



# System Administrator LMS Training Guide

Learning Management System Logout

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<< **LMS Home** Learning

 <b>User Management</b> <ul style="list-style-type: none"><li>&gt; Users</li><li>&gt; Groups</li><li>&gt; Roles</li><li>&gt; Supervisor Transfer</li></ul>	 <b>Training Management</b> <ul style="list-style-type: none"><li>&gt; Curriculum</li><li>&gt; Courses</li><li>&gt; Course Options Template</li><li>&gt; Feedback</li><li>&gt; Certificates</li><li>&gt; Reset Training Data</li><li>&gt; Classroom &amp; Hands-On Scores</li></ul>	 <b>Content Management</b> <ul style="list-style-type: none"><li>&gt; Course Authoring Permission</li><li>&gt; CustomEase Courses</li></ul>
 <b>Settings &amp; Configuration</b> <ul style="list-style-type: none"><li>&gt; Global Options</li><li>&gt; Application Configuration</li><li>&gt; E-Mail Notification</li></ul>		 <b>Report Management</b> <ul style="list-style-type: none"><li>&gt; Reports</li></ul>

Name: \_\_\_\_\_

Customer ID: \_\_\_\_\_

URL: [http://\\_\\_\\_\\_\\_LMS.claritynet.com](http://_____LMS.claritynet.com)

Your Login: \_\_\_\_\_ / \_\_\_\_\_

Technical Support: 800-946-8584

# Table of Contents

Initial Set Up of the Learning Management System .....	1
Site Branding and Design .....	1
Login Page Graphics.....	1
Display Settings .....	2
The End-User Experience.....	3
The Learning Tab.....	3
Course Training Details.....	4
Interactive Courseware .....	5
Users .....	6
Adding/Editing Users.....	6
User Access Boundaries.....	8
User Training Assignments .....	8
Notify Users – Instant E-Mail to Users .....	9
View Training History .....	10
View Inbox.....	10
View Learning Tab .....	11
Groups.....	12
Roles .....	13
Creating a Role .....	14
Role Permissions .....	14
Assignments.....	16
Supervisor Transfer .....	17
Global Options .....	18
Information/Login Settings/Company Graphics.....	18
Edit Group Type Names.....	19
Application Configuration .....	20
Groups – Activation/De-activation .....	20
E-Mail Notification .....	21
Adding E-Mail Notifications .....	22
List of Available E-Mail Notifications: .....	23
Curriculums.....	26
Adding/Creating Curriculums .....	26
Adding Courses to a Curriculum .....	26
Arrange Courses in a Curriculum .....	27
Course Options Template .....	28
Modules – Modifying the Menu Structure of Courses.....	28
Assignments.....	29

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Courses .....	30
Edit Courses.....	30
Assignments.....	31
Properties.....	31
Course Options Template .....	32
Course Options .....	33
Feedback.....	38
Certificates.....	39
Adding and Editing Certificates .....	39
Adding Content to a Certificate Template .....	40
Assigning Certificate Templates.....	40
Reset Training Data .....	41
Classroom & Hands-On Scores .....	42
Reports .....	45
Filter Report Criteria.....	45
Using the Report Filters.....	46
Processing a Report.....	46
Exporting/Printing a Report .....	47
List of Available LMS Reports: .....	47
Creating a New/Custom Report .....	49
Course Authoring Permission .....	52
Asset Formats – Summary.....	53
Asset Formats – Detail.....	54
CustomEase .....	55
Using CustomEase – Storyboard Editor.....	56
Navigating CustomEase – Options .....	56
Preparing to Customize Your Interactive Course .....	57
Adding Storyboards .....	57
Storyboard Types.....	58
Storyboard Templates - 1.....	59
Storyboard Templates - 2.....	60
Storyboard Templates - 3.....	61
Storyboard Templates - 4.....	62
Creating Storyboards .....	63
Editor Property .....	63
Uploading Assets .....	63
Formatting Storyboards .....	64
Previewing Storyboards .....	64
Questions with Remediation .....	65
Test Questions & Question Banks .....	66

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## 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:*



### ICON KEY

Valuable

information

Tips and Tricks

Popup Blockers turned **OFF**, or allow popups from **\*.claritynet.com** and **\*.training.dupont.com**

Recommended minimum screen resolution 1024 x 768

Adobe Flash Player installed, version 9.0 or higher

Internet Explorer installed, version 7 or higher

Latest Windows Media Player installed, operating system dependent

### For the IT Department:

- Ensure that firewall is not blocking:
  - a) Video or Audio data
  - b) Anything from “**claritynet.com**” domain and “**training.dupont.com**” domain

Ensure [noreply@claritynet.com](mailto:noreply@claritynet.com) is on the network SPAM filter’s “white list”, if E-mail Notification is used.

## Site Branding and Design

### LOGIN PAGE GRAPHICS

**DuPont™ eLearning Suite**  
LEARNING MANAGEMENT SYSTEM

Application Logo; image size 200x64.  
Uploaded in **Global Options**.

### User Login

To enter LMS, enter the requested information and click Submit.

[Add this page to your favorites.](#)

Welcome to the Learning Management System!

### Login Information

User ID

Password

Reset

Submit

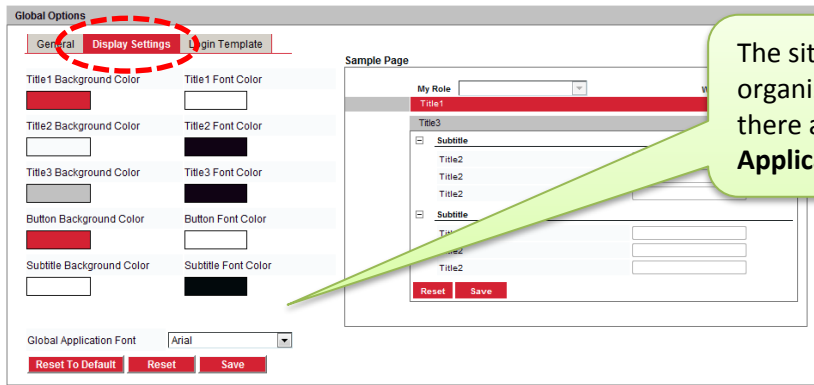
Areas above and below the **Login Information** can contain customized text. Created in **Global Options-General** tab.

If you experience any issues, please contact Jane Smith at 1-747-555-1212

Forgot Your Password? [Click here.](#)

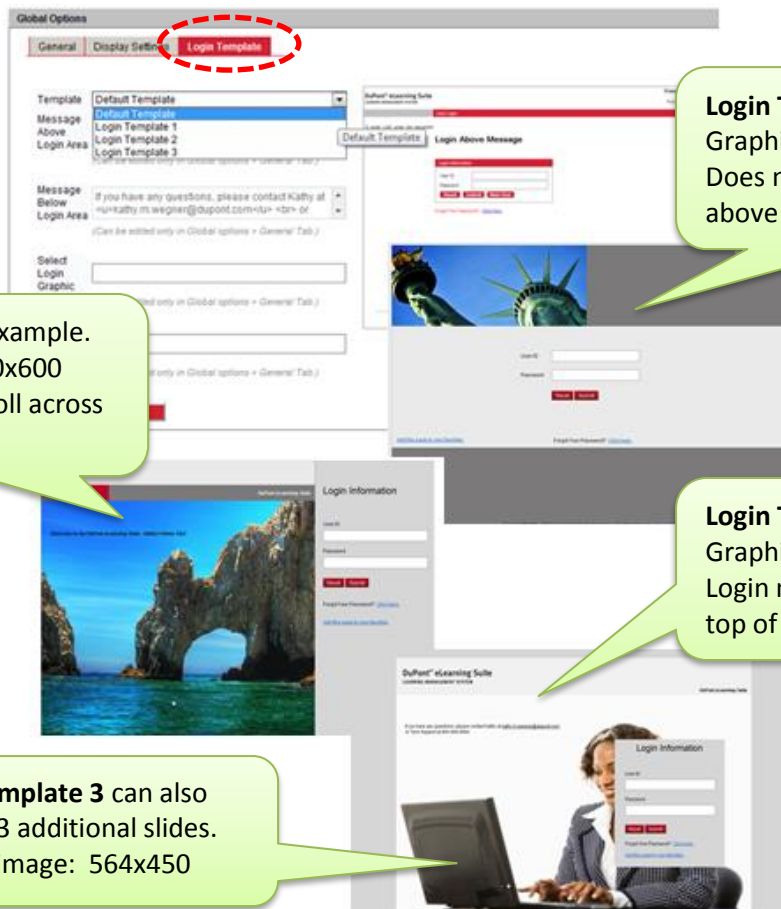
## DISPLAY SETTINGS

System Admins with Permissions can brand their site under **Global Options**. Use the **Display Settings** tab to change colors and font style.



The site can be branded with organizational colors, and there are eight **Global Application Font** styles

Under the **Login Template** tab, multiple templates are available for changing/customizing the login screen.



**Login Template 1** Example.  
Graphic image: 400x200  
Does not support messages above or below login area.

**Login Template 2** Example.  
Graphic image: 700x600  
Login messages scroll across top of screen.

**Login Template 3** Example.  
Graphic image: 1000x600  
Login messages scroll across top of screen.

**Login Template 3** can also support 3 additional slides.  
Graphic image: 564x450

# The End-User Experience

## THE LEARNING TAB

The **Learning Tab** lists all assigned Courses.

My Role Employee User Font Size [A] [A] [A] demo demc

Learning Management System Logout

<< Learning

Course Name	Language	Category	Course Due Date	Type	Status	Feedback
<b>101 General Safety Training for All Employees</b>						
<b>Required Training - All Employees</b>						
* <a href="#">Diversity: The Real Scene (DIVFEFV)</a>	English	Ethics & Compliance	01/01/2016		Certification Due	
This course is designed to heighten participant's awareness of diversity in the workplace. The multitude of scenarios invite participants to think about what behaviors are discriminatory, how coworkers can learn to work together and what their responsibility is regarding the treatment of others.						
* <a href="#">Ethics: The L.O.G.I.C. of Right (ETH1EFV)</a>	English	Ethics & Compliance	-		InProgress	
This course provides a fresh opportunity to explore ethical decision making in the workplace. Through a variety of scenarios, the user is encouraged to consider the values at conflict in the situation and apply the L.O.G.I.C. system of ethical decision making.						
* <a href="#">Harassment Is Industrial Version (HAR8EFV)</a>	English	Ethics & Compliance	-		Expired	
This course provides participants an opportunity to examine harassment in the workplace and ways to eliminate the problem.						
* <a href="#">Ergonomics: Solving the Puzzle (ERGAEFV)</a>	English	Safety	-		Not Started	
This course explains how making changes in your workplace may reduce the stress on your musculoskeletal system. It discusses the signs and symptoms of musculoskeletal disorders and explains the causes and prevention of musculoskeletal disorders. The course discusses the solutions to prevent musculoskeletal disorders and also illustrates how ergonomic solutions make work less tiring, demanding, and difficult.						
* <a href="#">PPE: Don't Start Work Without It (PPE7EFV)</a>	English	Safety	-		Started	
This Course deals with educating the employees about wearing the appropriate personal protective equipment for protection from the on-the-job hazards.						

LMS Course Status Labels: **Not Started, Started, Mastered, InProgress, Expired, Certification Due.**

The Employee User Experience:

DuPont™ eLearning Suite  
LEARNING MANAGEMENT SYSTEM

My Role Employee User Gonzales James Logout

Applications: Learning Management System

Welcome James  
Your last visit was 8/6/2014 03:08 PM  
[Inbox](#)

Search

Calendar: 2014

<< Learning

Course Name	Language	Category	Course Due Date	Type	Status	Feedback
<b>General Training for All Employees</b>						
* <a href="#">New Hire Orientation (ABC101)</a>	English	Other			Not Started	
Overview of company's policies and procedures						
* <a href="#">Defensive Driving (DEFSEFC)</a>	English	Safety			Expired	
This training course will explain the importance of driving defensively, how to prepare your vehicle and yourself for the road, how you can stay focused and prevent distractions while driving, demonstrate safe driving procedures in the city, on the freeway and on the country, how to deal with adverse weather conditions and handle other emergencies.						
* <a href="#">Ergonomics: Solving the Puzzle (ERGAEFV)</a>	English	Safety			Started	
This course explains how making changes in your workplace may reduce the stress on your musculoskeletal system. It discusses the signs and symptoms of musculoskeletal disorders and explains the causes and prevention of musculoskeletal disorders. The course discusses the solutions to prevent musculoskeletal disorders and also illustrates how ergonomic solutions make work less tiring, demanding, and difficult.						
* <a href="#">Arc Flash: Live to Tell! (ELE016EFV)</a>	English	Safety			Not Started	
This course helps those who work with high voltage equipment to protect themselves and others against an arc flash occurrence. This course explains the causes of an arc flash and the dangers of an arc flash explosion. It also discusses the safety precautions and PPE guidelines that can help prevent arc flash related injuries.						
<b>Additional Learning</b>						
* <a href="#">Business Ethics and the FCPA (FBUS09EFV)</a>	English	Ethics & Compliance			Not Started	
This course outlines rules and guidelines for conducting business fairly around the world with foreign government officials and their agents, your customers and suppliers. The course will show you how to have financial records fairly reflect your global business. During this program you will have an opportunity to identify the standards under the Foreign Corrupt Practices Act (FCPA).						

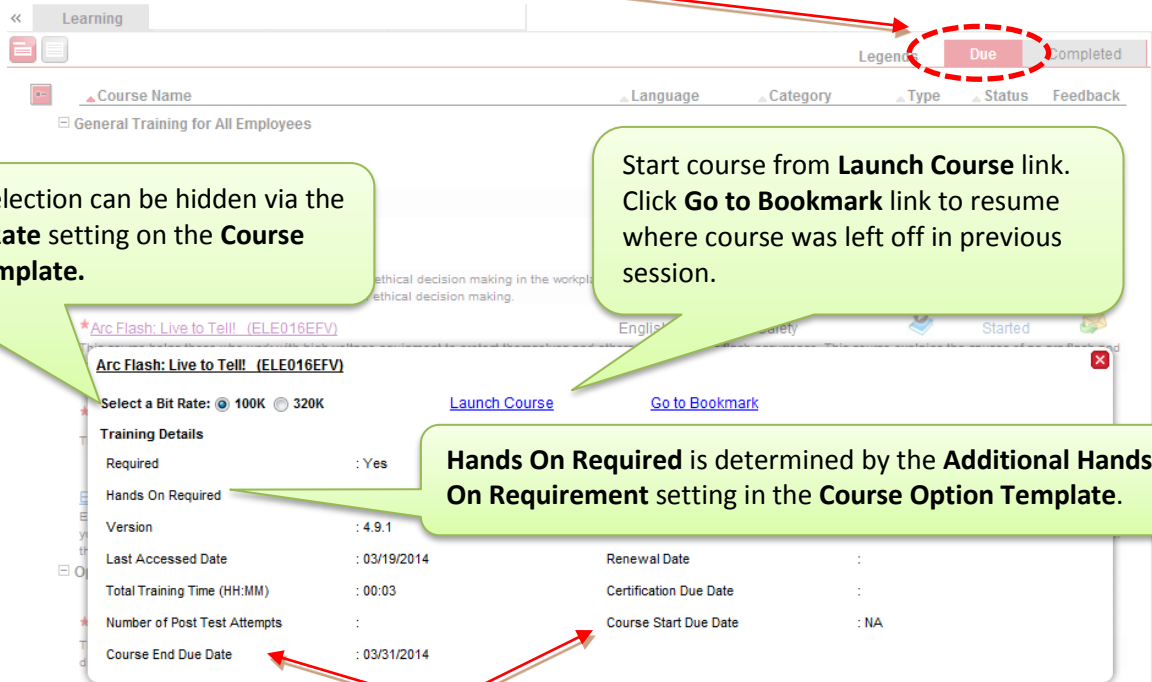
Email Notifications go both to the user's email address and to their LMS Inbox.

