SCORM Wrapper Administrator Training Guide

Name: ________________________________
Customer ID: _________________________
URL: http:// _________________________ .claritynet.com
Your Login: __________________________/
Technical Support: 800-946-8584
Table of Contents

Initial Set Up of the Learning Management System ........................................ 1
The End-User Experience – Interactive Courseware ........................................ 3
Users .................................................................................................................. 4
  Adding/Editing Users ..................................................................................... 5
  User Permissions ............................................................................................ 6
Global Options .................................................................................................. 7
  Display Settings ............................................................................................... 8
LMS Text Editor ................................................................................................. 9
Curriculums ........................................................................................................ 10
  Adding/Creating Curriculums .......................................................................... 10
  Adding Courses to a Curriculum ..................................................................... 11
  Course Options Template ................................................................................ 11
  Modules ............................................................................................................ 12
  Assignments ..................................................................................................... 12
Courses ............................................................................................................... 13
  Edit Courses .................................................................................................... 14
  Assign Course ................................................................................................. 14
Course Options Template .................................................................................... 15
  Course Options ............................................................................................... 16
Feedback ............................................................................................................ 22
Certificates ......................................................................................................... 23
  Adding and Editing Certificates ..................................................................... 23
  Adding Content to a Certificate Template ...................................................... 24
  Assigning Certificate Templates ..................................................................... 24
Reset Training Data ............................................................................................ 25
Reports ................................................................................................................. 26
  Filter Report Criteria ....................................................................................... 26
  Using the Report Filters .................................................................................. 27
  Processing a Report ......................................................................................... 28
  Exporting/Printing a Report ............................................................................ 28
  Scheduling a Report ......................................................................................... 28
  List of Available LMS Reports ........................................................................ 29
Scheduled Reports .............................................................................................. 30
  Creating a Scheduled Report Template ........................................................ 30
Course Authoring Permission .............................................................................. 33
<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>CustomEase Courses</td>
<td>34</td>
</tr>
<tr>
<td>FLASH Course Customization</td>
<td>36</td>
</tr>
<tr>
<td>Asset Formats - Summary</td>
<td>36</td>
</tr>
<tr>
<td>Asset Formats - Details</td>
<td>37</td>
</tr>
<tr>
<td>Using CustomEase - Storyboard Editor</td>
<td>38</td>
</tr>
<tr>
<td>Navigating CustomEase - Options</td>
<td>39</td>
</tr>
<tr>
<td>Preparing to Customize Your Interactive Course</td>
<td>39</td>
</tr>
<tr>
<td>Adding Storyboards</td>
<td>40</td>
</tr>
<tr>
<td>Storyboard Types</td>
<td>41</td>
</tr>
<tr>
<td>Storyboard Templates</td>
<td>42</td>
</tr>
<tr>
<td>Creating Storyboards</td>
<td>46</td>
</tr>
<tr>
<td>Uploading Assets</td>
<td>46</td>
</tr>
<tr>
<td>Formatting Storyboards</td>
<td>47</td>
</tr>
<tr>
<td>Previewing Storyboards</td>
<td>47</td>
</tr>
<tr>
<td>Questions with Remediation</td>
<td>48</td>
</tr>
<tr>
<td>Test Questions &amp; Question Banks</td>
<td>49</td>
</tr>
<tr>
<td>HTML5 Course Customization</td>
<td>50</td>
</tr>
<tr>
<td>HTML5 Asset Formats</td>
<td>50</td>
</tr>
<tr>
<td>Using CustomEase – Storyboard Editor</td>
<td>51</td>
</tr>
<tr>
<td>Navigating HTML5 CustomEase</td>
<td>52</td>
</tr>
<tr>
<td>Preparing to Customize Your Interactive Course</td>
<td>53</td>
</tr>
<tr>
<td>Adding Storyboards</td>
<td>54</td>
</tr>
<tr>
<td>Storyboard Types</td>
<td>55</td>
</tr>
<tr>
<td>Storyboard Templates</td>
<td>56</td>
</tr>
<tr>
<td>Uploading Assets – Streaming Editor Property</td>
<td>57</td>
</tr>
<tr>
<td>Uploading Assets – Still Editor Property</td>
<td>58</td>
</tr>
<tr>
<td>Uploading Assets – URL Editor Property</td>
<td>59</td>
</tr>
<tr>
<td>Uploading Assets – Recall Editor Property</td>
<td>59</td>
</tr>
<tr>
<td>Test Question &amp; Question Banks</td>
<td>62</td>
</tr>
<tr>
<td>Formatting Text</td>
<td>63</td>
</tr>
<tr>
<td>Previewing and Saving Storyboards</td>
<td>64</td>
</tr>
<tr>
<td>Deleting Storyboards</td>
<td>65</td>
</tr>
</tbody>
</table>
Initial Set Up of the Learning Management System

In order for End-Users of the Learning Management System to have the best experience, it is important that the following System Requirements are met:

<table>
<thead>
<tr>
<th>Compatibility Topic</th>
<th>General Site Functionality (Administrative User Roles, Employee User Role)</th>
<th>HTML5 Course Delivery (Employee User Role)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Device(s)</strong></td>
<td>Desktop, Laptop, Smartphone, Tablet</td>
<td>Desktop, Laptop, Smartphone, Tablet</td>
</tr>
<tr>
<td><strong>Platform(s)</strong></td>
<td>Desktop/Laptop(s): PC, Smartphone(s): Apple/Android/Windows, Tablet(s): Apple/Android/Windows</td>
<td>Desktop/Laptop(s): PC, Smartphone(s): Apple/Android/Windows, Tablet(s): Apple/Android/Windows</td>
</tr>
<tr>
<td><strong>Operating System(s)</strong></td>
<td>Windows: 7 and later; Mac OS X: 10.8 and later, Smartphones and Tablets: Latest Android/iOS/Windows versions</td>
<td>Windows: 7 and later; Mac OS X: 10.8 and later, Smartphones and Tablets: Latest Android/iOS/Windows versions</td>
</tr>
<tr>
<td><strong>Browser(s)</strong></td>
<td>Windows: Microsoft Internet Explorer, Microsoft Edge, Google Chrome, and Mozilla Firefox</td>
<td>Windows: Microsoft Internet Explorer 11+, Google Chrome 44+, and Mozilla Firefox 42+</td>
</tr>
<tr>
<td></td>
<td>Mac OS X: Safari, Google Chrome, and Mozilla Firefox</td>
<td>Mac OS X: Google Chrome 44+, Mozilla Firefox 42+, and Safari 11+</td>
</tr>
<tr>
<td></td>
<td>Smartphones and Tablets: Android/iOS/Windows versions</td>
<td>Smartphones and Tablets: Google Chrome 44+, Mozilla Firefox 42+, and Safari 11+</td>
</tr>
<tr>
<td><strong>Internet Connection</strong></td>
<td>• LAN-based broadband preferred</td>
<td>• LAN-based broadband preferred</td>
</tr>
<tr>
<td></td>
<td>• High-speed wireless for mobile devices (performance may vary.)</td>
<td>• High-speed wireless for mobile devices (performance may vary.)</td>
</tr>
<tr>
<td><strong>Network/Firewall (Described Below)</strong></td>
<td>Refer to Network/Firewall Accommodations: Cosmetic/DuPont Content URLs, See Third-Party Application Update URLs</td>
<td>Refer to Network/Firewall Accommodations: Cosmetic/DuPont Content URLs, Kaltura Streaming Video URLs</td>
</tr>
<tr>
<td><strong>Screen Resolution(s)/Color</strong></td>
<td>Desktop/Laptop: 1024x768 px, 32-bit color Smartphone: 320x460 px (@100 ppi)</td>
<td>Desktop/Laptop: 1024x768 px, 32-bit color Smartphone: 320x460 px (@100 ppi)</td>
</tr>
<tr>
<td></td>
<td>Tablet: 1024x768 px (@100 ppi)</td>
<td>Tablet: 1024x768 px (@100 ppi)</td>
</tr>
<tr>
<td><strong>Third-Party Application Dependencies</strong></td>
<td>Latest versions of Adobe Flash, Java, and Active X</td>
<td>Latest versions of Adobe Flash, Java, and Active X</td>
</tr>
</tbody>
</table>
SYSTEM AND NETWORK SPECIFICATIONS

