System Administrator
GOLD LMS Training Guide

Name:__________________________________________

Customer ID:____________________________________

URL: http://___________________________.claritynet.com

Your Login: ____________________________/

Technical Support: 800-946-8584

DuPont Sustainable Solutions
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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:

- 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 is on the network SPAM filter’s “white list”, if E-mail Notification is used.

Site Branding and Design

Login Page Graphics

Areas above and below the Login Information can contain customized text. Created in Global Options, Global Settings.
DISPLAY SETTINGS

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

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

The site can be branded with organizational colors.
Under the **Login Template** tab, multiple templates are available for changing/customizing the login screen. Login Templates may be set up for Desktop, Tablet and Mobile Devices.

Login Template 1 Example. Graphic image: size varies for devices. Does not support messages above login area.

Login Template 2 Example Graphic images. Header and 2 Background images. Login messages scroll across top of screen.

Login Template 3 Example. 2 Graphic images and 3 slide images can be loaded. Login messages scroll across top of screen.

**Note:**
Login Templates may be set up for: Desktop, Tablet and Mobile Devices.
The End-User Experience

The Learning Tab

The Learning Tab lists all assigned Courses and Events.

Tabs can be assigned to End-Users based on what they need to see and in what order. Custom Tabs can be created and displayed by Role.

LMS Course Status Labels: Not Started, Started, Mastered, InProgress, Expired, Certification Due. Each can be renamed in the LMS Text Editor.

The Employee User Experience:

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.

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

Learning Tab layout lists assigned Curriculums first, then Additional Learning, then Self-Registered Learning.
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.

Hands On Required is set by the Additional Hands-On Requirement setting in 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.

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.

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

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

The Email Certificate link is turned on in the Email Notification settings under Application Configuration.
INTERACTIVE COURSEWARE

User may send a Course-User Question to Admin From Within a FLASH Course email directly to an LMS Administrator via the Questions button, if turned on in Email Notification under Application Configuration.

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

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

SEVEN SKIN OPTIONS TO CHOOSE FROM:
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 manually.

Columns can be sorted Ascending or Descending by Last Name, First Name, and User ID.

Filters include Groups, User Record Status - Active, Inactive or On Leave.

Select the Filter Icon to Shorten the User list. The number of applied filters displays on the

The Add, Edit and Delete buttons are located at the bottom of the User List dialog box and appear with a red border when they are available (for users with full access permissions to modify user profiles as needed).
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.

Adding / Editing Users

Select the Expand Icon to see all details for this User.

User ID Character Limit: 256 characters, alphanumeric and no spaces (can accommodate email addresses).

Last & First Name Character Limit: 64 characters

Email ID Character Limit: 512 characters

Check Supervisor, Instructor and/or Proctor Post Test to assign those designations to this User.

Checking “Force Password Change” here will only apply to this user. To apply to ALL users, use Global Options setting.

A User’s Supervisor can be identified to enable Supervisor Approvals for Courses/Events, as well as for Reporting and to be copied on E-Mail Notifications.

Check all the Available Roles that will apply to this user. Also select their Default Role.
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).

**Additional Information** can be included for a **User** or a **Course** and is created in **Global Options**.

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

**Note:** Users (with permissions) can edit their own information (from 'User Icon under My Profile.')
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.

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.

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

Check item(s) to select and Save.

In this example, this administrator will only have access to the South America 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 user appearing on the list to create an e-mail that will be sent out immediately to the designated recipients.

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

Click in box to Check 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.

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

Click here to expand the template options.

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.
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.

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

Required courses display with an asterisk (*).

Unassigned Course(s) appear in red.

All assigned training – via Curriculum or Self-Registered – is displayed.

Completed courses display on the completed tab. User Completion Certificates can be printed from the Completed 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.

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

Note: Emails older than 60 days will be automatically deleted from the Inbox.
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.

Note: Although course links will open ‘Training Details’ page, Courses cannot be launched from this view.
Groups

There are 12 Main Grouping Fields.

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 Global Options.

Note: Groups will be utilized in the LMS for Sort Criteria used for making Training Assignments (Curriculums, Catalogs), setting Access Boundaries and filtering Reports.

To rename Groups, go to Global Options expand Groups then select the Group you want to update, click the Edit Icon at the bottom right of the Groups section.

Delete existing Group Name and Enter New Group Name then select Done.
Adding/Editing Group List Values

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

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.

**Character Limit:** 64 characters, alphanumeric
**ROLES**

Roles enable users to access LMS features. They are defined by a set of Permissions which enables dashboard tabs and application links 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, Edit and Delete 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.

**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 Report Mgr: Full access to Reports

System Admin: Full access permissions to all roles and to all LMS functionality.
CREATING A ROLE

Users who have full access permission to Roles can add, edit and delete user roles.

A suggested best practice for System Admins when creating a new Role: Select both **Backup System Admin** and **Employee User** from the Roles Security List and select the checkbox for **Inherit Permissions of Assigned Roles**. When you go to the Role - Permissions tab it will display those roles permissions and you can easily deselected unneeded functionality versus creating the Role completely from scratch.
**Role Permission**

Once the Role has been created and named, users with full access permissions can then set the Permissions and make Assignments:

In the example below, the Permissions for *System Admin Report Mgr, Settings & Configuration* are unchecked; therefore, the user cannot view these areas. The Permissions for *Report Management* include **Full Permissions**, giving the user full access rights to this LMS functionality.