Courses can be listed in **Course View** or **Curriculum View**. Default can be set in **Global Options**, as well as set to appear **Expanded** or **Collapsed**.

Learning Tab layout lists assigned **Curriculums** first, then **Additional Learning** (courses assigned directly to user).

**COURSE TRAINING DETAILS**

From the **Employee User Role**, click the Course link to launch the course (from pop-up window) and see **Training Details** about the Course. Courses due to be taken appear on the User's Learning **Due** tab.



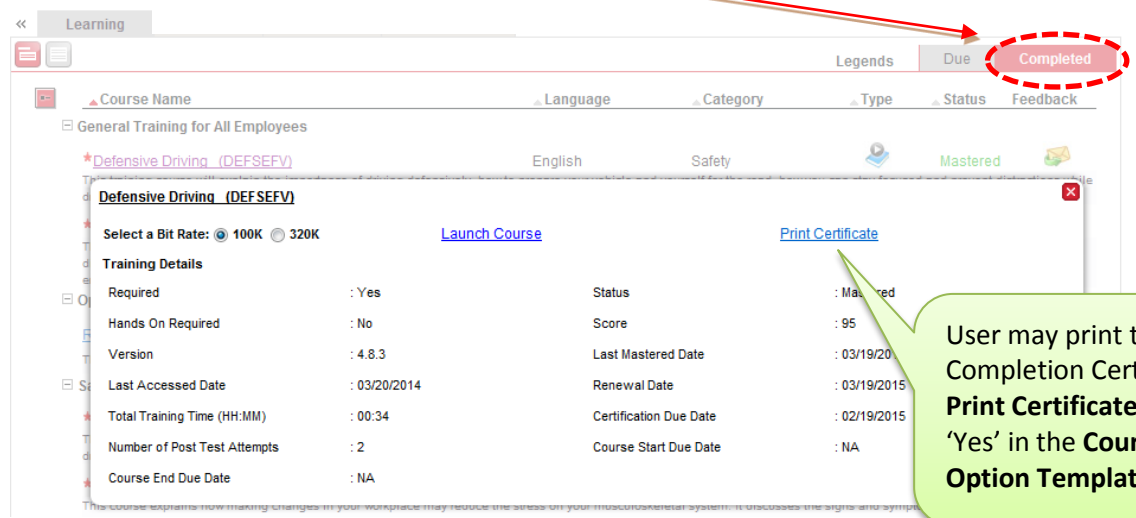
Bit Rate Selection can be hidden via the Show Bit Rate setting on the Course Option Template.

Start course from **Launch Course** link. Click **Go to Bookmark** link to resume where course was left off in previous session.

**Hands On Required** is determined by the **Additional Hands-On Requirement** setting in the **Course Option Template**.

**Course Start Due Date** and **Course End Due Date** are determined by the **Course Available Date** and **User Should End Course** settings in the **Course Option Template**.

When Courses are Completed/Mastered, they will automatically be moved from the Learning **Due** tab to the **Completed** tab.



User may print their Completion Certificate if **Print Certificate** is set to 'Yes' in the **Course Option Template**.

INTERACTIVE COURSEWARE

Electrical Safety: Beware the Bite

DuPont™ eLearning Suite  
INTERACTIVE COURSEWARE

Wegner Kathy

Levels of Protection

Conductivity

1 / 5

**Conductors**

- Materials with low resistance
- Used for wires, switches and electrical connections
- Copper, aluminum, mercury and water are conductors

User may post **Comments** (public) if **Show Comments** is activated in the **Course Option Template**.

User may post **Notes** (private) if **Show Notes** is activated in the **Course Option Template**.

If you've worked around electricity, you know that, materials with low resistance are called conductors and used for wires, switches and electrical connections. Copper has almost no resistance to electrical current flow. So many wires have multiple cores. Other metals such as aluminum and liquids like mercury and water are also good

Version 4.0.0.170

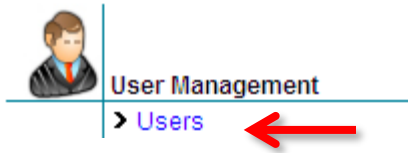
SEVEN SKIN OPTIONS TO CHOOSE FROM:

The image displays seven different skin options for the DuPont eLearning Suite courseware. Each skin is shown as a screenshot of the courseware interface with a different color scheme and layout. The skins are labeled as follows:

- AQUA:** Light blue background with a video player and text area.
- APPLINET:** Dark red background with a video player and text area.
- ICEBLUE:** Light blue background with a video player and text area.
- IGRAY:** Dark gray background with a video player and text area.
- MIRACLE:** Light red background with a video player and text area.
- NATURE:** Light green background with a video player and text area.
- WOODS:** Light brown background with a video player and text area.



# Users



It is recommended that users initially be added to the LMS database using a batch process (electronic user import) versus adding individuals manually. The **Users** section can be used to make individual edits to users, as well as to add new users and de-activate users manually.

Select the **Click to Show Records** button to view the all records in the database.

**User List**

Filter Users

Region, Business Unit, Division, Department, Job Code, Job Title, Location, Shift, Cost Center, EEO Category, Roles

Current Filter

No Filter

**Click to Show Records**

For specific results, use any of the Group Filters to shorten the User list. Select the **Click to Show Records** button to populate User List.

The **Add, Edit** buttons are located at the bottom of the **User List** dialog box to help system administrators modify user profiles as needed.

## ADDING/EDITING USERS

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.

General | Access Boundaries | Training Assignments

[-]

Identification

User ID	scarter	User ID Character Limit: 256 characters, alphanumeric and no spaces. Can accommodate email addresses. Can be edited.
Last Name	Carter	Last & First Name Character Limit: 64 characters
First Name	Sam	
Email ID	scarter@training.dupont.com	Email ID Character Limit: 512 characters
Confirm Email ID	scarter@training.dupont.com	
Status	Active	
Supervisor Name	Smith Jane (Jsmith)	A User's Supervisor can be identified for Reporting and to be copied on E-Mail Notifications.
Supervisor	<input checked="" type="checkbox"/>	
Instructor	<input type="checkbox"/>	
Force Password Change On Next Login	<input type="checkbox"/>	Checking "Force Password Change" here will only apply to this user. To apply to ALL users, use Global Options setting.
Proctor Post-Test	<input type="checkbox"/>	

Authentication

Password

Confirm Password

Roles

Available Roles

Search

System Admin

Assigned Roles

Search

Backup System Admin  
Employee User

Default Role

Select all the **Available Roles** that will apply to this user. Highlight and use the > icons to assign **Roles**. Also select their **Default Role**.

Group Assignments

Region	Business Unit	Division	Department	Job Title	Code	Location	Shift	Cost Center	Group
<b>Assigned Groups</b>									
Region	US - Northeast x								
Business Unit	APU x								
Division	Manufacturing x								
Department	Distribution x								
Job Title	QA Tech x								
Code	156987 x								
Location	Boston MA x								

Select the specific **Groups** the user is assigned to. (This section will be auto-populated during User Import; and can be edited).

*Note: If Course or Curriculum Assignments have already been set up using one of these Group Types, the user will automatically be assigned to their designated Course(s) and/or Curriculum(s).*

Access Boundaries Groups

Available Groups

Search

Region  
Business Unit  
Division  
Department  
Job Title  
Code

Assigned Groups

Search

-- None --

User Preferences

Language

Skins

Date Format

Time Format

Time Zone

Select User preferred **Language, Skin, Date & Time Format** and **Time Zone**.

*Note: Users (with permissions) can edit their own information (from 'Change Profile' link in left column by clicking **Applications** bar.)*

## USER ACCESS BOUNDARIES

Under the user's **Access Boundaries** tab the system administrator can assign the user to Groups, Curriculums, and Course Option Templates that the user should have access to. The settings here will serve as a filter for this user when they run Reports, make Training Assignments and view their Users list. The user will only see the Groups/Curriculums/Course Option Templates and Users for which they have been assigned.

Select your **Group, Curriculum, or Course Options Template** from the **Assignment Type** dropdown list.

Select the relevant group name(s) from the **Available** list and use the arrow keys to move selected item(s) to the **Assigned** box (by clicking the **Save** button).

In this example, this administrator will only have access to the US-Mid-Atlantic and US-Northeast list of users; all other users will be inaccessible.

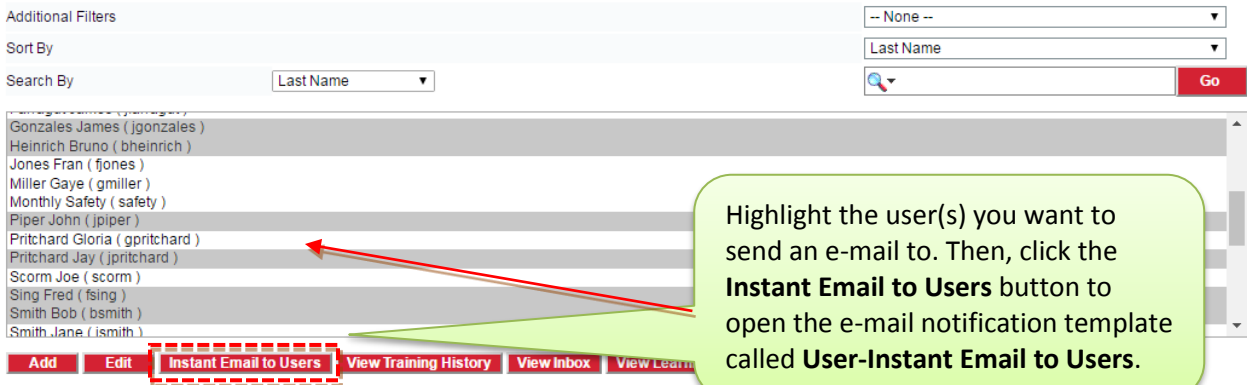
## USER TRAINING ASSIGNMENTS

System administrators can view a user's training assignments by clicking the **Training Assignments** tab. This tab is for viewing purposes only; no changes can be made here. All training assignments are made from the **Assignments** tab within **Curriculums** or **Courses**.

**View** a user's training assignments to see what Courses and/or Curriculums they are assigned to. Training Assignments are made from the **Assignments** tab within Curriculums or Courses.

## NOTIFY USERS – INSTANT E-MAIL TO USERS

System administrators can send out Ad Hoc Instant E-Mail Notifications to any registered user appearing on the User List simply by selecting the User Name(s) and clicking the **Notify Users** button to create an e-mail that will be sent out immediately to the designated recipients.



Additional Filters: -- None --

Sort By: Last Name

Search By: Last Name [Go]

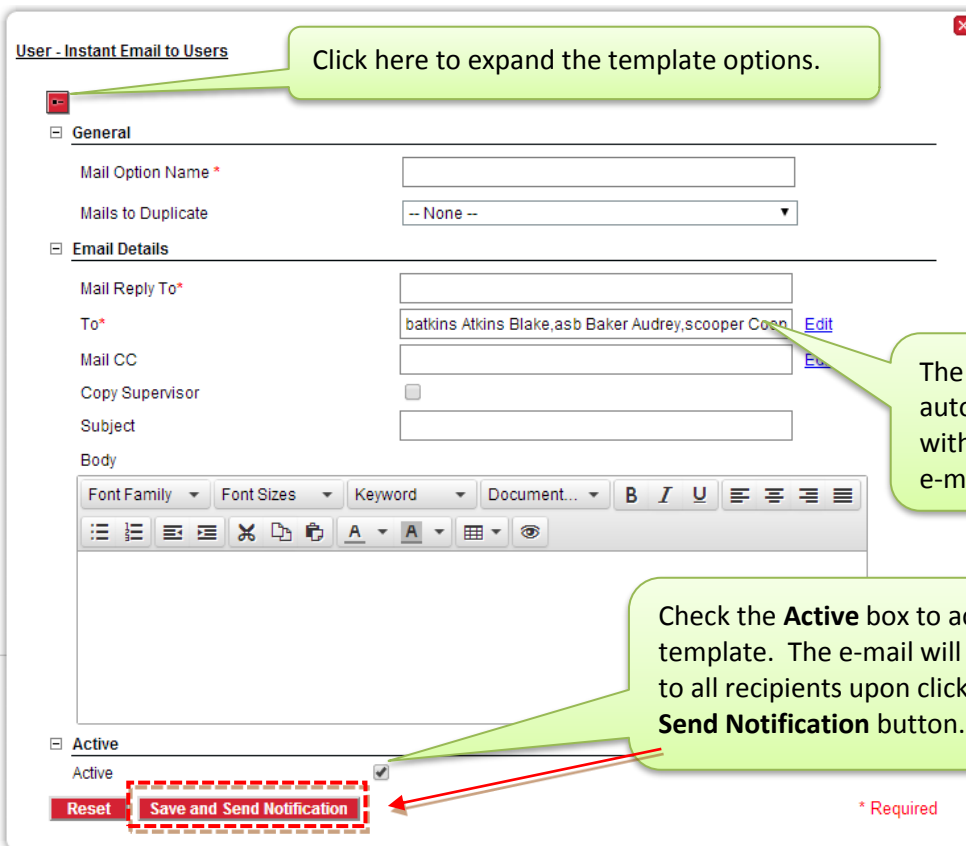
User List:

- Gonzales James ( jgonzales )
- Heinrich Bruno ( bheinrich )
- Jones Fran ( fjones )
- Miller Gaye ( gmiller )
- Monthly Safety ( safety )
- Piper John ( jpiper )
- Pritchard Gloria ( gpritchard )
- Pritchard Jay ( jpritchard )
- Scorm Joe ( scorm )
- Sing Fred ( fsing )
- Smith Bob ( bsmith )
- Smith Jane ( jsmith )

Buttons: Add, Edit, **Instant Email to Users**, View Training History, View Inbox, View Learning

**Highlight the user(s) you want to send an e-mail to. Then, click the Instant Email to Users button to open the e-mail notification template called User-Instant Email to Users.**

The E-Mail Notification Template will open to create your email:



**User - Instant Email to Users**

Click here to expand the template options.