- Pop-up blocker must be disabled in web browsers.
- Operating under a thin client environment, Citrix, VPN, or other terminal services, is not supported.

<table>
<thead>
<tr>
<th>Network/Firewall Accommodations</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>DuPont™ eLearning Suite File Types (for Courses)</strong></td>
</tr>
<tr>
<td><strong>Coastal/DuPont Content URLs</strong></td>
</tr>
<tr>
<td>Applies to:</td>
</tr>
<tr>
<td>• DuPont™ eLearning Suite Learning Management System</td>
</tr>
<tr>
<td>• Any Coastal/DuPont SCORM Wrapper Courses</td>
</tr>
<tr>
<td><strong>Kaltura Streaming Video URLs</strong></td>
</tr>
<tr>
<td>Applies to:</td>
</tr>
<tr>
<td>• DuPont™ eLearning Suite with HTML5 Courses</td>
</tr>
<tr>
<td>• All CoastalFlix™ Offerings</td>
</tr>
<tr>
<td><strong>Third-Party Update URLs If/As Needed for DuPont™ eLearning Suite</strong></td>
</tr>
<tr>
<td>If applicable, ensure network(s) and workstations at each distinct, targeted training location allows for continual update of third-party application dependencies.</td>
</tr>
<tr>
<td>Refer to the “<strong>System Specifications</strong>” section of the Third-Party Application Dependencies.</td>
</tr>
</tbody>
</table>
The End-User Experience

**INTERACTIVE COURSEWARE**

Do NOT exit the course here.

For training data to be communicated back to the client’s LMS, the user MUST exit the course via the Course Exit button, not the browser button.

**APPLIES TO FLASH COURSES ONLY** –

**SEVEN SKIN OPTIONS TO CHOOSE FROM:**
Users

- Users

All Administrative Users should be manually added to the database. All Employee Users logging in your company’s source LMS will be automatically added to the database and assigned the Employee User Role. No editing is required, except to also assign an Administrative Role to a user.

The Add, Edit and Delete buttons are located at the bottom of the User List dialog box and appear with a red border when they are available.
The basic elements that are required to successfully access the LMS are **User ID**, **Password**, and **Role**. **User ID** and **Password** are required to log into the LMS. **Role** is required for users to access the navigation structure (LMS functionality) and complete the tasks that are assigned to them.

**Expanded View shown below:**

Only Administrative Users need to be **manually** added. Employees users will be automatically added to the database when launching a course from the source LMS.

**Required fields:**
- User ID
- Last Name
- First Name
- Password
- Role
- email address if using scheduled reports
**USER PERMISSIONS**

**User – Permissions** gives the system administrator the ability to edit/modify the Permissions of any generic Role an Administrator has been assigned to. Any settings altered here apply only to this user and do not affect the Permissions of other users in the LMS assigned to the same Role.

The **User – Permissions** tab can be accessed by either adding or editing a user, then selecting the Role to be edited from the **Roles** dropdown list.

![User - Permissions](image)

- **Allow:** Enables the user the ability to perform each of the functions with the allow checkmark, i.e. Change Language, Skins (Themes), Profile and Inbox.

- **Deny:** Disables/turns off the ability for the user to perform the function with a **Deny** checkmark.

- **Full:** When the **Full** checkbox is selected the user will have full access to the functionality enabled by the checkmark; usually allowing the user to Add, Edit or Delete information.

- **Read:** When the **Read** checkbox is selected the user will only be able to view the information. Add, Edit and Delete buttons will be replaced by the **Select** button.

When no checkbox is selected – **Full** or **Read** – users cannot view, add, edit, or delete information. The functionality will not be accessible to the user and will not appear on their Dashboard screen when logged into that Role. (Permission will be denied entirely).
Global Options

Global Options Tabs include General, Display Setting and Login Template.

Options and functions can be set for Global Options and Login Settings.

**NOTE:** Course and Catalog List Pages, Email Notification, Groups and Additional Information functionality does not apply to SCORM Wrapper clients.

The Language option pertains only to the LMS user interface, not to the language of the Interactive Courses.
Company Graphics: Logo or other images can be uploaded by clicking the Edit... link (file types: jpg or png).

The site can be branded with organizational colors.

Course Skins can be set for Flash version courses.

NOTE: Only Administrators will see these updates: Employee Users do NOT see the DuPont eLearning Suite Login Page so they do not see Global Settings except for the Logo.
The **LMS Text Editor** allows system administrators to edit **Labels**, and **Additional Information** used throughout the LMS Application. User roles with full access permission can edit within the LMS Text Editor.

To edit an item, select it, and then select the Edit button to open the **Edit Label** box.

**Character Limits:**
- Labels = 256 characters
- Alert Message = 512 characters
- Welcome Messages = 256 characters
- Help Text = 256 characters

Type your required text in the **Custom** box area and click the **Done** button.

**NOTE:**
You **must** click the **Save** button to save your changes. Clicking **Done** alone will **not** save the change.

Remember to Click the **Save** button on the bottom of the LMS Text Editor screen to save your changes.
Curriculums

For SCORM Wrapper clients, Curriculums are the primarily used for customizing courses. If multiple customized versions of a course are required, each course should be placed into its own Curriculum and accessed by its Curriculum in CustomEase.

ADDING/CREATING CURRICULUMS

Users that have been assigned roles with full access permission to Curriculums are able to Add, Edit and Delete Curriculums. Under Training Management, select Curriculums and the Add button to create a new curriculum.

Curriculum ID: Up to 64 characters that must be unique and cannot be duplicated.

Curriculum Name: Up to 100 characters.

Curriculum Description: Up to 512 characters.
**ADDITION COURSES TO A CURRICULUM**

This tab allows system administrators to change the Course Options Template assigned to the courses in the curriculum. To change a course options template for a course:

1. Select the checkbox beside the course.

2. Select a template from the Course Options Template dropdown menu.

3. Click Save.

Note: Only one Template can be updated at a time.

4. Confirm changes to the Course Options will be applied to All Users or Future Users Only.
MODULES

Modules – Modifying the Menu Structure of Courses
System administrators can de-select modules (training chapters) within the course to hide material that may not be pertinent to the needs of the user(s) assigned to the course by simply removing the checkmark in the box corresponding to the course module.

