a client’s backend matter is impossible without setting their respective context.

# Tabs

Your Crowd Wisdom site is made up of a set of tabs. Your site will likely have the following baseline tabs:

* **Dashboard tab** - The Dashboard tab displays general information to learners. Generally, this is the landing page for the site. The Dashboard is made up of widgets, which can include static text and media, content dynamically featured by admins, learner-specific content based on existing enrollments and preferences, and externally content feeds. Admins can adjust the content of these widgets to varying degrees at any time.
* **Catalog tab** - The **Catalog** tab displays available courses to learners based on their member group and allows them to purchase subscriptions. Learners can search and filter course based on tagging systems and keywords configured by admins.
* **My Learning tab** - The **My Learning tab** displays information to learners about their enrollments. The My Enrollments section displays currently active incomplete enrollments in courses, and the Completed tab displays completed ones with earned credits and certificates.
* **Admin** **tab** - The **Admin** tab allows users with admin permissions to manage user records, build learning **products**, create catalog **offerings**, manage **enrollments**, and control/moderate other system features.

# User Accounts

The Users section of the Admin tab contains all users who have a record in the LMS. This can include users who create their own accounts, accounts that have been manually created or uploaded by admins, and, most commonly, accounts that are created through Single Sign-On (SSO) integration.

# User Roles

Roles allow you to segment user access to the system. The default role is Learner. The roles of Author, Instructor, and Report are subsets of the Admin with limited functionality to perform specific functions. You may select multiple roles for a single user by command+clicking the all of the desired roles.

* **Admin** - The admin is your highest-level user. The admin may access and edit anything within the admin tab.
* **Author** - The author is a way to segment users who can create products and catalog items. However, this functionality is not standard. Please contact your project manager if you are interested in using this role.
* **Catalog** - This feature allows further segmentation from the staff role, giving the user access to catalog items for free, but not allowing them to view test authoring in Himalaya.
* **Email** - This feature allows the user to only access the email manager. Please contact your project manager if you are interested in using this role.
* **Institute Admin** - The institute admin is a second tier admin. They may edit users’ records and transcripts, but only within their assigned institution. See Institutions for more information.
* **Instructor** - The instructor may see users’ grades and progress via the gradebook, though only within courses they are assigned to. Please note that this must be coupled with the staff role in order for the instructor to be added to a course.
* **Learner** - these are your most basic users. They do not have access to the admin tab, and may only buy and take courses. Learners will make up the majority of your users. If a role is not chosen when a user is created, the system will default to the learner role.
* **Report** - Report allows the user to access only the reporting/business intelligence tabs. This can be setup to meet your specific requirements. Please contact your project manager if you are interested in using this role.
* **Staff** - Is a hierarchy role. A user must be staff before they may be an instructor. This is to ensure the proper role is set for each user.
* **Survey** - This user type can be used to restrict the user to survey authoring. However, this functionality is not standard. Please contact your project manager if you are interested in using this role.
* **TE** **Author** - This permission must be granted in conjunction with the admin role in order to allow tests to be created. Only those tests that have been created by this user may be changed or edited by this user.
* **TE Super Author -** This user may author tests as a normal author can, however they may also edit tests that have been created by other test authors.

# Groups

Groups allow you to segment learners within learners for example member and non-member users. By assigning different groups you may create different catalogs or course offerings for specific learner groups.

# Integration

When a user signs into the LMS through Single Sign-On (SSO), the system will log them into the account with the matching unique ID (the External ID user field in the LMS). If there is not yet an account with a matching External ID, the LMS will create one automatically. Profile information can also be passed over and updated through SSO. Every time a user signs in from the system of record into the LMS, their LMS profile information fields are updated in the LMS records to match whatever is in their SSO payload. This is important to keep in mind when editing user profiles in the LMS if you are using SSO-- many fields will be overwritten if changed directly in the LMS and not in the system of record (AMS, CMS, etc.).

# Featured

The Featured function supports the Featured widget on the Crowd Wisdom dashboard. It allows specific learning products to be highlighted in rotation and can be used to promote new items or announce items with a time-limit, such as course sessions or live webinars. When a user clicks the image on the dashboard, they are linked to the description of the item in the catalog and can purchase or enroll in it at that point.

# Widget

Widgets, such as the **Freeform HTML Widget**, **Slider Widget**, and the **Quick Links Widget**, allow admins to enter static text, links, and media that will display the same for all users.

# Forums

This function enables the creation of discussion and question/answer forums. The administrator selects which forums to display on the Community pages of the user interface.

# Products

Products are the backbone of your system and consist of all of your learning items where as catalog items are the wrapping paper around your products. Types of Products:

* **Web Launch** - Web Launch products display content from a URL that you specify. Content must be supported by browsers and will display as it normally would if you were to open that same launch URL in a new tab outside of the LMS. Web Launch products do not track completion.
* **Document** - A Document product is similar to the Web Launch product, but allows for direct upload into the server that you are working on, and is limited to PDFs and Word documents (.docx). **NOTE:** generally, we recommend using the Web Launch product instead. Document products do not track completion.
* **Multimedia (JetPack 2.0)** - Multimedia products display video (.mp4) files. The **Jetpack** feature of multimedia products allows you to add supplementary content to your videos in a mobile-responsive wrapper, including interactive transcripts, polls, downloadable resources, comments/discussions, and custom HTML/text. Multimedia products can track completion.
* **SCORM** - SCORM courses are used to present interactive multimedia content to your learners, tracking completion, scores, and time spent.
* **Survey** - Survey products require users to fill out custom surveys created in the admin interface. Detailed results of users responses and survey question aggregates are stored and can be reported on.
* **Test** - Test products are tests created within the LMS by admins. Admins can define requirements for passing/completion of tests within the Himalaya Test Engine
* **Welcome Page** - Displays a custom HTML/WYSIWYG text page created by Admins in Product > Create. Welcome Pages can include template variables that fill with course-specific information and links.
* **Package Products -** Use packages to bundle content (other products) together for learners, set up logic to determine what learners will need to do to complete the content, and configure the content display.