General

Mail Option Name \*

Mails to Duplicate: -- None --

Email Details

Mail Reply To\*

To\*: batkins Atkins Blake,asb Baker Audrey,scooper Coen [Edit](#)

Mail CC: [Edit](#)

Copy Supervisor:

Subject

Body

Font Family | Font Sizes | Keyword | Document... | B | I | U | [List Icons]

Active

Active:

Buttons: **Reset**, **Save and Send Notification**, \* Required

**The template will automatically populate with the selected user(s)' e-mail addresses.**

**Check the Active box to activate the e-mail template. The e-mail will be instantly sent to all recipients upon clicking the Save and Send Notification button.**

*Note: for more detail on creating e-mail notification templates, refer to the E-Mail Notification section of this training guide.*

## VIEW TRAINING HISTORY

Highlight a User Name from the User List, then the **View Training History** button to view that user's training history, which will open in a separate window. Access to this button is controlled by user Permissions.

**Add** **Edit** **View Training History** **View Inbox** **View Learning Tab**

Note: Unassigned courses are highlighted in red text.

★ - Required

Course/Assessment Name	Classroom Name	Curriculum Name	Start Date	End Date	Status
* Ergonomics: Solving the Puzzle		Basic Safety 101	Anytime	Anytime	Not Started
* CPR and AED: The Chain of Survival		Basic Safety 101	Anytime	Anytime	Not Started
* PPE: Don't Start Work Without It		Basic Safety 101	Anytime	Anytime	Not Started
* Bloodborne Pathogens: Don't Take the Risk!			Anytime	Anytime	Not Started
* Defensive Driving			03/15/2013	03/31/2013	Started

Self Registered Learning  
No Records

**Completed**

Course/Assessment Name	Classroom Name	Curriculum Name	Start Date	End Date	Status	Print Certificate
* Basic Safety 101			Anytime	Anytime	Completed	

Self Registered Learning  
No Records

**You can print this as a quick report. Print icon is located both at top and bottom of the page.**

**Unassigned Course(s) appear in red.**

**Required courses display with an asterisk (\*).**

**User Completion Certificates can be printed from this page.**

**All assigned training is displayed with **Due** Courses at the top of the page and **Completed** courses at the bottom of the page.**

## VIEW INBOX

System administrators with Permissions can highlight a User Name from the User List, then click the **View Inbox** button at the bottom to view the user's inbox, as well as **Forward**, **Resend** or **Print** e-mails. Access to this button is controlled by user Permissions.

**Add** **Edit** **View Training History** **View Inbox** **View Learning Tab**

<< Inbox for Carter Sam (scarter) Pages: 1 2

<input type="checkbox"/>	From	Subject	Received
<input type="checkbox"/>	noreply@claritynet.com	Notify Users Assigned to Course (PPE:zmail)	03/19/2012 3:46:52 PM
<input type="checkbox"/>	noreply@claritynet.com	Notify Users Assigned to Course (PPE:zmail)	03/19/2012 3:42:57 PM
<input type="checkbox"/>	noreply@claritynet.com	Monthly User Course Mastery Report	03/05/2012 9:20:41 AM
<input type="checkbox"/>	noreply@claritynet.com	Monthly User Course Mastery Report	02/06/2012 9:28:03 AM
<input type="checkbox"/>	noreply@claritynet.com	Assignment to Curriculum	01/10/2012 9:50:07 PM
<input type="checkbox"/>	noreply@claritynet.com	Assignment to Curriculum	06/03/2011 5:23:13 PM
<input type="checkbox"/>	noreply@claritynet.com	Assignment to Curriculum	06/03/2011 5:23:13 PM

From: noreply@claritynet.com Sent: 01/10/2012 9:50:07 PM  
To: kathy.wegner@training.dupont.com  
CC:  
Subject: Assignment to Curriculum

Sam Carter,

This is email is to notify you that you have been assigned to the following online training curriculum: Optional Training for Employees.

You may access this curriculum of online training courses by logging into: <http://kathyw.desdmo.claritynet.com> and viewing it from your "Learning" tab.

**E-mails can be Forwarded, Resent, or Printed.**

## VIEW LEARNING TAB

System administrators with Permissions can highlight a User Name from the User List, then click the **View Learning Tab** button to view the user's Learning Due and Completed tabs, just as the Employee User sees it.

Additional Filters: -- None --

Sort By: Last Name

Search By: Last Name

Equivalency Course (equiv)  
Farragut James (jfarragut)  
Gonzales James (jgonzales)  
Heinrich Bruno (bheinrich)  
Jones Fran (fjones)  
Miller Gaye (gmiller)  
Monthly Safety (safety)  
Piper John (jpiper)  
Pritchard Gloria (gpritchard)  
Pritchard Jay (jpritchard)  
Scorm Joe (scorm)  
Sing Fred (fsing)  
Smith Bob (bsmith)

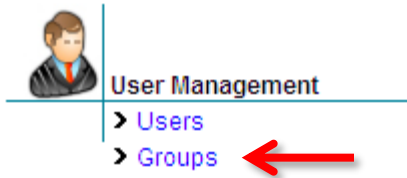
Gonzales James (jgonzales)

Legends: Due Completed

Course Name	Language	Category	Type	Status	Feedback
<b>General Training for All Employees</b>					
<a href="#">* New Hire Orientation (ABC101)</a> Overview of company's policies and procedures	English	Other		Not Started	
<a href="#">* Defensive Driving (DEFSEFV)</a> This training course will explain the importance of driving defensively, how to prepare your vehicle and yourself for the road, how you can stay focused and prevent distractions while driving, demonstrate safe driving procedures in the city, on the freeway and in the country, how to deal with adverse weather conditions and handle other emergencies.	English	Safety		Expired	
<a href="#">* Ergonomics: Solving the Puzzle (ERGAEFV)</a> This course explains how making changes in your workplace may reduce the stress on your musculoskeletal system. It discusses the signs and symptoms of musculoskeletal disorders and explains the causes and prevention of musculoskeletal disorders. The course discusses the solutions to prevent musculoskeletal disorders and also illustrates how ergonomic solutions make work less tiring, demanding, and difficult.	English	Safety		Started	
<a href="#">* Arc Flash: Live to Tell! (ELE016EFV)</a> This course helps those who work with high voltage equipment to protect themselves and others against an arc flash occurrence. This course explains the causes of an arc flash and the dangers of an arc flash explosion. It also discusses the safety precautions and PPE guidelines that can help prevent arc flash related injuries.	English	Safety		Not Started	
<b>Optional Training for Employees</b>					
<a href="#">Harassment Is... Industrial Version (HAR8EFV)</a> This course provides participants an opportunity to examine harassment in the workplace and ways to eliminate the problem.	English	Ethics & Compliance		Started	
<a href="#">Recogn. Alcohol and Drug Abuse for Employees (DRG4EFV)</a> This course provides the tools necessary to recognize drug and alcohol abuse in the workplace.	English	Ethics & Compliance		Not Started	

Note: Although course links are active (will open 'Training Details' page), Courses cannot be launched from this view.

## Groups



There are 12 Main Grouping Fields/Sort Criteria used for making Training **Assignments** (Curriculums), setting **Access Boundaries** and filtering **Reports**.

There are 5 Default Groups named in the LMS: Region (Group 1), Group (Group 2), Division (Group 3), Department (Group 4), and Title (Group 5). These default names can be changed.

Groups can be hidden or displayed under **Groups** in **Application Configuration**.

To rename **Groups**, go to **Global Options** and click **Edit Group Type Names**.

Default Text Group 10  
Custom  \*

\*Required



### NOTE:

Groups will be utilized in the LMS for these important functions: Training **Assignments** (Curriculums), **Access Boundaries**, and **Reports**.

## Adding/Editing Groups

Select the **Group Type** from the dropdown menu to populate Group List window.

Groups List

Group Type

Search

- Accountant
- Administrator
- Driver
- Electrician
- Electrician II
- Engineer
- Engineer II
- Maintenance Tech I
- Maintenance Tech II
- Manager
- Mill Manager
- Mill Operator

Job Title

- Region
- Business Unit
- Division
- Department
- Job Title
- Code
- Location
- Shift
- Cost Center
- Group

Select the **Add** Button to add a new item to the list, or highlight an item and select the Edit button to edit an item.

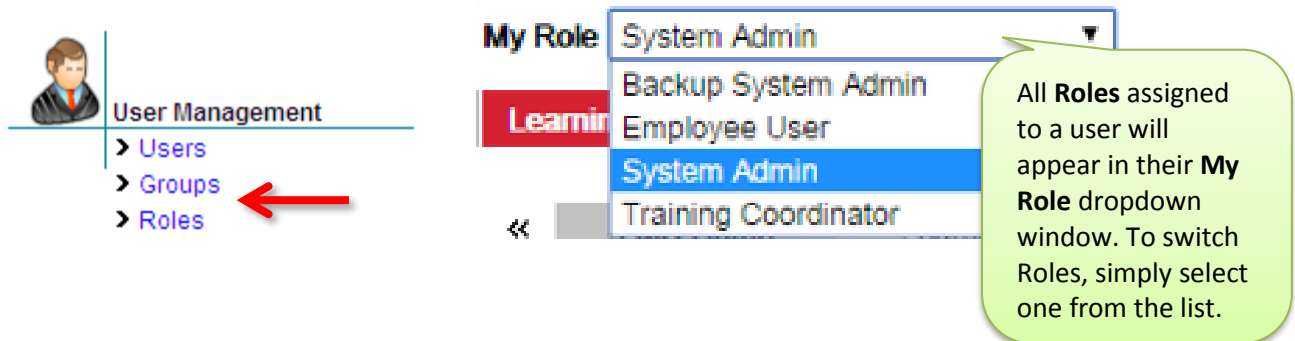
Group - General

Group Type Job Title

Group Name  \*

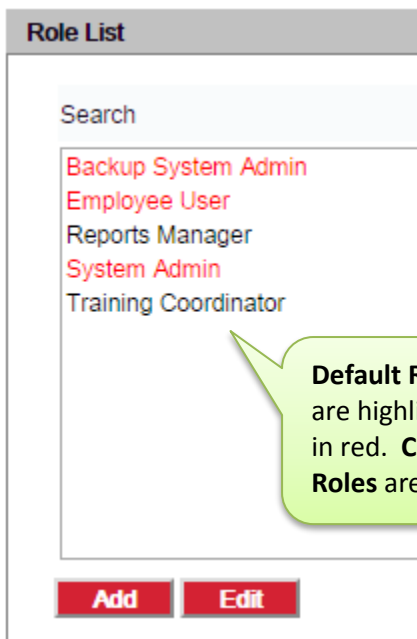
**Character Limit:**  
64 characters,  
alphanumeric

## Roles



The image shows a navigation menu on the left with 'User Management' expanded to show 'Users', 'Groups', and 'Roles'. A red arrow points to 'Roles'. On the right, a 'My Role' dropdown menu is open, showing a list of roles: 'System Admin', 'Backup System Admin', 'Employee User', 'System Admin', and 'Training Coordinator'. The 'System Admin' role is highlighted in blue. A green callout box explains that all roles assigned to a user will appear in their 'My Role' dropdown window and that users can switch roles by selecting one from the list.

**Roles** enable users to access **LMS** features. They are defined by a set of **Permissions** which enables dashboard tabs on the user's dashboard. Based on the task a user needs to accomplish, they can be given either **Read** only or **Full** access rights. Multiple **Roles** can be assigned to a user based on the multiple tasks they need to manage. When multiple Roles are assigned to a user they can toggle between roles by selecting from the **My Role** dropdown menu at the top of their screen. Users with appropriate permission can Add and Edit Roles from the Role List. **Default Roles** (in red) are provided with the LMS; permissions can be edited. New **Roles** can be created, depending upon organizational needs.



The 'Role List' interface includes a search bar and a list of roles: 'Backup System Admin', 'Employee User', 'Reports Manager', 'System Admin', and 'Training Coordinator'. The first four roles are highlighted in red, while 'Training Coordinator' is black. At the bottom, there are 'Add' and 'Edit' buttons. A green callout box states: 'Default Roles are highlighted in red. Created Roles are black.'

### *DuPont eLearning Suite*

#### *Default Roles:*

**Employee User:** Full access to the Learning tab. Only has permission to take assigned courses and has no access to administrator functionality.

**System Admin:** Full access permissions to roles and to LMS functionality.

**Backup System Admin:** Same permissions as System Admin, can be edited.



## CREATING A ROLE

System Admins who have full access permission to **Roles** can add and edit user roles.

**Role - General Information**

**General** | Permissions | Assignments

Role Name: [Text Field] **Role Name:** 128 character limit

Description: [Text Area] **Description:** 512 character limit

Active:  **Active:** Specifies if a role is active or not. Administrators can hide the role from users' access without deleting it by de-selecting the checkbox.

**Roles Security**

Available Roles: [List: Backup System Admin, Employee User]

Assigned Roles: [List: -- None --]

Inherit Permissions of Assigned Roles:  **Roles Security:** Assign roles to restrict users from accessing other roles. Any Role this Role needs to administrate *must* be added to **Roles Security**.

**Inherit Permissions:** By selecting this checkbox, the role being added can duplicate the permissions assigned to the security restricted roles.

Buttons: Reset, Save



A suggested best practice for System Admins when creating a new Role: Move both **Backup System Admin** and **Employee User** from the **Available Roles** box (left) to the **Assigned Roles** box (right) and select the checkbox for **Inherit Permissions of Assigned Roles**. Then when you go to the Role – Permissions tab (next step below), it will be quicker to de-select unneeded functionality vs. re-creating the Role completely from scratch.

## ROLE PERMISSIONS

Once the Role has been created and named, users with full access permissions can then set the **Permissions** and make **Assignments**. First, click on the **Permissions** tab:

**Role - Permissions**

General | **Permissions** | Assignments



In the example below, the Permissions for **User Management**, **Content Management**, and **Settings & Configuration** are unchecked; therefore, the user cannot view these areas. The Permissions for **Training Management** and **Report Management** includes a mix of **Full** or **Read** Permissions, giving the user various access rights to this LMS functionality.

## Administrator Permissions page:

Collapsed View:

Functionality lists can be collapsed by clicking  sign or expanded by clicking  sign.

Expanded View:

Each LMS function lists all the screen tabs for that function.

Functionality Tabs can be checked for: **Full** Permissions (add, edit); **Read** Permission (view only); or not selected (functionality not accessible to user and will not show on their dashboard).

## User LMS Home view:

My Role: Training Coordinator

Learning Management System

« LMS Home

Training Management

- > Curriculums
- > Courses
- > Reset Training Data
- > Classroom & Hands-On Scores

Report Management

- > Reports

Login view of user assigned **only** to the defined Role with Permissions to **Training Management** and **Report Management**.

## ASSIGNMENTS

Use **Assignments** to assign Users and Groups to Roles and to remove Users and Groups from Roles.

General Permissions **Assignments**

Role Name Training Administrator

Assignment By Location

**Available** **To Assign**

Search Search Go

Atlanta GA  
Boston MA  
Chennai IN  
Chicago IL  
Hong Kong  
London UK

Dallas TX

Assigned

Search Search Go

-- None --

To Unassign

-- None --

Reset Save

Select name(s) or group(s) from the **Available** list and use the arrow keys to move to the **To Assign** box. Click the **Save** button to move to the **Assigned** box.