Unchecked Modules will not be visible to the User.

When training topics are de-selected, the questions in the Self-Check and Post-Test pertaining to the material will also be removed.

ASSIGNMENTS

For SCORM Wrapper clients, it is recommended that Administrators be the ONLY users assigned to the Curriculum for the purpose of reviewing courses. Regular employee users will be assigned to their courses through the client’s LMS, not here.

The user list can be filtered by Roles so that only SCORM Administrators names appear on the list of Users. Select the Users you wish to assign to this curriculum.
User roles assigned full access permission can Add, Edit or Delete Courses.

If the course has already been added to a Curriculum, be sure to Filter by Curriculum to ensure the correct version of the course is edited.

Inactive courses will appear in a different color.
EDIT COURSES

To edit a course, select the course name’s radio button and selected the Edit button.

ASSIGN COURSES

Select the Checkbox in front of the Names you want to assign then click Save to Assign courses.

NOTE: Only system administrators should be assigned to courses for course preview purposes.
Course Options Template

System administrators use the Course Options Template to determine various course options and settings that will apply to the Employee User experience and mastery requirements. All courses are assigned a Course Options Template.

In the Course Options Template List, the default template displays in red font and is automatically assigned to all courses. The Set as Default option indicates which of the available templates will be the default template.

Course Options Tips link opens a new window with a printable document explaining each option.

Default Template is set to expire at 11 months.
Templates may be copied by selecting a template from the items listed in the Course Options Template List. Once selected, the settings for the new course options template will be generated from the existing template that was chosen from the dropdown listing.
Course Options will be updated only for values which have the checkbox selected.
Listed below are screen shots and definitions of each option/setting, by section:

**Course Options**

- **Course Active**: Default is Yes, the course will be displayed in the user’s learning tab. If No, the course will not be displayed for end users. The course will be listed for administrators and can still be customized, if inactive.

**Course Completion Options**

- **Certification Period**: Default is 12 months. Can be changed to any monthly period. Enter the numeric value of zero (0) if the course only has to be passed one time.

- **Certification Grace Period**: To extend the certification period for a course (if user fails to recertify in time); to extend “Mastered” status for a specified period of time before the course changes to “Expired” status.

- **Move From Completed to Due**: Date at which a course that is up for renewal will be transferred from the “Completed” tab (Mastered Status) and placed on the User’s “Due” Learning tab with a “Certification Due” status. Default is 1 month in advance and can be edited.
### E-Mail Notification Trigger Options - Continued

<table>
<thead>
<tr>
<th></th>
<th>After</th>
<th>By</th>
<th>By</th>
<th>By</th>
<th>By</th>
<th>Hide Course from User until Availability Date</th>
<th>Deactivate Course Link after End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Course Available Date</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>User Should Start Course</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>User Should End Course</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Course Available Date**: Requires a specific number of days or actual date that a user must wait to access a course after it has been assigned. The course link will appear on User’s Learning Tab in red and will be inactive until specified start date or hidden if Hide Course from User until Availability Date box is checked.

**User Should Start Course**: Specifies the period of time that a user have to start the course.

**User Should End Course**: Defines the period of time, or specific date user has to complete the course. Course can also be deactivated if Deactivate Course Link after End Date box is checked.
Testing Options

Check box to activate & select and radio button to edit options

Note: These 3 options only display when 'Yes' is selected for 'Pre-Test Enabled.’ Otherwise, they remain hidden.

Pre-Test Enabled: Default is No. If Yes, the Pre-Test runs first and user must complete the Pre-Test before being allowed to enter a course.

Pre-Test Passing Score: Default is 80% and can be edited.

Pre-Test Credit Enabled: Default is No. If Yes, a user (with passing score) gets credit for the Pre-Test and tests-out of the course (does not have to take the training).

Disable Pre-Test After "N" Consecutive Failed Attempts: Specify the number of times (“N”) an employee user may fail a pre-test before pre-test is disabled.

Post-Test Enabled: Default is Yes. Used to track course mastery with a score when a user passes a course. If disabled, the Post-Test won’t appear in a course and a user won’t get credit for having taken a course. (Can’t track user completions).

Disable Post-Test After “N” Consecutive Failed Attempts: Specify the number of times (“N”) an employee user may fail a post-test before post-test is disabled.

Post-Test Passing Score: Default is 80% and can be edited.

Retake Missed Questions in Post-Test: Default is No. If Yes, the user can retake wrongly-answered questions in the Post-Test. (Exact questions, not question-bank randomized.) (100% Mastery.)

Self-Check Passing Score: Default is 80% and can be edited.

Disable Post-Test After “N” Consecutive Failed Attempts: Specify the number of times (“N”) an employee user may fail a post-test before course is disabled by the LMS.

Interval Between Failed Post-Test Attempts: Specify user wait time after user has failed the Post-Test.

Proctor Post-Test: Default is No. If Yes, a user cannot take a Post-Test until an authorized* administrator enters their User ID and Password. (*Proctor Post Test checkbox on User List User’s General tab).

E-Signature required at the end of Post-Test: Default is No. If Yes, user is required to re-enter credentials after they complete the Post-Test in order to view score screen.
Mastery Options

**Grant Mastery When User Passes All Self-Checks:** Default is No. If Yes, user can pass a course by successfully mastering all Self-checks and not have to take the Post-Test.

**Grant Mastery When User Completes All Modules (No Test):** Default is No. If Yes, user can pass a course by successfully completing all modules without having to take the Post-Test.

**Additional Hands-On Requirement:** Default is No. If Yes, user can only master a course if both the mastery level is achieved and after an administrator gives credit for “Hands-On Complete” in the Classroom & Hands-On Scores: Also, the course will have a “Hands-On Required” icon beside it in the “Course listing” screen to indicate that the course requires hands-on completion.
User Functionality Options

**Show Default Skin:** Select skin for each course. Will override Global Options setting.

**Show Bit Rate:** Default is Yes. No, will hide the bit rate selection from user.

**Bit Rate Default:** Default set to 100Kbps (minimal bandwidth).

**Complete All Modules Sequentially:** Default is No. If Yes, user will be forced to go through all the training modules in the course menu in sequential order. Topics remain grayed out until previous topics are completed.

**Must Pass All Self-Checks to Unlock Post-Test:** Default is No. If Yes, user cannot take Post-Test unless all Self-Check modules are mastered. *Note: this option will not be displayed if ‘Complete All Modules Sequentially’ is set to Yes.*

**Click “Finish” After Each Question:** Default is No. If Yes, user will need to click a ‘Finish’ button before proceeding to the next question.

**Review Test Enabled:** Default is No. If Yes, upon finishing test and before submitting for score, user can choose to go back and change answers. Once submitted for score, user can still choose to review test and will see the correct answers displayed for those questions missed.

**Show Comments:** Default is No. If Yes, enables user to write comments. These comments can also be reported on and are available for others to see, publicly.

**Show Notes:** Default is No. If Yes, user can take notes on each storyboard in the course. Notes are only available to that user (private); others will not see their notes.