# Catalog

A catalog provides a search list of learning products in which a user can enroll. Separate catalogs may be created for various groups of users, such as members and nonmembers. The offerings may be the same, with only a price differential displayed, or certain offerings may be restricted to one group or another.

A user can purchase or enroll in a learning object from the catalog. They may be either standalone learning objects or packages of learning objects.

# Catalog Entry Variant

An Entry Variant is required for a catalog item. If the entry variant is missing, the item cannot be purchased or launched from the catalog. Entry variants can be subscription or date based.

# Agreement

Text that learners will have to agree to before entering a self assessment product

# Tag Set

A hierarchical structure that can have multiple levels. For example, a tag set called Topics could include tags such as Finance, Organizational Structure, International Relations. A tag set such as Position might include tags such as Executive, Manager, and Staff.

They can be applied to various learning items, such as products and knowledge base articles, but they can also be applied to users to provide a means of identifying peers.

# Tag

A designation within a tag set. It is applied to specific items and is the basic method for organizing and searching for items on Crowd Wisdom.

Individual tags within a tag set can be added and these tags apply to new and existing learning objects.

# Himalaya

The Himalaya™ Test engine provides you with the means to author Assessments, Exams, Tests, and Quizzes. With three (3) test types, and ten (10) question types you have the flexibility to deliver the type of knowledge check that best meets your needs.

# Question Pool

Pools allow tests to randomly pull questions from different pools to create a unique test

# Program

# Survey

The Survey feature has several uses:

* **Surveys** consisting of multiple questions that can be emailed to users at the completion of a course for course feedback. The delivery of this type of survey can be done by navigating to **Catalog > Create** or **Catalog > List > Edit** function and assigning a survey in the survey box.
* Surveys that can be offered as a product in the catalog by creating the survey as a product, and adding it to the course package.
* Single-question polls can be displayed on the dashboard. This can be done by selecting the widget on the landing page, clicking the gear icon, and populating the survey field from a pool of published surveys.
* Site surveys that deliver one or more questions to users of the LMS. These may be enabled through the **Forum > Settings** option and configured to be displayed at varying frequencies.

# Grade Scale

Grade Scale refers to threshold values on single or multiple levels which can be applied to products. For instance, one can set a threshold of 95% to follow a Grade Label of A, a threshold of 90 to follow a Grade Label of B. Grade Scale categories may consist of Attendance, Classroom grades, or Exams.

# Certificates

Certificates provide users with proof of their meeting the standards of a particular program. A certificate may be triggered by achieving a passing score on a test or by completing SCORM courses.

# Email Manager

The Email Manager function provides basic templates for automatically issued emails. Once enabled, the email is sent to any user meeting the conditions, such as confirming a purchase. Each email incorporates appropriate variables, such as course name, but the message text for the email is standard across the site.

# Credits

Admin has the ability to set a number of credits awarded to a learner for completion of course, event, etc.

# Credit Types

These are implemented in your system when it is established. Common credit types are CE, CME.

# Renewing Your SSL Certificate Review or Grant Credits

This function enables the Admin to review and grant continuing education credits for learning that takes place outside the LMS, such as attendance at a seminar. The system allows searching by year for credits granted or not granted, and searching for credits for an individual. [Link](https://digitalignite.zendesk.com/hc/en-us/articles/114094043834-Renewing-Your-SSL-Certificate)

# Knowledge Base

The Knowledge Base function is used to add resources that are displayed on the Knowledge Base page, if this page has been implemented in the organization’s Crowd Wisdom LMS. The Knowledge Base allows users to search for items by category and enables the Admin to highlight certain resources.

# Access Codes

Access codes are the easiest way to provide free access to courses in your system. They must be distributed manually to learners by admins. Once a learner receives an access code they will be able to click “buy” on a catalog item and apply the access code in the access code/coupon code box.

# Coupons

Coupon codes serve as a means to provide discounts to users in systems using our ecommerce system. If your organization is using a separate ecommerce system, these coupon codes will not function.

# Event Products

Use Event products to manage sessions, provide event materials, track attendance, and survey learners. Note: this is an add-on feature for the LMS. To enable it, please talk to your project manager.

# Enrollments

The Enroll New Learner function can be used to enroll reviewers in a test course, or to extend and individual user’s subscriptions.

# Cyberduck and Amazon S3 Server

Use Cyberduck to easily load and organize your content on YM Learning’s Amazon Content Server. While we do not officially endorse or support any particular FTP client and cannot guarantee performance, Cyberduck is one that we make frequent use of and have had success with.

# Warm Seat

Warm Seat is an add on module for live event capture capability. With this module, we can support evaluations per session to facilitate the attendee completion of required session and event surveys.

# Institutions

The ability to break your LMS into subsections, individual groups, companies where people can go in and administrate learners and content where it feels like a personal LMS but it is just a supervisory capacity.

# JIT (Just in Time) Catalog