## Supervisor Transfer



**Supervisor Transfer** enables system administrators (with permission) to change or transfer bulk users from one supervisor to another supervisor.

The **Supervisor Name** for a specific user can be updated (either manually or electronically) on that user's **User-General** information page under **User Management** where indicated in the screen shot below:

Supervisor Name

However, in circumstances where the Supervisor Name will be changing for multiple users, that task can be handled quickly under the **Supervisor Transfer** link:

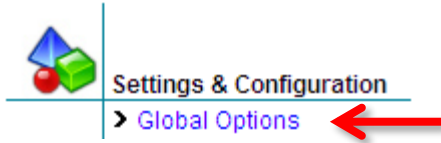
The screenshot shows the 'Supervisor Transfer' interface. It includes a 'Supervisor Name' dropdown set to 'Carter Sam (scarter)', a 'Transfer to Target Supervisor Name' dropdown set to 'Smith Jane (jsmith)', and a 'Filter Users' section with a 'No Filter' option and a 'Click to Show Records' button. Below the filter is an 'Available' list of users and a 'To Assign' list. A 'Save' button is at the bottom. Callouts provide instructions: 'Select the current supervisor from the Supervisor Name dropdown list.', 'Select the new supervisor from the Transfer to Target Supervisor Name dropdown list.', 'All users assigned to the current supervisor will appear in the Available list. Filter options are available from the Filter Users box above to shorten the select list.', and 'Use the arrow keys to move users from the Available box to the To Assign box. Click the Save button to transfer the users to their new supervisor.'



### NOTE:

Only users designated as Supervisors on their profile page will appear on the **Supervisor Name** and **Transfer to Target Supervisor Name** dropdown lists.

# Global Options



**Global Options** are available to enable customization of the entire system. The Global Options link contains settings for various LMS features that can be modified according to organizational requirements.

## INFORMATION/LOGIN SETTINGS/COMPANY GRAPHICS

### Global Options Information

Language	English
Date Format	mm dd yyyy
Time Format	12-hour
Time Zone	(GMT-04:00) Eastern time (USA & Canada)
Show Additional Information	<input checked="" type="radio"/> Yes <input type="radio"/> No

The **Language** option pertains only to the LMS user interface, not to the language of the Interactive Courses.

### Login Settings

Logout Time	90 (Minutes) *
Passwords Enabled	<input checked="" type="radio"/> Yes <input type="radio"/> No
Force Password Change On First Login	<input type="radio"/> Yes <input checked="" type="radio"/> No
Unsuccessful Login Attempts Allowed	0 *
Password Minimum Length	0 *
Password Expires Every	0 (Days) *
Password Complexity	NONE
Message Above Login Area	Welcome to the DuPont eLearning Suite!
Message Below Login Area	If you have any questions, please contact

Set to **Yes** to force ALL users to change their password upon first login.

Company-specific **Messages** can be added above and below the Login area.  
1,024 character limit for 'Above' box;  
10,000 character limit for 'Below' box.

### Company Graphics

Select Login Graphic	<input type="text"/>	<a href="#">Edit...</a>
Select Application Logo	<input type="text"/>	<a href="#">Edit...</a> (200 X 64)

**Company Graphics:** Logo or other images can be uploaded by clicking the [Edit...](#) link (file types: jpg or png)

You can disable any or all of these options so the Employee User won't see these items on their **Learning Tab** page.

☐ **Course List Page**

Learning Tab Default View	<input checked="" type="radio"/> Course View	<input type="radio"/> Curriculum View
Status	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Course Feedback	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Show Course Type	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Show Category	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Expand the Tree View in Learning Tab	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Course Due / Renewal Date	<input type="radio"/> Yes	<input checked="" type="radio"/> No

Courses will list on Employee User **Learning Tab** either by Course View or Curriculum View. Default is **Course** view, unless changed here.

☐ **Skins**

Default CustomEase Skin	Aqua
Default Authoring Tool Skin	Aqua
Course Skin	Aqua

User's view of courses on their **Learning Tab** can be collapsed to initially show assigned Curriculums or Expanded to show all their assigned courses.

**EDIT GROUP TYPE NAMES**

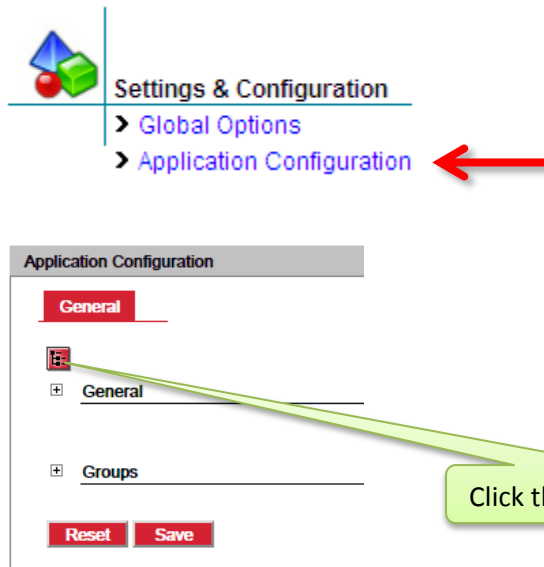
☐ **Edit Group Type Names**

[Edit Group Type Names](#)

Click here to open the window below to **Edit Group Type Names**. Select the item you want to edit, then click the **Edit** button. Make your change in the **Custom** window, then click **Done**.

Click both **Done** and **Save** buttons to save your changes.

## Application Configuration



**Application Configuration** is the location for the following functions:

- **General** - change the **Company Name** as it appears in the upper right hand corner of the LMS screen.
- **Groups** - Enable or disable any or all of the available 12 **Group Types**.

### GROUPS – ACTIVATION/DE-ACTIVATION

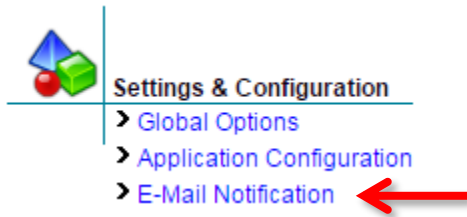
System Admins with permissions can enable or disable any of the available 12 group types by selecting the Yes or No radio button. By default, the first 5 types are pre-labeled: Region (Group 1), Group (Group 2), Division (Group 3), Department (Group 4) and Title (Group 5) and are enabled.

Groups	
Region (Group 1)	<input checked="" type="radio"/> Yes <input type="radio"/> No
Group (Group 2)	<input checked="" type="radio"/> Yes <input type="radio"/> No
Division (Group 3)	<input checked="" type="radio"/> Yes <input type="radio"/> No
Department (Group 4)	<input checked="" type="radio"/> Yes <input type="radio"/> No
Title (Group 5)	<input checked="" type="radio"/> Yes <input type="radio"/> No
Group 6	<input checked="" type="radio"/> Yes <input type="radio"/> No
Group 7	<input checked="" type="radio"/> Yes <input type="radio"/> No
Group 8	<input type="radio"/> Yes <input checked="" type="radio"/> No
Group 9	<input type="radio"/> Yes <input checked="" type="radio"/> No
Group 10	<input type="radio"/> Yes <input checked="" type="radio"/> No
Group 11	<input type="radio"/> Yes <input checked="" type="radio"/> No
Group 12	<input type="radio"/> Yes <input checked="" type="radio"/> No

Each of the Group Types can be enabled by clicking the **Yes** radio button, or disabled by clicking the **No** radio button.

Group Types are renamed in **Global Options** under **Edit Group Type Names**.

## E-Mail Notification



**E-Mail Notifications** are available to provide instant, auto-generated, or scheduled e-mail communications to system users.

E-Mails will be sent both to the **Email ID** designated in the user's profile, as well as to the LMS **Inbox** (for individuals without e-mail addresses). Generic e-mail templates are created by system administrators which will be sent to users based upon automated system triggers or specific scheduled times.

System Admins can **Add** and **Edit** E-Mail Notification Templates. The E-Mail Notifications list can be filtered by E-Mail Notification Template Type. E-Mails can also be sorted by Mail Option Name or Creation Date, as well as Search by specific name.

The screenshot shows the 'E-Mail Notification' management interface. It includes a header 'E-Mail Notification' and a list of notification templates. The list is filtered by 'All' and sorted by 'Mail Option Name'. The templates listed are: 'Course - Remind User to Recertify', 'Course - User Failed to Recertify', 'Curriculum - User Successfully Completed', 'User - New User Welcome', and 'User - Reminder of Forgotten Password'. There are 'Add' and 'Edit' buttons at the bottom left. A callout box on the right provides filtering instructions.

Additional Filters: All

Filter By: -- None --

Sort By: Mail Option Name

Search: [Search Icon]

Course - Remind User to Recertify  
Course - User Failed to Recertify  
Curriculum - User Successfully Completed  
User - New User Welcome  
User - Reminder of Forgotten Password

Add Edit

Filter by **Active**, **Inactive**, **All**, or by E-Mail Notification Template **Type**.

*Note: The default filter is **Active**, so be sure to change to **All** to for all e-mail notification templates created to display – active and inactive.*



A helpful tip: There are 2 *crucial steps* involved in activating notifications:

**1-CREATE** - A generic template is created for each E-Mail Notification type.

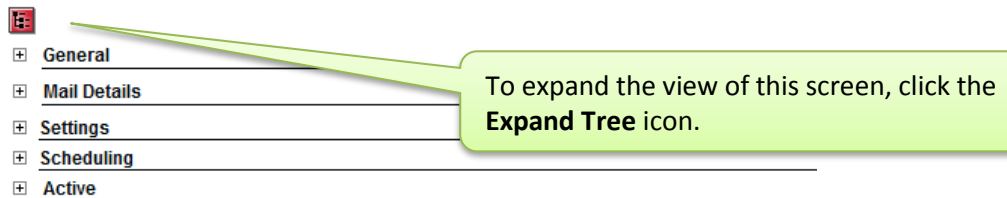
**2-ACTIVATE** – Check the active box to activate the template.

Both steps need to be completed before the e-mails will be automatically generated. Also the template needs to be created and activated *prior to* the action that triggers the e-mail.



## ADDING E-MAIL NOTIFICATIONS

Roles with full access permission to **E-Mail Notifications** can add notifications. To add a notification, click the **Add** button.



After expanding the view of the screen, the E-Mail Notification template page opens where the notification details can be added under **General**, **Mail Details**, **Settings**, **Scheduling** and **Active**.

The screenshot displays the E-Mail Notification template page. It is divided into sections: 'General', 'Mail Details', and 'Body'.  
- **General**: 'Mail Option Name\*' (Expiring Certification Reminder), 'Mail Type' (Course - Remind User to Recertify), 'Mails to Duplicate' (-- None --).  
- **Mail Details**: 'Mail Reply To \*' (kathy.wegner@training.dupont.com), 'Mail CC' (empty), 'Copy Supervisor' (checked), 'Subject' (ACTION Required: Expiring Course Ce...), 'Body' (empty).  
- **Body**: A rich text editor with a toolbar (Font Family, Font Sizes, Keyword, Document..., B, I, U, alignment, list, link, unlink) and a text area containing: 'FIRST NAME LAST NAME, This email is to notify you that your online course: COURSE NAME is due to expire on COURSE RENEWAL DATE. Please log in to: URL to re-take this course prior to the expiration date.'  
Callouts:  
- A green callout box points to the 'Mail Type' dropdown: 'First, select the notification type from the **Mail Type** drop down box. Then, fill in the box above it - **Mail Option Name**.'  
- A green callout box points to the 'Mails to Duplicate' dropdown: '**Duplicate** and edit existing E-Mail templates to save time.'  
- A green callout box points to the 'Mail CC' field: '**Caution!** The recipient **Mail CC:** on this e-mail will receive a copy of **EVERY** individual e-mail that goes out.'  
- A green callout box points to the 'Keyword' dropdown in the toolbar: 'Select **Keywords** to create the body of your e-mail message.'

**Filters** can be defined as needed.

Use **Scheduling** to set up the frequency by which you want the email(s) to go out.

The **Mail to be Sent Time** is based on the recipient's time zone.

After the template is created, the **Active** box needs to be checked to activate it. (Otherwise it remains in-active). To deactivate and stop emails from firing, uncheck the **Active** box.

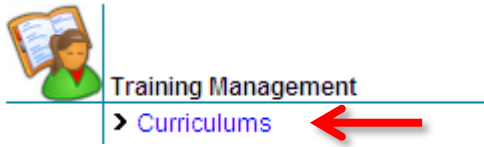
**LIST OF AVAILABLE E-MAIL NOTIFICATIONS:**

E-Mail Notification and Description	E-Mail Notification Trigger
<p><b>User - New User Welcome</b> This e-mail is sent to a user when they have been added to the LMS database.</p>	<p>This e-mail is triggered by clicking the <b>Save</b> button after adding a new user or when a User Import is done. (Note: E-mail notification must be activated <u>prior</u> to the import or manual save).</p>
<p><b>User - User Made Active</b> This e-mail is sent to inform a user that they have been activated in the LMS.</p>	<p>This e-mail is triggered by a system administrator changing a User Status (on User-General Information page) from <b>Inactive</b> to <b>Active</b>.</p>
<p><b>User - Reminder of Forgotten Password</b> This e-mail is sent to users who request a password reminder.</p>	<p>This e-mail will be generated immediately upon request from the <b>Forgot Password</b> link on the User's Login Page, after user submits their e-mail address.</p>
<p><b>User – Instant Email to Users</b> This is an ad hoc e-mail that can be generated for any reason</p>	<p>There is no system trigger. This notification can be scheduled to go out at a designated time, or according to a designated schedule.</p>
<p><b>User – Instant Email to a Group</b> This is an ad hoc e-mail that can be generated for any reason.</p>	<p>There is no system trigger. This notification can be scheduled to go out at a designated time, or according to a designated schedule.</p>
<i>Continued on next page...</i>	