**Enable Auto Advance for Storyboards:** Default is No. If Yes, as soon as audio or video completes, the screen will automatically advance to the next screen.
User Functionality Options – Continued

- **Show Score Screen**: Default is Yes (will display score screen at completion of test). If No, the score screen will be hidden from employee user.
- **Print Certificate**: Default is No. If Yes, users can print their own completion certificates.
- **Force Course Feedback**: Default is No. If Yes, it will require user to complete the feedback survey, as part of the course, prior to receiving the results of the course.
- **Disable Post-Test After User Masters the Course**: Default is No. If Yes, the Post-Test link will be disabled once the user masters the course.
- **Allow Video Fast-Forwarding**: Default is Yes. If No, video progress bar is disabled to prevent user from fast-forwarding video clip.
- **Course Timer**: Default is No. If Yes, a small clock timer will appear on both the Course Menu and top of course storyboards to record active time user spends on course.

Redirection Options

- **Redirection URL – Mastered**: When a User masters a course, the user will automatically be redirected to the URL specified in this tab.
- **Redirection URL - Not Mastered**: When a User fails the Post-Test, the user will automatically be redirected to the URL specified in this tab.
- **Show Asset Selection**: The default is No. If Yes, it will provide users with an asset path to access assets while launching an Interactive Course.
Feedback

The Feedback feature is available for system administrators to collect user feedback and comments that the employee wants to submit about their training. Feedback surveys can be set up as Mandatory (via the ‘Force Course Feedback’ Course Options Template setting.)

Using features available in the Feedback tool, system administrators may add additional questions, modify existing questions, change the sequence of questions and delete any questions that are not needed. System administrators can run the Course Feedback report to view feedback submitted by users.

To add a question to the list of options in the Feedback List, select the Question tab. System administrators may use the Move buttons available to adjust the order of feedback questions.

Below is a sample of what the user will see:
Certificates

Administrative users have the ability to add **Certificates** and customize them according to their organizational needs. These certificates may be used to record the achievements of participants. As many **Certificates** can be created as needed; there is no limit.

Course completion certificates may be generated for users when they have successfully met the course requirements of a course or curriculum. Users may view and print certificates in two different sizes: **Normal** and **Wallet**. The default certificate templates provided are:

- **Default Course Certificate-Normal**: standard 8½ x 11 paper size
- **Default Course Certificate-Wallet**: approximately the size of a business card
- **Default Curriculum Certificate-Normal**: standard 8½ x 11 paper size
- **Default Curriculum Certificate-Wallet**: approximately the size of a business card

**ADDITION AND EDITING CERTIFICATES**

Administrators are able to add or edit **Certificate Templates** for courses and curriculums as well as having the option to change the size of the certificate templates. Certificate details may be added using the **General** tab, including **Certificate Name**, **Type** and **Size**. The Certificate can be made available for selection by other users by checking the **Active** checkbox.

A helpful tip: In the **Certificate** list page, the certificate templates that are highlighted in red are the default certificates; templates in black are the created certificates. The **Active**, **Certificate Type** and **Certificate Size** options will not be available for modification. Certificates cannot be deleted without unassigning them from the Course or Curriculum they are assigned to.
System administrators may customize the certificate template with their own content using *keywords* to edit the certificate content with information of their choice and to embed User’s Identity (who), Training Information (Course Name, Course ID, and Delivery ID), Mastered date (When) and Groups Information. Keywords pull the information from the LMS database and display for the users.

**Keywords** can be pulled from the LMS database fields to build your **Certificate Templates**.

**Instructor Name** field is only available on **Course & Assessment** Certificates, not Curriculum Certificates. Maximum of 3 names can be displayed.

**Certificate Images** can be uploaded such as a company logo or signature. Select image from dropdown list to be added to the body of the certificate.

**Assigning Certificate Templates**

To assign courses or curriculum to certificate templates, move them from the **Available** list box to the **To Assign** list box using the navigation buttons seen between the **Available** and **To Assign** list boxes.

You have the choice to assign **Certificates** by **Courses** or by **Curriculum**. If you choose to assign by **Curriculum**, the courses associated with the **Curriculum** will display below.
**Reset Training Data**

Roles that have full access permission to **Reset Training Data** are able to clear training records from the LMS that have been recorded for a course. Options are available to reset each of the individual records or all the records for a user.

**Select Course(s)**

If the course has been added to a Curriculum, be sure to **Filter by Curriculum** to ensure that training data is being reset for the correct version of the course. Filtering by Curriculum will refresh the course list to display only the courses assigned to the selected Curriculum. Then select the desired course(s).

**Select User(s)** – all users with training data for the selected course will appear in the list.

Select the user(s) from the **Available** list who need their training data reset.

**Reset All** or **Reset** select training data by selecting the box to the left of the item listed.

If ‘Disable Post-Test’ option(s) have been utilized in the **Course Options Template** to lock out the user, it can be reset here to unlock the user, re-enabling their access to the Post-Test.
Reports

Report Management enables users with full access permissions to Add, Edit, Delete, Design and Run Reports. Reports are delivered through HTML Reports and can be exported into .XLS, .PDF, and .CSV formats.

Click on the Reports link to get to the Report Listing.

FILTER REPORT CRITERIA

Select your desired Report from the Report Listing Page and use the Filter Report Criteria section to filter the report results. All the available filter links are displayed.

Select from any of the available filter links, one at a time, to set your filters.
Below is an example of Filter selection, using the Course Status field. What appears on the list is determined by the User Access Boundaries set by the system administrator. Select from any, or all, of the available options listed.

Multiple selections can be made. Click Done to save.

Below is an example showing the results of multiple filters that have been set for this report.

Report will return results based on the selected filter criteria.
PROCESSING A REPORT

Select **Process Report** to run the report. Select **Save Criteria** to save the filter criteria selected to run future reports. Select **Reset** to clear the filter choices.

Check the box for **Process this Report for Unformatted Data Only** if you want to export this report to Excel.

EXPORTING/PRINTING A REPORT

Your report results will display. Select from the **Export To:** dropdown window in the upper right corner to Export the report to desired format. Click the **Printer** icon to print the report.

Use the arrow keys here (or the same ones in the lower left corner) to page through the report.

Select the format to **Export** the report to (XLS, PDF, Unformatted XLS, CSV). Select **Unformatted XLS** or **Unformatted XLSX** for raw excel spreadsheet.

SCHEDULING A REPORT

If the capability has been enabled by your system administrator, you may be able to schedule designated reports to be e-mailed to select individuals at a scheduled time or scheduled intervals.

A helpful tip: Create your **Scheduled Reports** after running a report. Once you have run a report, a **Schedule this Report** button will be available. This will give you context to your scheduled report and who you are running it for. The **Scheduled Reports** link under **Report Management** will serve as a repository of all your scheduled reports, much like E-Mail Notification is a repository for all the e-mails created in the LMS.
**LIST OF AVAILABLE LMS REPORTS**

**Course Details:** Provides a list of all course descriptions.

**Course Feedback:** Shows results of Course Feedback submitted by users. Can filter by User Name, Course Name, Course Started Date, Curriculum Name. This report cannot be edited.

**Course License Status:** Lists the license status (Available, Used, Remaining) of all installed courses. Can filter by Course Type, Course Name.