<p><b>Course - Individual Training Summary</b> This is an ad hoc e-mail that can be generated to notify users of their course statuses. Users are qualified to receive this notification based on the <b>Course Status</b> at the moment the e-mail is generated. It will continue to fire until the user no longer qualifies or total number of e-mails to be sent is reached.</p>	<p>The system trigger is based upon the <b>Keywords</b> used in the body of the e-mail notification. It will only fire to users who qualify based on the keyword trigger used. There are 6 possible keyword triggers, starting with “<b>List Courses that...</b>”: <b>User has Not Started, User has Not Started Past Course Start Date, User has Not Completed, User has Not Completed Past Completion Date, User has Mastered/Completed, Have Expired for the User.</b></p>
<p><b>Course - Instant Email to Users Assigned</b> This is an ad hoc e-mail that administrators can send out at to all users assigned to the Course.</p>	<p>There is no system trigger tied to this e-mail. This e-mail can be sent out immediately at will upon clicking the <b>Save and Send Notification</b> button.</p>
<p><b>Course - User Was Assigned</b> This e-mail is sent to the user when they are assigned to the selected course.</p>	<p>Moving the user from <b>Available</b> to <b>Assigned</b> on the Course <b>Assignments</b> tab. *note: e-mail template needs to be created &amp; activated <i>before</i> assigning users</p>
<p><b>Course - User Was Unassigned</b> This e-mail is sent to a user when they are removed from a course.</p>	<p>Moving a user from <b>Assigned</b> to <b>To Unassign</b> on the Course <b>Assignments</b> tab.</p>
<p><b>Course - Remind User to Recertify</b> This e-mail is sent to users before their course certification is due to expire.</p>	<p>The notification is sent to users whose course status is <b>Mastered</b> and is triggered by the user’s course <b>Renewal Date</b>.</p>
<p><b>Course - User Failed to Recertify</b> This e-mail is sent to inform user that their course has expired because they failed to retake it by the renewal date.</p>	<p>When the user fails to renew the course before the <b>Renewal Date</b>; this e-mail is triggered when course status changes from Mastered to <b>Expired</b>.</p>
<p><b>Course - User Failed to Achieve Passing Score</b> This e-mail is sent to notify users that they have not Mastered the course.</p>	<p>The notification is triggered by the <b>Post-Test Passing Score</b> set in the <b>Course Options Template</b>.</p>
<p><b>Course - User’s Certification Status was Reset</b> This e-mail is sent to users when their course certification data is reset.</p>	<p>Resetting training data (Certification Status or Hands-On Complete) for users using the <b>Reset Training Data</b> application link will immediately trigger e-mails.</p>
<p><b>Curriculum - Instant Email to Users Assigned</b> This is an ad hoc e-mail that administrators can send out at to all users assigned to the Curriculum.</p>	<p>This e-mail can be sent out immediately, at will, upon clicking the <b>Save and Send Notification</b> button. No system trigger.</p>
	<p><i>Continued on next page...</i></p>

<p><b>Curriculum - User Was Assigned</b> This e-mail is sent to the user when they have been added to a curriculum.</p>	<p><b>Assignment</b> of a User to a Curriculum on the Curriculum <b>Assignments</b> tab. *note: e-mail template needs to be created &amp; activated <i>before</i> assigning users</p>
<p><b>Curriculum - User Was Unassigned</b> This e-mail is sent to a user when they are removed from a curriculum they were assigned to.</p>	<p>Moving a User from <b>Assigned</b> to <b>To Unassign</b> to the Curriculum <b>Assignments</b> tab.</p>
<p><b>Curriculum - Course Was Added</b> This e-mail is sent to users assigned to this curriculum when a course is added to it.</p>	<p>Moving course(s) from <b>Available Courses</b> to <b>Assigned Courses</b> on the Curriculum <b>Courses</b> tab.</p>
<p><b>Curriculum - Course Was Removed</b> This e-mail is sent to users assigned to a curriculum when a course is removed from the curriculum.</p>	<p>Moving course(s) from <b>Assigned Courses</b> to <b>To Unassign</b> on the Curriculum <b>Courses</b> tab.</p>
<p><b>Curriculum - User Successfully Completed</b> This e-mail is sent to users upon completion of a Curriculum.</p>	<p>This e-mail will be generated immediately upon completion of all the <b>Required</b> courses in the Curriculum.</p>

# Curriculums



**Curriculums** is the tool to help meet the training requirements of a specific group – by assigning users or groups of users to single or multiple courses at once. Users may be assigned to more than one **Curriculum** at a time.

## ADDING/CREATING CURRICULUMS

Users that have been assigned roles with full access permission to **Curriculums** are able to Add and Edit 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

## ADDING COURSES TO A CURRICULUM

Courses can be added from another Curriculum by selecting the Curriculum from the drop down list.

Select courses from the list of **Available Courses** to be **Assigned** to this curriculum by highlighting the course(s) and using the > buttons. Clicking the **Save** button will move the course(s) to the **Assigned Courses** box.

## ARRANGE COURSES IN A CURRICULUM

Once courses have been added to the Curriculum, administrators may list the courses in a specific order, arrange courses as **Required** or **Optional**, define the **Completion Criteria**, and/or enable **Sequential Access** to courses, if required.

How Curriculum **Completion Criteria** will show on the User's Learning **Due** tab:

## COURSE OPTIONS TEMPLATE

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.**

Course ID	Course Name	Course Options Template
<input type="checkbox"/> BAK4EFV	Back Safety: Lift Well , Live Well	<a href="#">Default Course Option Template</a>
<input checked="" type="checkbox"/> BLDPEFV	Bloodborne Pathogens	<a href="#">Default Course Option Template</a>
<input type="checkbox"/> FRSSEFV	Fire Safety	<a href="#">Default Course Option Template</a>

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

**3. Click Save.**

**4. Confirm changes to the Course Options will be applied to All Users or Future Users Only. Future Users Only will grandfather completion results where All Users options will not.**

**Confirm**

Apply the changed Options to

All Users  
 All Users Including Exceptional Assignments  
 Future Users Only

**Ok**

## MODULES – MODIFYING THE MENU STRUCTURE OF COURSES

System administrators can de-select **modules** (training topics) 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.**

**Reset Save**

## ASSIGNMENTS

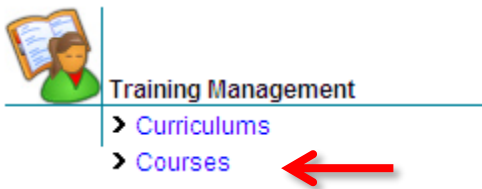
Users may be assigned to Curriculums by selecting from the Group types, Assignment Combinations or Users in the **Assignment Type** dropdown menu.

The screenshot shows the 'Assignments' tab in a software interface. The 'Curriculum Name' is 'Safety Regulatory Training'. The 'Assignment Type' dropdown is open, showing options like Department, Region, Division, Job Title, Location, Assignment Combinations, and Users. The 'Available' list contains Distribution, Finance, IT, Manufacturing, Purchasing, and QA. The 'Assigned' list contains Administration and Human Resources. Red arrows point from the 'Available' list to the 'Assigned' list, and a green callout box explains the process.

Select the relevant group name(s) from the **Available** list and use the arrow keys to move it to the **Assigned** box. Clicking the **Save** button will move the group/users to the **Assigned** box.



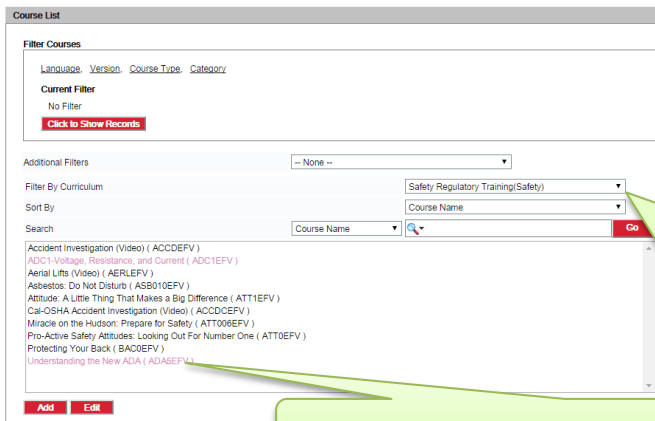
# Courses



User roles assigned full access permission can Add and Edit **Courses**. The types of course that may be added include: **Classroom, Custom, Video, Place Holder** and **Other**.

## EDIT COURSES

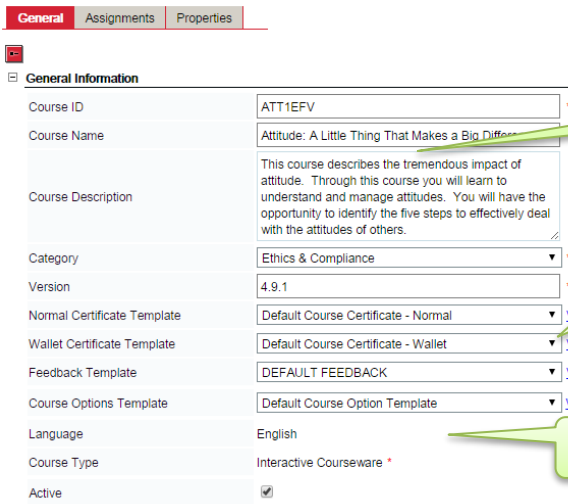
System Admins (with permission) can **Add** and **Edit**, Courses from the Course List. From the Course List, be sure to **Filter by Curriculum** first to ensure that the desired version of a course is the one edited.



If the course has already been added to a Curriculum, be sure to **Filter by Curriculum first** to ensure the correct version of the course is edited. This will refresh the course list. Otherwise, only the default version of the course will be edited and those edits will not be reflected in the course assigned to a Curriculum (or Curriculums).

Inactive courses will appear in a different color.

To edit a course, highlight the course name and selected the **Edit** button.



Course ID (up to 64 characters & allows hyphens), Name and Description can be changed.

Certificate, Feedback, and Course Option Templates can be assigned to the course by selecting the appropriate template from the dropdown list.

Language and Course Type may not be changed.

## ASSIGNMENTS

Under the Course **Assignments** Tab, Individual Users can be assigned to, or unassigned from, the **Course**.

Note: The **Assignments** tab will be disabled if the course was filtered by a Curriculum.

Assigned courses can be designated as **Required** or **Optional** (select from dropdown).

*Note: Users can be filtered by Group(s), but actual Course Assignments are made by User.*

Move names from the **Available** box on the left to the **To Assign** box on the right using the arrow keys in the center. Then click **Save** to move names to the **Assigned** box.

## PROPERTIES

Course properties can be set from the **Properties** tab.

**Course Policy & Course Outline** can be uploaded here.

## Course Options Template



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

Course Option Template Name	Annual Refresher
Description	These courses are due to be completed every 12 months.
Set as Default	<input type="checkbox"/>

**Character Limit: 128**  
characters

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

System Admins with full permissions can Add and Edit Course Option Templates in the LMS. They can change the default settings for Interactive Courses via the **Course Option Template** assigned to the Course.

The **Course Options Template** page opens with the Course Options collapsed. To expand the entire page, click the Expand Tree icon. Or click the plus sign + next to each item to expand the content of that section.

Course Options Template

Course Options Template Name	12 Month Renewal (Default)
Description	
Set as Default	<input checked="" type="checkbox"/>

Course Options will be updated only for values which have the check boxes selected.

- Course Options
- Course Completion Options
- Testing Options
- Mastery Options
- User Functionality Options
- Redirection Options

Reset Save Reset To Default Course Options Settings

## COURSE OPTIONS

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 Options

Course Active   Yes  No Setting the Course Active option as "No" will remove all courses associated to this course option template in the Learning Tab

Check box to activate & edit options next to the checkbox

### Course Completion Options

#### Course Completion Options

Certification Period	<input type="checkbox"/>	<input checked="" type="radio"/> Expires After <input type="text" value="12"/> (Months) * <input type="radio"/> Expires On <input type="text"/> ( mm/dd/yyyy ) <input type="radio"/> Expires Every Year on <input type="text" value="mm"/> <input type="text" value="dd"/> (mm/dd)
Certification Grace Period	<input type="checkbox"/>	<input checked="" type="radio"/> Expires After <input type="text" value="0"/> (Months) * <input type="radio"/> By Calendar Year End (not to exceed 12/31/YYYY of the renewal year)
Move From Completed to Due	<input type="checkbox"/>	<input checked="" type="radio"/> Move To Due <input type="text" value="1"/> Month(s) Prior to Renewal Date * <input type="radio"/> Moves To Due On <input type="text"/> ( mm/dd/yyyy )

**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.

## Course Completion Options - Continued

Course Available Date	<input checked="" type="checkbox"/> After <input type="text" value="0"/> Days ( from when it was assigned ) * <input type="radio"/> By <input type="text"/> ( mm/dd/yyyy ) <input type="radio"/> By <input type="text" value="mm"/> / <input type="text" value="dd"/> (mm/dd) <input type="checkbox"/> Hide Course from User until Availability Date <span style="color: red;">Change applies to all users</span>
User Should Start Course	<input checked="" type="checkbox"/> Within <input type="text" value="0"/> Days ( from when it was assigned ) * <input type="radio"/> By <input type="text"/> ( mm/dd/yyyy )
User Should End Course	<input checked="" type="checkbox"/> Within <input type="text" value="0"/> Days ( from when it was assigned ) * <input type="radio"/> By <input type="text"/> ( mm/dd/yyyy ) <input type="radio"/> By <input type="text" value="mm"/> / <input type="text" value="dd"/> (mm/dd) <input type="checkbox"/> Deactivate Course Link after End Date

**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 & edit options next to the checkbox

<input type="checkbox"/> Testing Options	
Pre-Test Enabled	<input checked="" type="checkbox"/> <input checked="" type="radio"/> Yes <input type="radio"/> No
Pre-Test Passing Score	<input checked="" type="checkbox"/> <input type="text" value="80"/> (1 to 100)% *
Pre-Test Credit Enabled	<input checked="" type="checkbox"/> <input type="radio"/> Yes <input checked="" type="radio"/> No
Disable Pre-Test After "N" Consecutive Failed Attempts	<input checked="" type="checkbox"/> <input type="text" value="0"/> * <small>Note: The pre-test is considered attempted as soon as the user has answered at least one question.</small>
Post-Test Enabled	<input checked="" type="checkbox"/> <input checked="" type="radio"/> Yes <input type="radio"/> No
Post-Test Passing Score	<input checked="" type="checkbox"/> <input type="text" value="80"/> (1 to 100)% *
Retake Missed Questions in Post-Test	<input checked="" type="checkbox"/> <input type="radio"/> Yes <input checked="" type="radio"/> No
Self-Check Passing Score	<input checked="" type="checkbox"/> <input type="text" value="80"/> (1 to 100)% *
Disable Post-Test After "N" Consecutive Failed Attempts	<input checked="" type="checkbox"/> <input type="text" value="3"/> *
Interval Between Failed Post-Test Attempts	<input checked="" type="checkbox"/> After <input type="text" value="0"/> (Days) *
Proctor Post-Test	<input checked="" type="checkbox"/> <input type="radio"/> Yes <input checked="" type="radio"/> No
E-Signature required at the end of Post-Test	<input checked="" type="checkbox"/> <input type="radio"/> Yes <input checked="" type="radio"/> No

*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 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 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.)