**Course Options Template – Courses:** Lists Course Options Template details assigned to selected courses. Can filter by Curriculum Name, Template Name, Course Name, Course Type.

**Curriculum Course Assignments:** Lists courses assigned by Curriculum, date course was last updated and by whom. Can filter by Curriculum Name, Course Name, Course Assign Status.

**Storyboards Customize:** Lists the details of storyboards that have been customized, including the Storyboard Number, Date Last Customized, Name of user who made the customizations. Can filter by User Name, Curriculum Name, Course Name.

**Test Scores – Enhanced:** Displays the list of the Pre-Test, Self-Check and Post-Test scores.

**NOTE:** The LMS stores and maintains the scores secured by every single user registered in the LMS in the courses they are assigned to. Test scores may be drawn even for courses and users that are deleted from the LMS database. This report also displays the scores of the user even when the user is unassigned from the course/curriculum. The records of users who are not associated with the course any longer displays in red font.

**User Certified Certificates:** User Completion Certificates are stored electronically and can be printed (8.5x11 size). System administrators may filter by User Active, User Name, Course Name, Required Vs Optional, Last Test Taken Date, Course Type, Certificate Name, Curriculum Name, Role Name, or Group. This report cannot be edited.

**User Certified Historical Data:** Lists the users who have passed the course and are certified. Records may be drawn even for users and courses that are deleted from the LMS database. This report also displays the users even when they are unassigned from the course/curriculum. The records of users who are not associated with the course any longer displays in red font.

**User Course Comments:** Displays course Comments for all courses, including User Name and User ID. Can filter by User Active, User Name, Course Name, Course Started Date, Course Type, Role Name, Curriculum Name, any of the Groups.

**User Training Status - Enhanced:** This report displays the course status, event registration status and event attended status of the users. The tabulation displays the different status sets available under each category.

**User Training Status Enhanced Summary:** This is a summary report that displays the percentage of courses that the users have started, not started, failed to complete, mastered and the percentage of courses for which the certification has expired. This is an enhanced summary report and enables the administrator to group the data by Curriculum or Supervisor Name or by any activated Group Type.

**NOTE:** Reports appearing on the Report Listing in blue denote reports that are not editable.
Scheduled Reports

Although Scheduled Reports can be created here, it is recommended that they be created from the Schedule this Report link after running a report, as it will include the filters you have selected.

Creating a Scheduled Report Template

Click the Schedule this Report link to open the Scheduled Report E-Mail Notification Template.

To expand the view of this screen, click the Expand Tree icon.

After expanding the view of the screen, the notification details can be added under General, Settings, Report Details, Email Details, Schedule Details and Active.

Type your Schedule Name here.

Select File Type from the dropdown list for the format you want the report to be viewed in.

The template will display the Filter Settings used to process the report. (This section only appears if you click Schedule this Report link after running a report.)
Select the **Relative Date** filters to specify the date-based selection criterion for which the report is to be processed. *(This section only appears if you click Schedule this Report link after running a report.)*

Create the body and message of your email in the **Email Details** section.
Determine the **Scheduling** of the report.

After clicking the ‘Save’ button to save, the following pop-up message will display:

Note: Maximum time limit/scheduling period for a Scheduled Report is 3 years.

Specify the time and date on which the scheduled report e-mails should be sent to the users. Choose from the available options whether the e-mails will be sent on a **Daily**, **Weekly** or **Monthly** basis.

Check the **Active** box to activate the template. Then click **Save** to save the template. To de-activate and stop emails from firing, uncheck the **Active** box.

The body of the email will automatically include the link and message to notify the recipient:

**Click here to download report**

This link will expire in 14 days from the time this email was generated.
Course Authoring Permission

Users with assigned permissions can access CustomEase. Initial permissions are established through Roles under User Management via the Permissions tab. Additionally, under Course Authoring Permission select users can be assigned to specific Interactive Courses. The purpose of assigning permission to a Course is to limit who can access and make edits to the Course via CustomEase. This is important for version control and locking down any potential of CustomEase editors overwriting each other’s work.

Administrator assignments can be made by applying filters by Groups or Roles to narrow down the list of users. After applying the filter, click the Click to Show Records button.
CustomEase Courses

The course listing page contains both Flash & HTML5 courses for CustomEase. Flash courses and HTML5 courses are customized in different applications. Please refer to the appropriate section of the training manual for the type of course you are customizing.

Flash courses will automatically open into the Flash CustomEase editing application and HTML5 courses will automatically open in the HTML5 CustomEase editing application.

NOTE: The course list that will be displayed is dependent upon the initial permissions established through Roles & Permissions of the Learning Management System and what specific courses this user has been assigned to under the Course Authoring Permissions.
Managing Course Editing

A dialog window will display when another person is currently editing a course with a message “This action cannot be completed as the course is being edited by another user; All other users will be 'locked' from opening the course to prevent multiple users from editing the same course at the same time.

Modified Courses

Courses that have been modified in CustomEase will display the icon under Modified.
Flash courses will automatically open into the Flash CustomEase editing application.

With CustomEase you can customize and make modifications to existing Interactive Courses.

You can Add, Edit or Delete Course Storyboards.

**Asset Formats – Summary**

For best results, the following file formats are recommended:

<table>
<thead>
<tr>
<th>Audio</th>
<th>mp3, wma</th>
<th>32 Kbps, 44.1 KHz, 16 bit, mono, CBR</th>
</tr>
</thead>
</table>
| Video   | flv, wmv | High Bit Rate: 400x300dpi, 320 Kbps, 15fps  
Low Bit Rate: 320x240dpi, 100Kbps, 15fps |
| Graphics| jpg, swf, png | Standard size: 400x300x72dpi |

**Helpful tips:**
- **Documents:** PDF preferred
- **Hyperlinks:** Allowed
- **Text:** All copied text will be stripped of formatting.
- **File size limit:** 10MB
Asset Formats – Detail

Graphics – jpg, and png format images can be used. Images created at 400 x 300 x 72 dpi will fit most image windows. Other sizes used are 240 x 180, 320 x 240, 960 x 720, 640 x 385 and 1024 x 768. Images will be stretched or shrunk to fit most windows. PowerPoint (ppt) slides can be converted from within the ppt to jpeg format with a set resolution of 960 x 720 x 96 dpi and can be directly used in the FS Graphic image template. Images are not stretched or shrunk in the FS Graphic template; the bottom 80 pixels of ppt slides that have been converted to images will be hidden by the navigation bar in FS Graphic template; you may have to make allowances for this and adjust information at the bottom of your ppt slides.

NOTE:
Raw file formats such as: tif or bmp are not accepted; you will need to convert into final edited format: jpg, or png.

Flash – swf format is an Adobe animation format. A resolution of 640 x 385 will fill the window in the Flash template. Smaller resolution sizes will work also but will be centered in the template window. Flash files can be created with or without embedded audio. Use of supplementary audio is also allowed.

Audio – mp3, wma, mpa and asf format can be used. Good quality audio can be created at 32 Kbps, 44.1 KHz, 16 bit, mono, and CBR.

NOTE:
Raw file formats such as: wav, cda and aif are not accepted; you will need to convert into final edited format: mp3, wma, asf, or mpa (mp3 is preferred.)

Video – flv, wmv format can be used. High bit rate video can be created at 400 x 300 dpi, 300/320 Kbps and low bit rate video can be created at 320 x 240 dpi, 100 Kbps. The overall bit rate is a combination of the video and audio bit rates and it is also suggested to use a frame rate of 15fps for both bit rates.

NOTE:
Raw file format such as avi, mpg and mov are not accepted; you will need to convert into final edited format: flv or wmv. (flv is preferred.)
Using CustomEase – Storyboard Editor

Enter the course. To access CustomEase, select a Training Module from the Course Menu:

![CustomEase Storyboard Editor](image)

Select **CustomEase** to open to the CustomEase Storyboard Editor.

An **Alert** message will prompt you to **Accept** responsibility for course modifications.

**NOTE:** Even though the look and feel of CustomEase is very similar to the Authoring Tool, CustomEase has limited functionality compared to the Authoring Tool. In CustomEase the Course Menu cannot be modified, Storyboards cannot be moved, and new Glossary terms cannot be created. The **Author** icon will display the user who modified the storyboard, along with the date and time the information was modified.
Navigating CustomEase – Options

The menu/navigation options for Custom Ease are located at the bottom of the screen:

Preparation to Customize Your Interactive Course

1. **Review Course & Determine Changes.** A thorough review of the existing course is recommended to determine what changes will need to be made to ‘customize’ the course.

2. **Document Changes.** Document the storyboard number (or exact location) of the storyboard that will need to be changed or deleted. Document the exact location you want to add a new storyboard to the course. Storyboards will be added immediately following the selected storyboard. **Note:** *Within CustomEase, the Course Menu cannot be modified; nor can storyboards be moved around within the course.*

3. **Develop and Organize Course Assets.** Assets are digital files that contain essential course content. They include audio, video, graphics, and text files. Before customizing a course, make sure your assets meet the following criteria: (a) You must have legal right to use the assets; (b) The assets are in a final edited form and format. The CustomEase Tool does not provide the capability convert assets. Audio files can be created and edited within the Audio Editor. Images can be edited within the Image Editor.

4. **Asset Housekeeping**
   a. Store assets in a convenient directory structure; using common naming convention for all assets
   b. Create a folder for the course, named after the course to hold all assets
   c. Create sub-folders for Graphics, Audio, Video and Text
Adding Storyboards

Click the **Add Storyboard** button in the lower left-hand corner and the **Storyboard Type** page will open, as depicted below:

Select a Storyboard by clicking on its icon. Each Storyboard icon is described in more detail in the upcoming pages.
Six Types of Storyboards:
VIDEO
STILL
FLASH
INTERACTIVE EXERCISE
LINK_URL
QUESTION

Storyboard Types

There are 6 Types of Storyboards: Video, Still, Flash, Interactive Exercise, Link_URL, Question.

- There are 24 different storyboard Templates available.
- Each Storyboard is designed for a specific purpose or function.
- The VIDEO storyboard is the only one that can contain video clips. FLV and WMV are the only file format types it is designed to accept. It cannot accept JPG, MP3 or any other type of file format. Audio should be embedded within the FLV file; there is no ability to upload a separate audio file (MP3) on the Video storyboard – only on the AV storyboard.
- STILL storyboards are designed to accommodate JPG, PNG, SWF files for the Graphic upload and MP3, WMA files for the Audio upload. They are not designed to accept Video (FLV, WMV) files. Storyboard variations include: Still, FS Graphic, Still-F, Still-3, Still-5
- The FLASH storyboard is designed to run SWF files – with or without embedded audio.
- INTERACTIVE EXERCISE storyboards include: Buttons, ClickDrag, ClickDragImage, Matching, MultiQ, SelfEval, SeSummary, Toggle. These storyboards can only be used in a Training Module (as part of a lesson). They are not available as ‘test’ questions (in the Self-Check Module).
- The LINK_URL storyboard is designed to accept a web address (include the full http:// part of the URL). This storyboard can be used to direct the user to a website or to attach a document within the course.
- QUESTION. There are two types of questioning techniques utilized within the Authoring Tool:
  1. Embedded (Content) Questions – part of a lesson module, to provide remediation. Created in ‘Training Module.’ Not for test score.
  2. Test Questions (Self-check, Post-test) for a SCORE. Created in the Self-Check Module. Post-Test questions pull from Self-Check question banks. All questions pulled randomly from question banks.
Storyboard Templates

**STILL**: Graphic Image can be Left, Right or Centered at 400x300x72dpi. JPG, or PNG. Support 9 Elements (except centered) and can be expanded. Narration Box, Audio file. Element image: 240x180

**VIDEO**: Video display can be Left, Right or Centered at 400x300x72dpi. FLV, WMV. Supports 9 Elements (except centered) and can be expanded. Narration Box. Element image: 240x180. Audio must be embedded in FLV file.

**VIDEO-W**: same as Video (above), except video display can be Left, Right or Centered at 448x252x72dpi.

**AV**: same as Video (above); except that Video and Audio files can be uploaded separately, to playback simultaneously.

**VIDEO-FS**: Video display can be Left, Right or Centered at 400x300x72dpi. FLV, WMV. Supports 9 Elements (except centered) and can be expanded. Narration Box. Element image: 240x180. User can select full screen mode, 903x678.

**VIDEO-WFS**: same as Video-FS (above), except video display can be Left, Right or Centered at 448x252x72dpi.

**STILL FADE**: Graphic Images can be Left, Right or Centered at 400x300x72dpi. JPG, PNG. Support 9 Elements (except centered) and can be expanded. Narration Box, Audio file. Images (2-9) fade in/out at 3-60 second intervals (set by Author) at same location. (Single image will remain still, not flash.) Element image: 240x180

**STILL-5**: Left or Centered. 9 Elements (and can be expanded), Narration Box, Audio File. Image files (part of Element Text only) can be maximum of 640 wide and unlimited heights. Scroll bar created if screen is overly long.
Storyboard Templates – Continued

**STILL-3:** Graphic Image in 2 Columns at 400x300x72dpi. JPG or PNG. 9 Scrollable images (with scroll bar). Narration Box. Audio file. (No place for text elements/ bullet points)

**QUESTION:** Question with 2-9 text answers. 1 correct answer. Graphic image 400x300x72dpi. Audio File. Self-Check & Training Module. Remediation in Training Module only.

**QUESTION BANKS:** Contain multiple variations (i.e. 4) of a question. One variation from each bank will appear in Tests.

**TOGGLE:** Left, Right or Centered. 8 Elements Statements. Correct and Incorrect Choices. Question, Incomplete, and Answer Audio Files. 8 Feedback Audio Files.

**MULTI Q:** Left or Right. 8 text statements. User compares his/her answers to correct answers. 8 Feedback Audio files consisting of Question, Incomplete, Answer, Partially Correct, Incorrect.

**CLICKDRAG:** Left or Right Graphic Image 400x300x72dpi. 8 text statements that can be dragged onto image. Audio files consisting of Question, Answer, Correct, Incorrect, Partially Correct, and Incomplete.
Storyboard Templates – Continued

**CLICKDRAGIMAGE:** Contains Question, Drop Image and up to 9 Drag Images. JPG or PNG only. Graphic Images can be sized (based on Hot Spot size) anywhere on the screen. Total work area 640x385. Multiple correct answers (1-9). Audio files consisting of Question, Answer, Correct, Incorrect, Partially Correct, and Incomplete.