**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 between re-take attempts 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. (\***Audit 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

**Mastery Options**

Grant Mastery When User Passes All Self-Checks	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Change applies to future users only
Grant Mastery When User Completes All Modules (No Test)	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Change applies to future users only
Additional Hands-On Requirement	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	

*Note: A red arrow points to the 'Yes' radio button for 'Grant Mastery When User Passes All Self-Checks' with the text: 'Check box to activate & edit options next to the checkbox'*

**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 **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

Check box to activate & edit options next to the checkbox

User Functionality Options	
Show Default Skin	<input checked="" type="checkbox"/> Aqua
Show Bit Rate	<input checked="" type="checkbox"/> <input type="radio"/> Yes <input checked="" type="radio"/> No
Bit Rate Default	<input checked="" type="checkbox"/> NONE
Complete All Modules Sequentially	<input checked="" type="checkbox"/> <input type="radio"/> Yes <input checked="" type="radio"/> No
Must Pass All Self-Checks to Unlock Post-Test	<input checked="" type="checkbox"/> <input type="radio"/> Yes <input checked="" type="radio"/> No
Click "Finish" After Each Question	<input checked="" type="checkbox"/> <input type="radio"/> Yes <input checked="" type="radio"/> No
Review Test Enabled	<input checked="" type="checkbox"/> <input type="radio"/> Yes <input checked="" type="radio"/> No
Show Comments	<input checked="" type="checkbox"/> <input type="radio"/> Yes <input checked="" type="radio"/> No
Show Notes	<input checked="" type="checkbox"/> <input type="radio"/> Yes <input checked="" type="radio"/> No
Enable Auto Advance for Storyboards	<input checked="" type="checkbox"/> <input type="radio"/> Yes <input checked="" type="radio"/> No

**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.

Check box to activate & edit options next to the checkbox

## User Functionality Options – Continued

Show Score Screen	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Print Certificate	<input checked="" type="checkbox"/>	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Force Course Feedback	<input checked="" type="checkbox"/>	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Disable Post-Test After User Masters The Course	<input checked="" type="checkbox"/>	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Allow Video Fast-Forwarding	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Course Timer	<input checked="" type="checkbox"/>	<input type="radio"/> Yes	<input checked="" type="radio"/> No

**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

Check box to activate & edit options next to the checkbox

<input type="checkbox"/> Redirection Options	
Redirection URL - Mastered	<input checked="" type="checkbox"/> <input type="text"/>
Redirection URL - Not Mastered	<input checked="" type="checkbox"/> <input type="text"/>
Show Asset Selection	<input checked="" type="checkbox"/> <input type="radio"/> Yes <input checked="" type="radio"/> No

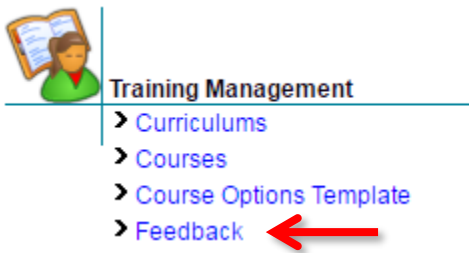
**Redirection URL – Mastered:** When a User masters a course, the user will automatically be redirected to the URL specified in this tab.

**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 Optional or 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.

The screenshot shows the 'Question' tab of the Feedback tool. The 'Name' field contains 'Default Feedback'. The question text is: 'Does this course keep your interest? The information was presented clearly. The course information will help you on your job. The information was thorough but not overwhelming.' To the right of the question are four red buttons labeled 'AA', 'A', 'V', and 'VV'. A green callout box points to the 'Show Comments' checkbox, which is checked. The callout text reads: 'Show Comments is used to allow employee users to write their comments while taking the course or at the end of the course.'

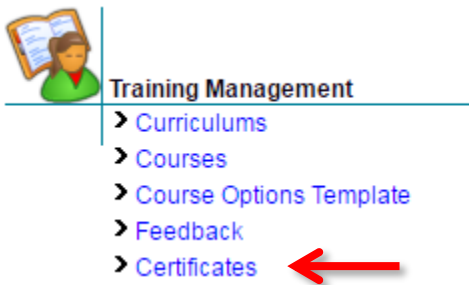
Below is a sample of what the user will see:

The screenshot shows a user feedback form titled 'Feedback - Ethics: The L.O.G.I.C. of Right'. It features a Likert scale with five columns: 'Strongly Agree', 'Agree', 'Neutral', 'Disagree', and 'Strongly Disagree'. The questions and their corresponding radio button selections are:

Question	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
The course was easy to use.	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The course kept your interest.	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The information was presented clearly.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
The course information will help you on your job.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
The information was thorough but not overwhelming.	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The questions were fair.	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Below the scale is a 'Comment(s)' field containing the text 'The course was interesting.' and 'Reset' and 'Save' buttons.

## Certificates



System Admins 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 8 ½ x 11 paper size
- **Default Course Certificate-Wallet:** approximately the size of a business card
- **Default Curriculum Certificate-Normal:** standard 8 ½ x 11 paper size
- **Default Curriculum Certificate-Wallet:** approximately the size of a business card

### ADDING 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.

The screenshot shows the 'Certificate - General' form. The 'General' tab is selected. The 'Certificate Name' field contains 'Default Course Certificate - Normal'. The 'Active' checkbox is checked. The 'Certificate Type' field has radio buttons for 'Course', 'Curriculum', and 'Assessment \*'. The 'Certificate Size' field has radio buttons for 'Normal' and 'Wallet \*'. The 'Page Settings' field has radio buttons for 'Landscape' and 'Portrait'. There are 'Reset' and 'Save' buttons at the bottom.

**Character Limit: 256**  
characters



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 un-assigning them from the Course or Curriculum they are assigned to.

## ADDING CONTENT TO A CERTIFICATE TEMPLATE

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.

The screenshot shows the 'Content' tab of a certificate editor. The main content area displays a 'Certificate of Completion' template with the following text: 'This is to certify that [First Name] [Last Name] has successfully completed [Course Name] on [Last Mastered Date] Taught/Facilitated by: [Instructor Name]'. Below this, it says 'Renewal Date for this course: [Renewal Date]'. At the bottom are 'Preview', 'Reset', and 'Save' buttons. A toolbar at the top includes 'Arial', 'Font Sizes', 'Keyword', 'Images', and text formatting options. A callout box points to the 'Images' dropdown with the text: 'Click **Edit...** to upload an image to the certificate; which will then appear in the "Images" dropdown window.' Another callout points to the 'Images' dropdown with the text: '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.' A third callout points to the template text with the text: 'Keywords can be pulled from the LMS database fields to build your Certificate Templates.' A fourth callout points to the '[Instructor Name]' field with the text: 'Instructor Name field is only available on **Course & Assessment** Certificates, not Curriculum Certificates. Maximum of 3 names can be displayed.'

## 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.

The screenshot shows the 'Assignments' tab. At the top, there are tabs for 'General', 'Content', and 'Assignments'. Below them is a dropdown menu for 'Display Courses from Curriculum' set to 'Regulatory Safety Training(SAFE0101)'. A 'Filter Courses' section includes links for 'Language', 'Version', 'Course Type', and 'Category', and a 'Click to Show Records' button. Below this are two main sections: 'Available' and 'Assigned'. The 'Available' section has a search box and a list box containing '-- None --'. The 'Assigned' section has a search box and a list box containing 'Back Safety: Lift Well, Live Well (BAK4EFV)', 'Bloodborne Pathogens (BLDPEFV)', and 'Fire Safety (FRSSEFV)'. Between the 'Available' and 'Assigned' sections are navigation buttons: '>>', '>', '<', and '<<'. A callout box points to the 'Available' list box with the text: '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



### Training Management

- > Curriculums
- > Courses
- > Course Options Template
- > Feedback
- > Certificates
- > Reset Training Data



System Admins with access 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** first 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 highlight 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 and use the arrow keys to move selected name(s) to the **To Apply** box for user(s) who need their training data reset.

**Reset All** or **Reset** select training data. System administrators indicate the data to be reset by placing a check in the box provided to the left of the item listed in the Reset Training Data dialog box

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.

## Classroom & Hands-On Scores



The **Classroom & Hands-On Scores** feature allows instructors to apply scores for users of Classroom courses. Courses can be found using **Filter by Curriculum**, Sort by Course Name or Course ID, or Search by Course Name or Course ID.

**Classroom & Hands-On Scores** enables system administrators to manually give credit to users for all Courses/**Course Types** that are in the system – Interactive Courseware, Classroom, Place Holder, etc.

The screenshot shows the 'Classroom & Hands-On Scores' interface. It includes a 'Filter Courses' section with links for Language, Version, Course Type, and Category. The current filter is 'No Filter', and there is a 'Click to Show Records' button. Below this is an 'Additional Filters' section with a dropdown menu set to '-- None --'. The 'Filter By Curriculum' dropdown is circled in red and contains 'Safety Regulatory Training(Safety2011)'. The 'Sort By' dropdown is set to 'Course Name'. There is a search bar with 'Course Name' selected and a 'Go' button. A list of courses is displayed, with 'Electrical Safety: Beware the Bite (ELE5EFV)' highlighted. At the bottom, there is a checkbox labeled 'Get user(s) across curriculum' which is checked.

Select **Filter by Curriculum** and *de-select* the checkbox for “**Get user(s) across curriculum**” to reduce results only to those users assigned to the specified Curriculum.

Note: **Get user(s) across curriculum** is checked by default and will select all users across all curriculums containing the course, unless de-selected (un-checked).

Once the course is selected, system administrators may choose the users they need to score. There are two user list boxes displayed, **Users with Training Data** and **Users without Training Data**:

The screenshot shows two user list boxes. The top box is titled "User(s) with training data" and contains one user: "Smith Leslie ( Lsmith )". The bottom box is titled "User(s) without training data" and contains several users: "elangovan meena ( meena0 )", "Franco Rajathi ( Raji )", "Haynes Debbie ( DEBBIEH )", "Haynes-Carter Deb ( DebbieSA )", "Hunt Terry ( twh )", and "Javier Jason Gabriel ( gabex )". Red arrows indicate the flow of users between the boxes. Callouts explain that the top box shows users already scored and the bottom box shows users not scored.

**NOTE:**  
User(s) must be already **Assigned** to the course for their names to appear in the list.

Select the user(s) to score that do not have training data. Choose from the following options:

**Score: Instructors enter a numerical percentage value.**

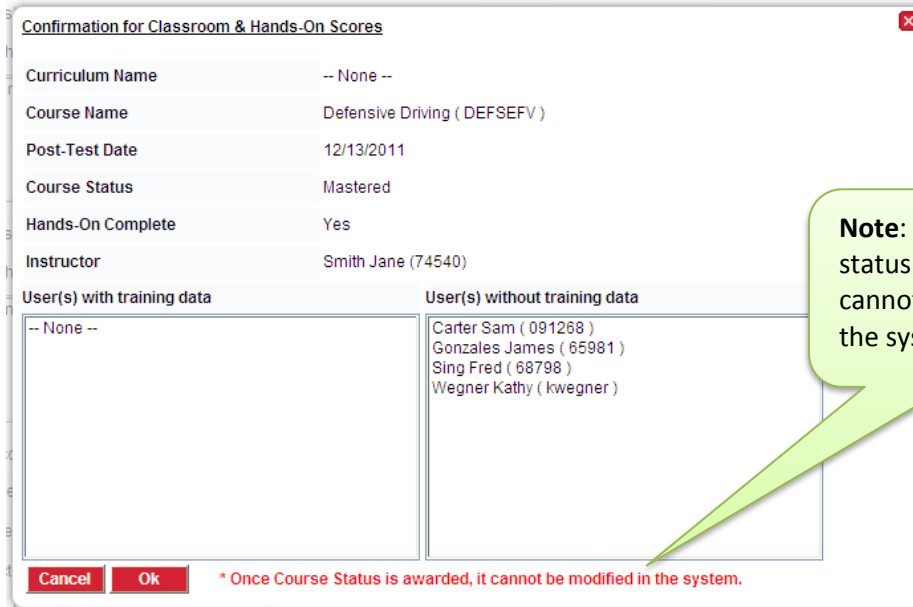
The screenshot shows the "Score" form. The "Score" radio button is selected. Fields include "Post-Test Date" (calendar icon), "Post-Test Score" (1 to 100)%, "Instructor" (dropdown menu), "Hands-On Complete" (checkbox), and "Historical Record" (checkbox). Callouts provide instructions: "Enter Post-Test Date and Post-Test Score (%)", "Select Instructor from dropdown or select checkbox for Other to type in Instructor name.", and "Check the Historical Data box when entering a 'past' score or status. That way, your entry will not change the user's current course score/status and renewal date."

**Course Status: Instructors choose either InProgress or Mastered.**

The screenshot shows the "Course Status" form. The "Course Status" radio button is selected. The "Course Status" dropdown menu is open, showing options: "-- None --", "InProgress", and "Mastered". Callouts provide instructions: "Enter Post-Test Date. Select one Status: InProgress or Mastered." and "Check the Hands-On Complete checkbox before saving."

## Confirmation

A confirmation box (shown below) will appear when you click the **Save** button. This is to ensure that the system administrator awards the correct score/status to correct persons. To award the score click the **OK** button. Click the **Cancel** button to make desired changes.



The image shows a confirmation dialog box titled "Confirmation for Classroom & Hands-On Scores". It contains the following information:

Curriculum Name	-- None --
Course Name	Defensive Driving ( DEFSEFV )
Post-Test Date	12/13/2011
Course Status	Mastered
Hands-On Complete	Yes
Instructor	Smith Jane (74540)

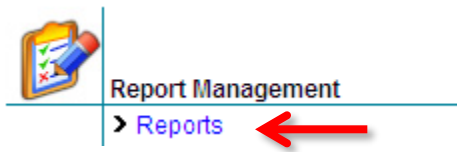
Below this information are two list boxes:

- User(s) with training data:** -- None --
- User(s) without training data:** Carter Sam ( 091268 ), Gonzales James ( 65981 ), Sing Fred ( 68798 ), Wegner Kathy ( kwegner )

At the bottom of the dialog box are two buttons: **Cancel** and **Ok**. A red asterisk note at the bottom reads: **\* Once Course Status is awarded, it cannot be modified in the system.**

**Note:** Once course status is awarded, it cannot be modified in the system.

## Reports



**Report Management** enables users with full access permissions to Add, Edit, 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.

A screenshot of the 'Report Listing' page. It features filter options for Report Type (All), Report Category (LMS Reports), and Sort By (Report Name). A search bar is present. A list of reports is shown, with 'User Planned Vs Completed Report' highlighted in blue. A 'Run Report' button is at the bottom right. A callout box points to the blue highlight with the text: 'Reports appearing in blue are non-editable.' Another callout box points to the 'Run Report' button with the text: 'Highlight the Report you want to run from the list and click the Run Report Button.'

### 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.

A screenshot of the 'Report Selection Criteria' page for the 'User Planned Vs Completed Report'. It shows a list of filter links: User Active, User Name, Course Assigned Date, Course Type, Required or Optional, Course Status, Course Name, Course Active, Role Name, Curriculum Name, Region, Business Unit, Division, Department, Job Title, Code, Location, Shift, Cost Center, EEO Category, Supervisor Name. A 'Current Filter' table shows 'User Active' as 'Yes', 'Required or Optional' as 'Required', and 'Course Active' as 'Yes'. A callout box points to the filter links with the text: 'Select from any of the available filter links, one at a time, to set your filters.' At the bottom, there are buttons for 'Reset', 'Process Report', and 'Save Criteria'.



## USING THE REPORT FILTERS

Below is an example of **Filter** selection, using the **Group** field **Department**. 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.

Department

Available

Search  Go

Administration  
Distribution  
Finance  
Human Resources  
IT  
Purchasing  
QA  
Sales

>>  
>  
<  
<<

Selected

Search  Go

Maintenance  
Manufacturing

Reset Done

Use the > buttons to move selections from the **Available** box to the **Selected** box. 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.