**MATCHING:** 8 Statements Left and 8 Statements Right. Software will juggle statements. User to click Left statement and Right statement for match. Audio files: Landing, Incomplete, Correct, Incorrect, and Partially Correct.

**FULL SCREEN GRAPHIC:** Supports Graphic image to maximum size of 1024x768x72dpi (JPG only), Audio File. Bottom 80 pixels of image are opaque due to window navigation bar.

**FLASH:** SWF, JPG, PNG, images, 640x385. Smaller images will be centered. Audio File. Narration Box optional, size adjustable. Audio can be embedded in SWF file.

**Q2A STILL:** Image 640x385. Question Audio. Question Text displays on image. 9 text answers display on image; 1 correct answer. Answer choices can be labeled or translucent. Self-Check & Training Module (w/remediation).
Storyboard Templates – Continued

**Q2 STILL**: same as Q2AStill, except 9 transparent **hotspot** answer areas on image. **One correct hotspot answer** area. User will see green checkmark or red X for answer display. Training Module only with 9 Audio Remediation files.

**Q3 STILL**: same as Q2Still, except **multiple correct** hotspot answer areas. Training Module only with 9 Audio Remediation files.

**SelfEval**: Supports 1 Graphic JPG, 1 Header Text, 1 Question, & 9 Hot Spots. Image can be manually resized; Maximum image 640x385. Audio files: Question, Incomplete. User answers are tracked and displayed on SeSummary board of the same module.

**SeSUMMARY**: this storyboard is created after the series of SelfEval storyboards. Displays Header Text, User Answers and Correct Answers. 1 Graphic Image.

**LINK_URL**: Must enter a complete Web address (including http://) for asset. Will display web pages, PDF, PPS, DOC, JPG files. 700 pixels for centering. PDF files (preferred) are printable and savable. Asset application program must exist on user computer for asset to display.

**BUTTONS**: This storyboard imparts information to the user by use of a series of storyboards to explain a concept. Contains images as hyperlinks. Mouse over the image and a hand icon appears. Clicking the image takes the user to a series of boards (all with same storyboard number.) Graphic image to maximum size of 640x385. 9 maximum Hot Spot areas.
Creating Storyboards

Double-clicking on the Storyboard icon will open the **Editor Property** window:

![Storyboard Editor Property](image)

Click the **Property** icon to open the Editor Property to select **Storyboard Type**, Upload **Audio**, and type in **Narration** text then select OK.

Uploading Assets

Double-click on image area (above left arrow) to upload **Graphic** or **Video** asset. (Double-click upload folder (above arrow right) to open upload window to upload **Audio**. Example **Upload** Screen:

![Upload Graphic Window](image)

**Step 1:** Click **Browse...** button to search for and select your file to upload.

**Step 2:** After selecting your file, click the **Upload** button.

**Step 3:** You will then receive this ‘**File uploaded successfully**’ window. Click **Close** to proceed.
Formatting Storyboards

The format bar appears across the top of each storyboard. Storyboard text that is added in **Element Text** Boxes, **Narration Text** Boxes, **Header Text** Boxes and **Question Text** Boxes can be formatted with the help of the buttons seen on the Formatting Panel depicted below:

- Format options: include the ability to change font color and size, Bold, Italicize, Underline, and Align text.

Select from the drop down list above to determine what the element will be: **Header**, **SubHeader**, **Bullet**, **Text**, or **Image**.

Previewing Storyboards

Select the **Preview** icon from the Formatting Panel or the **Preview** button at the bottom of the storyboard to preview the storyboard.

Click the **OK** button to save the storyboard.
Questions with Remediation

Training Modules may contain Questions. These questions can be designed to provide remediation if the question is not answered correctly. Remediation is the process of directing the user back to the learning screen (storyboard) which contains the correct answer to the question. The purpose of this type of questioning technique is to reinforce learning, to test comprehension and to keep the user from proceeding forward if they have not grasped the material.

Steps to Creating Questions with Remediation:
1) ALL remediation questions are created in a “Training Module” as part of a lesson.
2) Create the storyboard question and answers as you would for a test question.
3) The “Property” screen affiliated with each multiple-choice answer is what differentiates a test question from a remediation question.

Example Question with Remediation Storyboard:

#1 - Highlight a multiple-choice response that is the wrong answer; then click the “Property” icon (see #2 to the right). Repeat this step for each wrong answer.

#2 - Click the “Property” icon to open the “Distractor Property” window below.

Drag and Drop the storyboard icon(s) from the Available box to the Assigned box that the user is to be remediated back to for the correct answer.

NOTE:
Question Storyboards created in Training Modules can only be moved to Self-Check modules if they are unassigned first and the Question Editor Property is updated.
Test Questions & Question Banks

Steps to Creating Test Questions:
1) **All Test Questions** in the course must be created in the “Self-Check” Module
2) Only 2 storyboards are available; all others are translucent. Click on the Q storyboard (example below) to create a text question (or q2a still for a visual question).
3) Click “Property” icon (upper right corner, shown with red circle) to open “Question Editor Property” window (below) and select the “Storyboard Type” (number of possible answers)
4) Type the question and each possible answer in their designated locations
5) Click “Property” icon (red circle) to upload Audio asset and select Question Bank number; Click on Graphic image to upload Graphic asset

Enter Question and Answers here. Select which choice is the correct answer (will show on screen with checkmark over the letter, as depicted.)

Select the storyboard type from the drop down list: **QUESTION** denotes the storyboard type; the number (i.e. 4) denotes number of multiple choice answers on the screen.

**Test Module** is auto-selected because this storyboard is being created in a **Self-Check** module. This can only be changed or moved to a **Training Module** by unassigning the storyboard first and updating the Question Editor Property Screen in the **Unassigned Storyboard** area.

Select **Question Bank** or create new one. Each question belongs to a question bank. Only variations of same question belong in same question bank. All questions will default to one (same) question bank if one is not selected. (This results in only one question showing on test.)
Content Administrators Can **Add, Edit** and **Delete** storyboards in each course chapter. HTML5 CustomEase will work in Desktops, Laptops and Tablets.

**HTML5 Asset Formats**

*The following file formats are system compatible.*

<table>
<thead>
<tr>
<th>Audio</th>
<th>MP3 format</th>
</tr>
</thead>
<tbody>
<tr>
<td>Video</td>
<td>MP4 format</td>
</tr>
<tr>
<td>Graphics</td>
<td>JPG, JPEG, PNG</td>
</tr>
</tbody>
</table>

Helpful tips:

- **Documents:** PDF preferred
- **File size limit:** 75MB

**Graphics – JPG, and PNG file formats** can be used. Images created at **400x600** pixels will fit image windows.

**NOTE:**

Raw file formats such as: TIF or BMP are not accepted; you will need to convert to JPG, JPEG, or PNG format.

**Audio – MP3.** Good quality audio can be created at 32 Kbps, 44.1 KHz, 16-bit, mono, and CBR.

**NOTE:**

Raw file formats such as: WAV, CDA, and AIF are not accepted; you will need to convert to MP3 format.

**Video – MP4**

**NOTE:**

Raw file format such as AVI, MPG, and MOV are not accepted; you will need to convert to MP4 format.

**Using CustomEase – HTML5 Storyboard Editor**
To access **CustomEase**, open the course and open a Training Chapter from the Course Menu:

![Image of CustomEase](image)

At the bottom left select the **Customize this storyboard** icon to open the HTML5 course editor and begin editing the storyboard.

**NOTE:** CustomEase has limited functionality compared to the Authoring Tool. In CustomEase the Course Menu cannot be modified.
Navigating HTML5 CustomEase

The navigation icons for HTML5 CustomEase are located at the bottom and top left side of the screen:

When you hover your mouse over a Navigation Icon, text displays that describes the functionality of the Icon.

The navigation icons for HTML5 CustomEase are located at the bottom and top left side of the screen:
Preparing to Customize Your Interactive Course

1. **Review Course & Determine Changes.** A thorough review of the existing course is recommended to determine what changes will need to be made to ‘customize’ the course.

2. **Document Changes.** Document the course chapter and storyboard number of the storyboard that will need to be changed or deleted. Document the exact location you want to add a new storyboard to the course. Storyboards will be added immediately following the selected storyboard. *Note: Within CustomEase, the Course Menu cannot be modified; nor can storyboards be moved around within the course.*

3. **Develop and Organize Course Assets.** Assets are digital files that contain essential course content. They include audio, video, graphics, and text files. Before customizing a course, make sure your assets meet the following criteria:
   a. You must have legal right to use the assets;
   b. The assets are in a final format

   *NOTE: The CustomEase Tool does not provide the capability convert assets*

4. **Asset Housekeeping**
   a. Store assets in a convenient directory structure; using common naming convention for all assets
   b. Create a folder for the course, named after the course to hold all assets
   c. Create sub-folders for Graphics, Audio, Video and Text
Adding Storyboards

Click the **Add Storyboard** Icon in the lower left-hand corner and the New **Storyboard Selection** page will open, as depicted below:

Select a Storyboard by clicking twice on its icon or clicking once and selecting OK.

Each Storyboard icon is described in more detail in the upcoming pages.
Storyboard Types

There are 5 Types of Storyboards: Streaming, Recall, Still, Link_URL, Question.

- **Streaming** storyboard is the only one that can contain video clips MP4 is the only file format it is designed it accept. It cannot accept JPG, MP3 or any other type of file format.

- **Recall** storyboards are templates that include text and audio that give direction for reviewing a chapter. The templates can be modified or used without update. There are 3 types of Recall storyboards.
  - **Recall Initial** (Intro Recall or Recalls that are not followed by self-check)
  - **Recall Subsequent** (Recall before self-check)
  - **Recall Final** (Summary Recall board linking to all chapters, before final test)

- **Still** storyboards are designed to accommodate JPG, PNG, files for the Graphic upload and MP3 files for the Audio upload. They are not designed to accept MP4 Video files

- The **Link_URL** storyboard is designed accept a web address (select http:// or https:// and enter complete URL with www). This storyboard can be used to direct the user to a website or to attach a document within the course.

- **Question**. Comprehensive Test questions pull from course chapter recall questions. All questions pulled randomly from question banks.
**Storyboard Templates**

**Supports MP4 file format no larger than 75MB.**

Asset or file may be from another server; ie a video from your company network
Asset may be from another storyboard
Asset may be your file on your computer

**Review Storyboards Recall Initial, Recall Subsequent and Recall Summary**
include preloaded text and audio that cannot be edited. The first course chapter uses Recall Initial, chapters between the first chapter and the summary chapter use Recall Subsequent and the last or summary chapter uses Recall Final. Text and Audio may be updated via the property window.

**STILL**: Supports 1 to 9 Graphic Image(s) 400x600 pixels JPG, PNG, Narration Box, Audio file. Audio file must be loaded before multiple graphic files can be uploaded and inserted into the course, Graphic and Element text are changed based on the audio cue point.

**LINK_URL**: Must enter a complete Web address (including http://) for asset. Will display web pages, PDF, PPS, DOC, JPG files, PDF files (preferred) are printable and savable. Asset file application program must exist on user computer for asset file to display.

**QUESTION**: Question with 2 to 4 text answers fields (only answer fields with text display). **1 correct answer. Audio File.** Summary & Training Chapter.

**QUESTION BANKS**: Contain multiple variations (i.e. 4) of a question. One variation from each bank will appear in Tests.
Uploading Assets – Streaming Editor Property

When you select the **Streaming** Storyboard you will **need** **Upload** and **Insert a Video file**.

The question icon displays **help details** for the different location that Assets are uploaded from.
Still storyboard **Audio** should be **added first** since graphics are changed based on the audio cue. point (see below).

Note: 600 x 400 pixel image size set for all screens.
Uploading Assets – URL Editor Property

Select http or https then include Full URL; www. must be included.

Uploading Assets – Recall Editor Property

There are 3 selections for the Recall Storyboards;

- **Recall Initial**, - The first course chapter uses the Recall Initial storyboard – questions may follow this Recall storyboard but usually don’t.

- **Recall Subsequent**, - The chapters between the first chapter and the summary chapter use the Recall Subsequent storyboard.

- **Recall Final**, - The last or summary chapter before the Comprehensive Test uses the Recall Final storyboard.
Uploading Assets – Recall Editor Property – Continued

Recall Initial

Recall Subsequent

Recall Final

Note: The narration text and the audio file can be modified in the storyboard property window.
After you select the Recall Storyboard and select OK you can add **Key Term recall/review content** to the Key Term field. Select the Key Term Text field then the Property Icon; the Key Term Element window (as depicted below) will display.

**Key Term Element Types** can be **Header, Subheader, Bullet or Text**.

**Key Term Definition Types** can be **Text, an Image, Video or Storyboards**.

The **Recall Final Storyboard Key Term Elements link** back to previous course chapter Recall Storyboards.
If a Chapter includes a Recall storyboard then the Question storyboard is not available in the Add Storyboard screen. **All Question storyboards must be added after the Recall storyboard.**

Enter Question and Answers text. Select the **correct answer** (correct answer shows on screen with checkmark over the letter, as depicted.)

Only populated answer fields will display; **empty answers will not show.**

Select **Question Bank** or create new one. Each question belongs to a question bank. Only variations of same question belong in same question bank. All questions will default to one (same) question bank if one is not selected. (This results in only one question showing on test.)
The format text toolbar automatically displays when you select text.

Format options: include the ability to Bold, Italicize, Underline, Bullet, and Align text and change Text Color and Size.

The format text toolbar displays in the Property Window for Recall Key Terms, Recall Definitions, Narration Text, Question Header Text, Question Text and Distractor Text. Text must be selected to format.
Preview and Save Customizations to Storyboards

Select the **Preview Icon** to Preview the course.

Select the **Return Icon** to get out of Preview.

Select the **Save Icon** to Save the updates to the course.
Deleting Storyboards

When you select the Delete Storyboard icon a message displays prompting you to select Yes to Delete and No to Cancel Delete and keep the storyboard.