Filter Report Criteria

[User Active](#), [User Name](#), [Course Assigned Date](#), [Course Type](#), [Required or Optional](#), [Course Status](#), [Course Name](#), [Course Active](#), [Role Name](#), [Curriculum Name](#), [Region](#), [Business Unit](#), [Division](#), [Department](#), [Job Title](#), [Code](#), [Location](#), [Shift](#), [Cost Center](#), [EEO Category](#), [Supervisor Name](#)

Current Filter [Click Here to Reset Filter Settings](#)

User Active	Yes
Required or Optional	Required
Course Status	Started,Not Started,InProgress
Course Active	Yes
Region	US - Northeast
Department	Maintenance,Manufacturing
Location	Boston MA

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.

Process this Report for Unformatted Data Only

Reset Process Report Save Criteria

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.

**User Planned Vs Completed Report**

User ID	Last Name	First Name	Curriculum Name
scafter	Carter	Sam	General Training for All Employees
Region	Business Unit	Division	Department
US - Northeast	APU	Manufacturing	Distribution

Course Name	Last Test Taken Date	Course Assigned Date	Score	Course Status
Arc Flash: Live to Tell!		01/11/2012		Not Started
Defensive Driving	12/13/2011	01/10/2012		Expired

User ID	Last Name	First Name	Curriculum Name
scooper	Cooper	Sheldon	General Training for All Employees
Region	Business Unit	Division	Department
US - Northeast			

Course Name	Last Test Taken Date	Course Assigned Date	Score	Course Status	Total Training Time (HH:MM)	Renewal Date
Arc Flash: Live to Tell!	07/16/2014	01/11/2012	87	Mastered		07/16/2015
Defensive Driving		01/10/2012		Not Started		

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

## LIST OF AVAILABLE LMS REPORTS:

**Course Details:** Provides a comprehensive list of all course details.

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

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

**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:** This report displays the list of the Pre-Test, Self-Check and Post-Test scores of the users.



**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.

**Training Matrix Report:** This report displays the groups/assignment combinations that are associated with a curriculum and other curriculum details such as the courses that are assigned to the curriculum, the course id, the required/optional status of the courses and the certification period.

**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 Curriculum Completed Certificates:** Certificates of users who have mastered all the required courses of a curriculum are stored electronically and can be printed (8.5x11 size). Can filter by User Active, User Name, Certificate Name, Role Name, Curriculum Name, any of the Groups. This report cannot be edited.

**User Details:** This report lists the general details of users, including: Name, Email address, Group Information, Role Information, Preferred Display Settings, and any additional information.

**User Planned Vs Completed:** Displays data for all courses assigned to a user. Score, Test Date Taken, Course Status and Total Training Time will be displayed by Course Name. Can filter by Active, User Name, Curriculum Name, Course Status, Course Start Date, any of the Groups, Course Name, Course Type, Role Name, Supervisor Name.

**User Training Status:** 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 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.

## CREATING A NEW/CUSTOM REPORT

If the desired information is not found in one of the standard LMS reports, system administrators with full access permissions can create new reports or edit existing reports.

**Custom Reports** may be created from scratch OR by editing an existing report. If one of the existing reports is similar to a report you want to produce, you have the option to add/remove data from that report.

Click the **Add** button to create a new report from a blank template.

The screenshot shows a 'Report Listing' window with the following elements:

- Filter By Report Type
- Filter By Report Category
- Sort By
- Search
- A list of reports including: My Test Scores - Enhanced, My Training Status, Storyboards Customize, Test Scores - Enhanced, Training Matrix Report, User Certified Certificates, User Curriculum Completed Certificates, User Curriculum Completed, User Details, User Planned Vs Completed Re, User Training Status Sum, and User Training Status.
- 'Add' and 'Edit' buttons at the bottom.

Click the **Edit** button to create a custom report from an existing one.

The screenshot shows the 'Report - Design' interface with the following elements:

- Tabs: General, **Design** (highlighted with a red dashed box), Selection Criteria, Properties.
- Section: Report - Design
- Group By Fields: New Line, Edit, Delete
- Detail Fields: New Line, Edit, Delete
- Buttons: Reset, Save, Save As, Design Preview, Report Preview

To create/modify the design of the report, click the **Design** tab.

To add fields to either the Group or Detail sections, click the appropriate **Edit** link.

The **Design** tab will define how the data will be organized on the report by defining how data records will be *grouped* and what *details* will be displayed.

--Select View--  
USERS  
**CURRICULUM**  
COURSES  
PERMISSION: CURRICULUM  
GROUPS  
STORYBOARDS  
CLASSROOM  
COURSE OPTIONS TEMPLATE  
USER MODULE INFO  
CERTIFICATES  
TRAINING INFO  
TEST SCORE  
EVENTS  
HISTORICAL TRAININGINFO

--Select View--  
Available Fields  
Search  
Selected Fields  
Search  
Reset Done

To choose which fields you want on your report, first click **Select View** to choose the category of the desired data.

CURRICULUM  
Available Fields  
Search  
Active  
Course Assign Status  
Course Last Updated By  
Course Last Updated Date  
Created By  
Description  
User Assign Status  
User Last Updated By  
User Last Updated Date  
Selected Fields  
Search  
Curriculum ID  
Curriculum Name  
Reset Done

Click the **Done** button.

Once you've selected the category, you will see a list of the data fields in that category. Move the desired fields from the **Available Fields** section to the **Selected Fields** section.

Report - Design  
Group By Fields  
New Line Edit Delete  
Curriculum ID Curriculum Name  
Detail Fields  
New Line Edit Delete  
Reset Save Save As Design Preview Report Preview

The selected fields will be added to the section you chose.

The **Selection Criteria** tab allows the designer to select which field(s) can be used to filter report data.

Report - Selection Criteria

[Click here](#) to add Selection Criteria

Curriculum Name

Course Name

Course Active Yes

User ID

Reset Save Save As Design Preview Report Preview

These boxes indicate which fields will be available to be used as filters when a user runs the report.

Default filter values can also be set by clicking one of these boxes. This example indicates that only Active courses will be included in the report.

Any criteria that you want to be used *every* time the report is run may be selected by clicking the appropriate criteria field and the selecting the value from the list of options.

The last tab in the create/modify report process is the **Properties** tab.

Report - Properties

Report Title Curriculum Course Assignments

Page Settings  Portrait  Landscape

Run Report for Logged In User

Group Fields Width

Curriculum Name 5.23 cm

Detail Fields Width

Course Name 9.24 cm

Course Assign Status 4.75 cm

Course Last Updated Date 5.28 cm

Course Last Updated By 5.28 cm

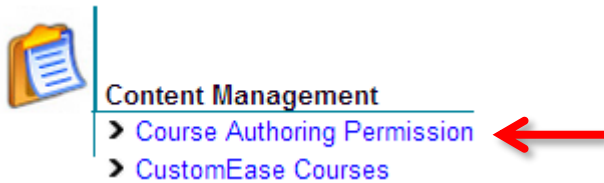
Reset Save Save As Design Preview Report Preview

There will be a Field Width box for every field that was added to the report. The width is measured in centimeters (cm).

Use this tab to define:

- Whether the report will print Portrait or Landscape.
- What format the report will print in by default. The choices are Crystal Reports, Microsoft Excel, Microsoft Word or Adobe PDF.
- The width of each data field displayed on the report (measured in centimeters (cm)).

## Course Authoring Permission



**Course Authoring Permission** is used to give administrative users the right to access and customize Interactive Courses. They will only have access to courses which they have been assigned.

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.

**Course List**

Filter Courses  
Language, Version, Course Type, Category  
Current Filter  
No Filter  
[Click to Show Records](#)

Filter By Curriculum: -- None --  
Courses From: Clarity  
Sort By: Course Name  
Search By: Course Name  [Go](#)

Accident Investigation (Video)(ACCDEFV)  
Arc Flash: Live to Tell!(ELE016EFV)  
Business Ethics and the FCPA(POI002EFV)  
CLX1-ControlLogix: Introduction to the ControlLogix PLC Family(C LX1EF)  
CLX2-ControlLogix: Introduction to RSLogix 5000 Software(C LX2EF)  
CLX3-ControlLogix: Creating and Using Tags and the Program Editor(C LX3EF)  
CLX4-ControlLogix: Basic Instructions(C LX4EF)  
CLX5-ControlLogix: Advanced Programming and Analog Devices(C LX5EF)  
CPR and AED: The Chain of Survival(FAD8EFV)  
Defensive Driving(DEFSEFV)  
Demo Course(DEMO)  
Demo Course - DPC 2/21/12(DEMO112)

[Select](#)

Be sure to **Filter By Curriculum** if the Course has been added to a Curriculum.

Highlight the Course or Courses to be assigned and then click the **Select** button.

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.

The Course(s) selected on the previous screen will appear here at the top.

Group **Filter(s)** (i.e. Role) can be used to shorten the list of available users. Apply the required Group filter(s), then **Click to Show Records** button to display list below.

Select the user(s) and click arrow keys to move the user(s) from the **Available** box into the **To Assign** box. Then click **Save** to move the user(s) to **Assigned**.

## Asset Formats – Summary

*For best results, the following file formats are recommended:*

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



- Helpful tips:
- Documents:** PDF preferred
  - Hyperlinks:** Allowed
  - Text:** All copied text will be stripped of formatting.
  - Largest file that can be uploaded:** 10MB



**Graphics – jpg, gif, 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, gif, 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.)

# CustomEase



## Content Management

> Course Authoring Permission

> CustomEase Courses

With **CustomEase** administrators (with permission) can:

- Customize and make modifications to existing **Interactive Courseware**
- Add, Edit or Delete Storyboards

Note: **CustomEase** and **Authoring Tool** share the same interface.

Course Name	Modified	Version	Course ID	Language	Curriculum	Category
Accident Investigation C3 (Video)		4.8.2	ROSE	English	DEFAULT	
Accident Investigation C3 (Video)		4.8.2	ACCD01EFV	English	DEFAULT	
Adv Vib-AC Induction Motors		4.8.1	VAC1EFV	English	DEFAULT	
Aerial Lifts (Video)		4.8.1	AERLEFV	English	Curriculu	
Aerial Lifts (Video)		4.8.1	AERLEFV	English	DEFAULT	
Aerial Lifts (Video)		4.8.1	AERLEFV	English	Brazil Ne	
Alternating Current		4.8.1	ACD9EFV	English	DEFAULT	
Asbestos Awareness (Video)		4.8.2	ASB2EFV	English	Audited F	
Asbestos Awareness (Video)		4.8.2	ASB2EFV	English	DEFAULT	
Asbestos in Construction		4.8.2	ASB7EFV	English	DEFAULT	Safety
Back Protection: Defending Your Safety Zone		4.9.1	BAK3EFV	English	DEFAULT	Safety
Back Safety (Video)		4.8.1	BCKSEFV	English	Safety Training For	Safety
Back Safety (Video)		4.8.1	BCKSEFV	English	DEFAULT	Safety
Back Safety (Video)		4.8.1	BCKSEFV	English	Mandatory Training	Safety
Back Safety (Video)				English	001 WR Feedback	Safety
Back Safety (Video)				English	Regulatory Safety	Safety



### 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**.

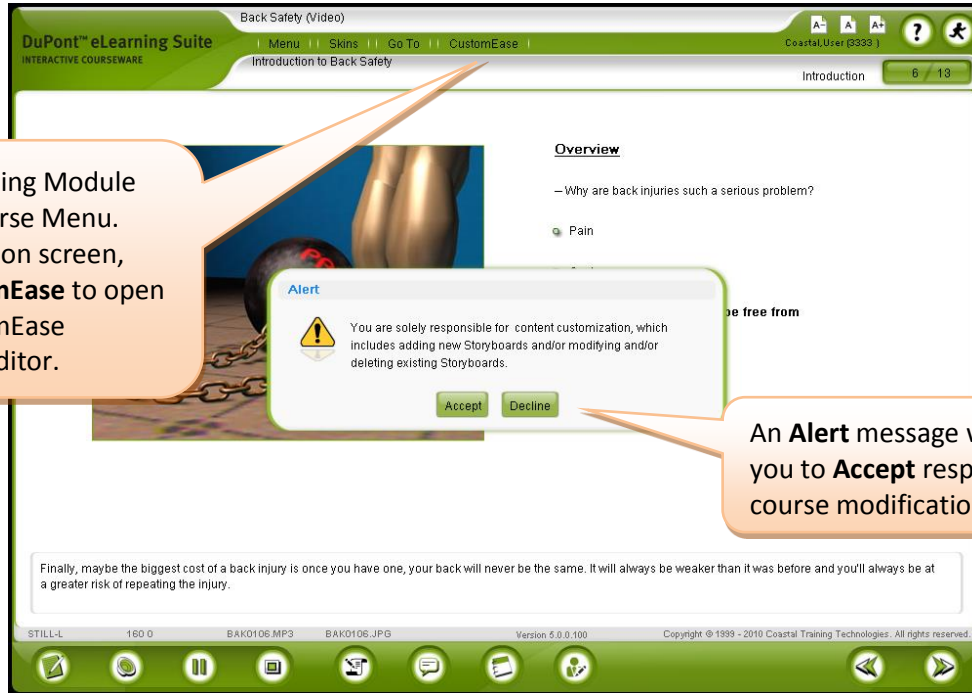
## Managing Course Editing:

Course Name  
 Accident Investigation (Video)  
Accident Investigation (Video)

The **'Checked-Out'** icon will display when a user is currently editing a course; all other users will be **'locked'** from opening the course – to prevent multiple users from editing the same course at the same time.

## Using CustomEase – Storyboard Editor

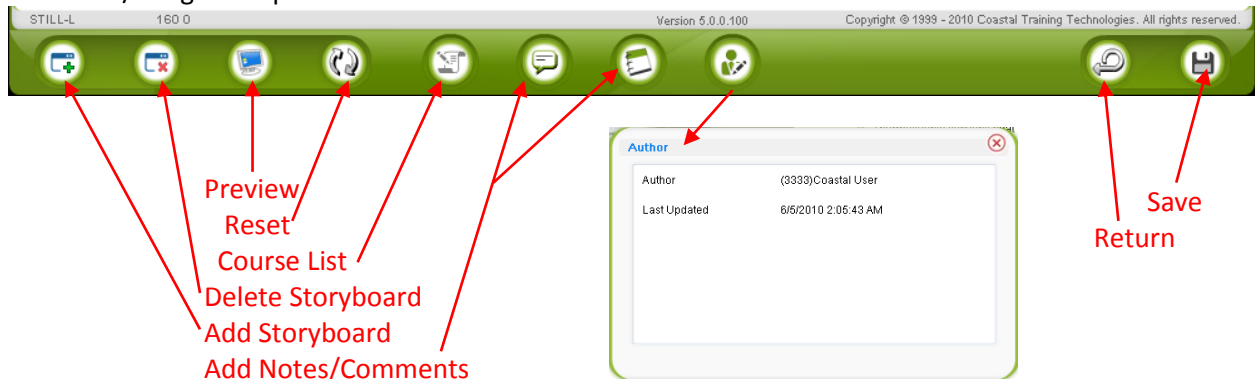
Enter the course. To access **CustomEase**, select a Training Module from the Course Menu:



**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 **CustomEase** are located at the bottom of the screen:

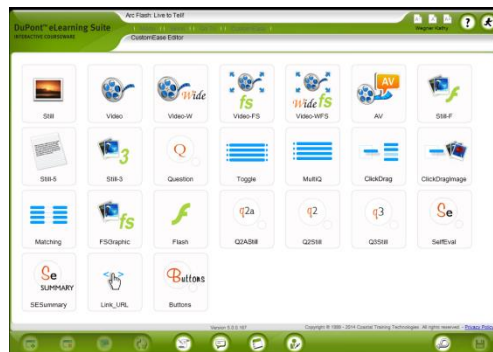


## Preparing to Customize Your Interactive Course

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 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 (*see pages 92 & 93 of this guide for detail*). 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

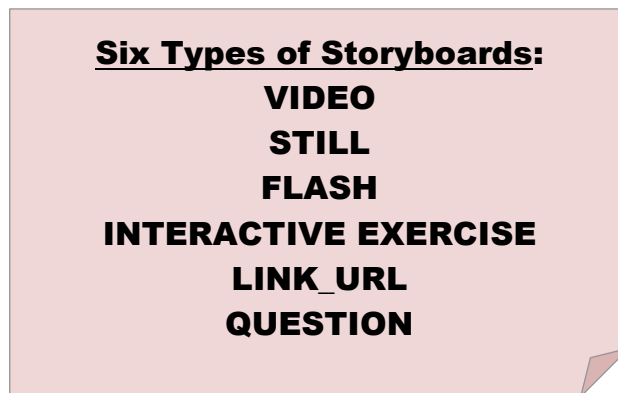
## Adding Storyboards

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.

## 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, GIF, 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.



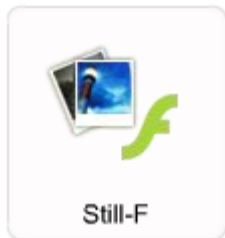
**STILL:** Graphic Image can be Left, Right or Centered at 400x300x72dpi. JPG, PNG, GIF, animated GIF. Support 9 Elements (except centered) and can be expanded. Narration Box, Audio file. Element image: 240x180



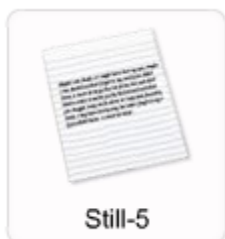
**VIDEO:** Video display can be Left, Right or Centered at 400x300x72dpi. FLV, WMV. Supports 9 Elements (except centered) and can be expanded. Narration Box. Element image: 240x180. Audio must be embedded in FLV file.  
**VIDEO-W:** same as Video (above), except video display can be Left, Right or Centered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

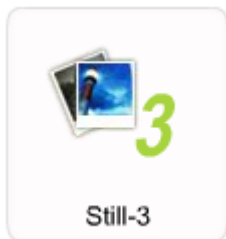


**STILL FADE:** Graphic Images can be Left, Right or Centered at 400x300x72dpi. JPG, PNG. Support 9 Elements (except centered) and can be expanded. Narration Box, Audio file. Images (2-9) fade in/out at 3-60 second intervals (set by Author) at same location. (Single image will remain still, not flash.)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



**STILL-3:** Graphic Image in 2 Columns at 400x300x72dpi. JPG, PNG, GIF. 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.



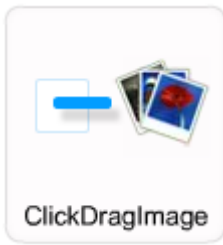
**TOGGLE:** Left, Right or Centered. 8 Elements Statements. Correct and Incorrect Choices. Question, Incomplete, and Answer Audio Files. 8 Feedback Audio Files.



**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.



**CLICKDRAGIMAGE:** Contains Question, Drop Image and up to 9 Drag Images. JPG, PNG only. No GIF. 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, GIF 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).





**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, no GIF), 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, GIF, 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.

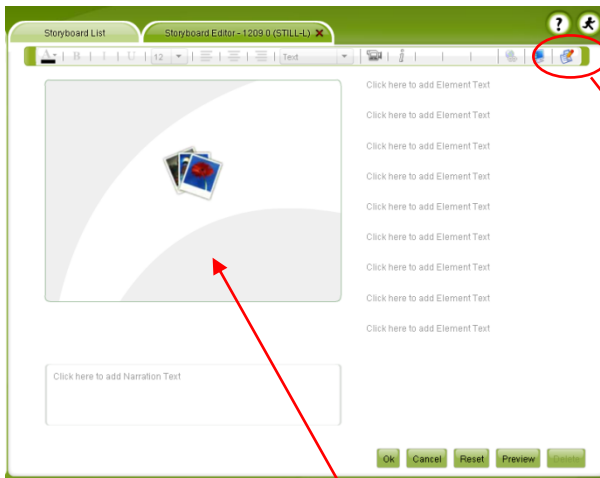


**BUTTONS:** This storyboard imparts information to the user by use of a series of storyboards to explain a concept. Contains images as hyperlinks. Mouse over the image and a hand icon appears. Clicking the image takes the user to a series of boards (all with same storyboard number.) Graphic image to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

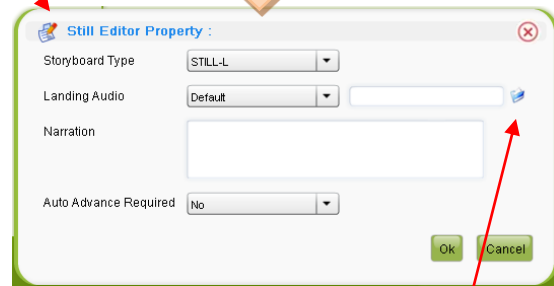
# Creating Storyboards

## EDITOR PROPERTY

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

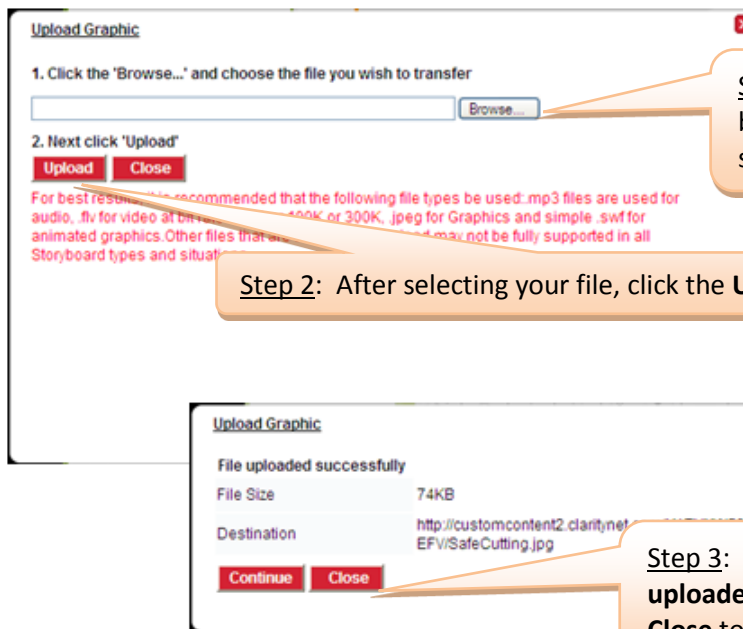


Click the **Property** icon to open the Editor Property to select **Storyboard Type**, Upload **Audio**, and type in **Narration** text.



## 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**:



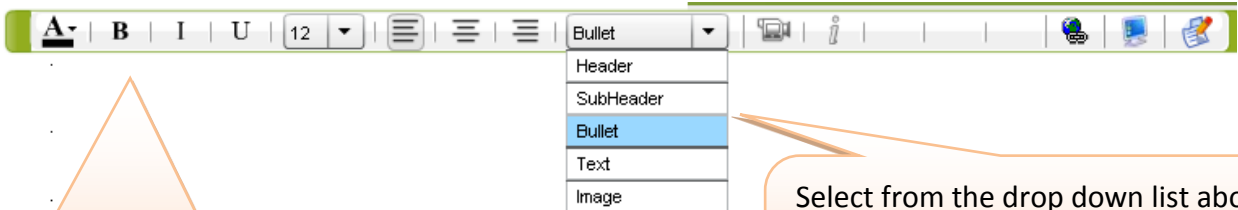
**Step 1:** Click **Browse...** button to search for and select your file to upload

**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

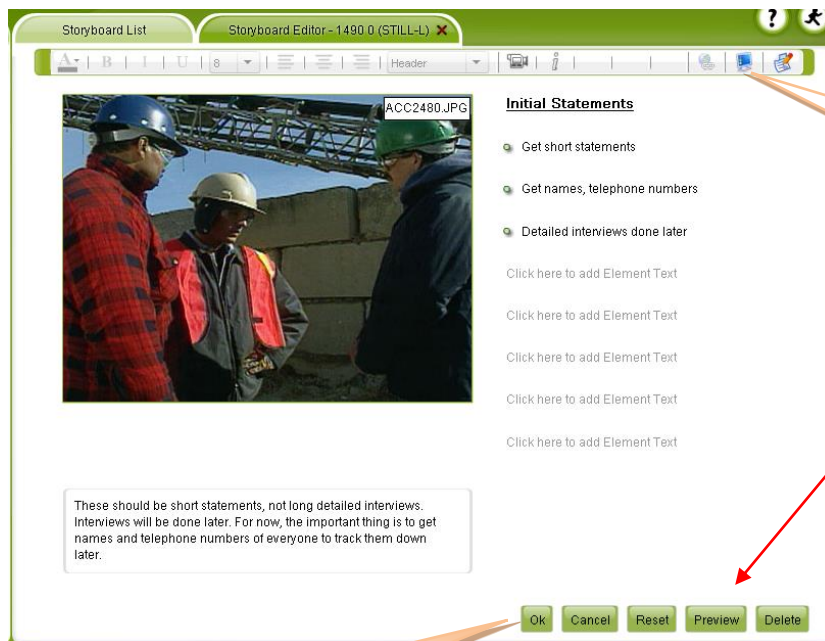
The format bar appears across the top of each storyboard. Storyboard text that is added in **Element Text Boxes**, **Narration Text Boxes**, **Header Text Boxes** and **Question Text Boxes** can be formatted with the help of the buttons seen on the Formatting Panel depicted below:



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

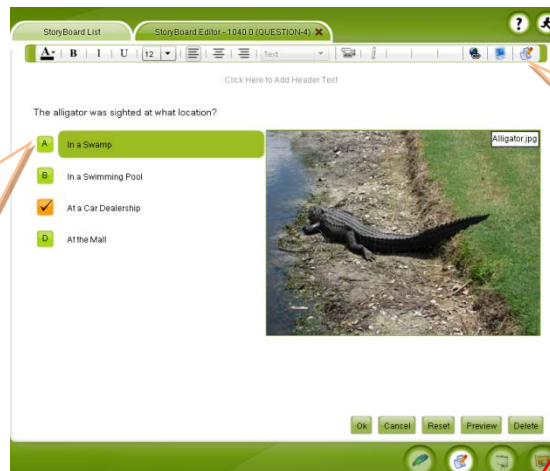
Training Modules may contain Questions. These questions can be designed to provide **remediation** if the question is not answered correctly. **Remediation** is the process of directing the user back to the learning screen (storyboard) which contains the correct answer to the question. The purpose of 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:

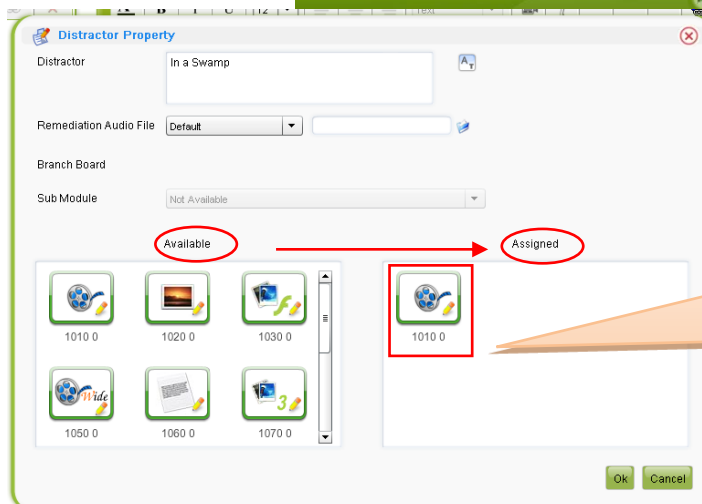
- 1) ALL remediation questions are created in a “**Training Module**” as part of a lesson.
- 2) Create the storyboard question and answers as you would for a test question.
- 3) The “**Property**” screen affiliated with each multiple choice answer is what differentiates a test question from a remediation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

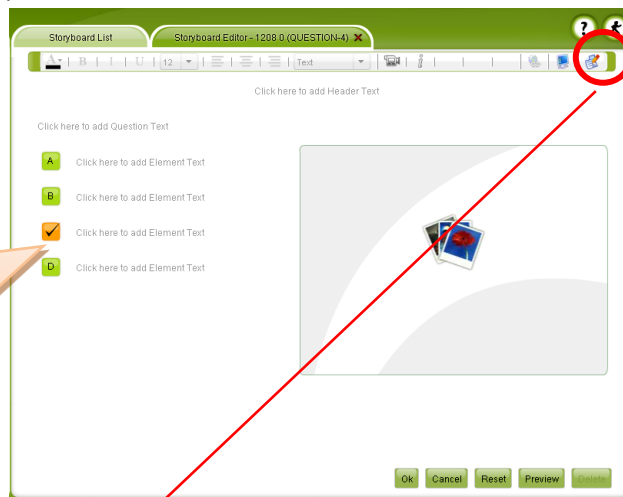
Question Storyboards created in Training Modules can only be moved to Self-Check modules if they are unassigned first and the Question Editor Property is updated.

## Test Questions & Question Banks

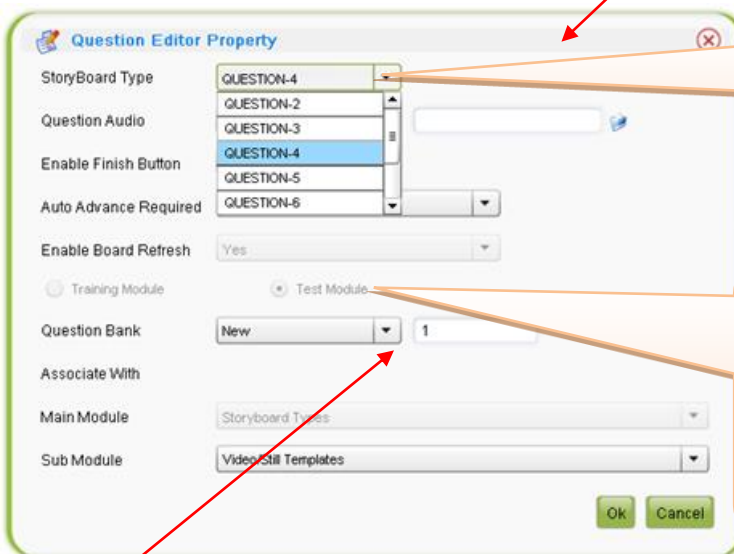
### Steps to Creating Test Questions:

- 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.)

Notes:

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