---

**Administrator Permissions page:**

Collapsed View:

![Collapsed View](image)

**Expanded View:**

![Expanded View](image)

Check Allow box for the LMS Home Under Dashboard Tabs to enable the LMS functionality boxes under the LMS Home section lower on the screen.

A role can have Add/Edit capability. Select Deny or Allow to set up.
User LMS Home View:

Login view of user assigned only to the defined Role with Permissions to Report

Assignments

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

Select name(s) or group(s) from the Available list, Click the Save
The SupervisorName for an individual user can be updated on the User - General Information page in the Identification section. Select the Supervisor Name down arrow to display the list of available supervisors. Select the Supervisor Name and Save to update.

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

- Select the current supervisor from the Supervisor Name dropdown list.
- Select the new supervisor from the Transfer to Target Supervisor Name drop down list.
- All users assigned to the current supervisor will appear in the list. Select the Users to be transferred and Save to update.
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 / Log In Settings / Company Graphics

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

Options and functions can be set for Global Options, Login Settings, Course and Catalog List Pages, Email Notification, Groups and Additional Information fields. In the General Tab. Expand the section to review and set those options.

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

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

You can disable any or all of these options by selecting No so the Employee User won't see these items or functions on their Learning Tab.

Set to Yes to force ALL users to change their password upon first login.
### Catalog List Page

- **Show Default Catalog**: Yes/No
- **Courses Available for Catalogs**: All Courses/No Courses
- **Set Default Approval for Course Registrations for Catalogs**: No Approval Required/Supervisor Must Approve
- **For Users Without Supervisor**: Auto/Selected
- **Show Curriculum**: Yes/No
- **Show Catalog**: Yes/No
- **Show Date**: Yes/No
- **Show Duration**: Yes/No
- **Show Start Time**: Yes/No
- **Show Type**: Yes/No

**All Courses** can be selected here vs. individual course selection in Course **Properties** tab.

### E-Mail Notification

- **Report Scheduling**: Yes/No
- **Users**: Yes/No
- **Courses**: Yes/No
- **Curricula**: Yes/No
- **Events**: Yes/No
- **Assessments**: Yes/No
- **Email Course and Curriculum Certificates**: Yes/No

**E-Mail Notification** - enable or disable any or all of the available email types.
Click both **Done** and **Save** buttons to save your changes.

**Groups -** enable or disable any or all of the available **12 Group Types.** By default, the first 5 types are prelabeled – Region (Group 1), Group (Group 2), Division (Group 3), Department (Group 4) and Title (Group 5) and are enabled.

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

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

The site can be branded with organizational colors

Course Skins can be set for Flash version courses.

Log in templates can be created
E-Mail Notification

System administrators 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.

NOTE:

E-mails created in other areas of the LMS (Curriculums, Courses and Events) can be accessed via the E-Mail Notification section, which is the central repository for all emails created in the system. An explanation of the e-mails and their triggers can be located under the specific area of the LMS (Curriculums Actions, Courses Actions, Events Notifications) in this training guide.

A helpful tip: There is a three step process involved in activating notifications:

1. **ENABLE** - Each e-mail type is enabled in **Application Configuration**.
2. **CREATE** - A generic template is created for each E-Mail Notification type.
3. **ACTIVATE** - Check the active box to activate the template.

All three steps need to be completed before the e-mails will be automatically generated. Also the email 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, Email Details, Settings, Scheduling** and **Active**.

**NOTE:**
There are some notifications types that can only be created within E-Mail Notifications: **User-Reminder of Forgotten Password, User-Email to a Group, Course-Individual Training Summary, User-User Made Active** and **User-New User Welcome**.
(See the E-Mail Description & Trigger table on the next page)
User - Reminder of Forgotten Password
This e-mail is sent to users who request a password reminder.
This e-mail will be generated immediately upon selecting the Forgot Password link on the User's Login Page, after user submits their e-mail address.

User - Email to a User or Group
This is an ad hoc e-mail that can be generated for any reason.
There is no system trigger. This notification can be scheduled to go out at a designated time, or according to a designated schedule.

User - User Made Active
This e-mail is sent to inform a user that they have been activated in the LMS.
This e-mail is triggered by a system administrator changing a User Status (on User-General Information page) from Inactive to Active.

User - New User Welcome
This e-mail is sent to a user when they have been added to the LMS database.
This e-mail is triggered by clicking the Save button after adding a new user or when a User Import is done. (Note: E-mail notification must be activated prior to the import or manual save).

Course - Individual Training Summary
This is an ad hoc e-mail to notify users of their course statuses. Users are qualified to receive this notification based on the Course Status 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.
The system trigger is based upon the Keywords used in the body of the e-mail notification. It will only fire to users who qualify based on the 6 possible keyword triggers: “List Courses that”, 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.

Course - Instant Email to Users Assigned
This is an ad hoc e-mail that administrators can send to all users assigned to the Course.
There is no system trigger tied to this e-mail. This e-mail can be sent out immediately at will upon clicking the Save and Send Notification button.

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### E-Mail Notification Triggers

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<thead>
<tr>
<th>E-Mail Notification Triggers</th>
</tr>
</thead>
<tbody>
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<td>This e-mail is sent to users who request a password reminder.</td>
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<tr>
<td>This e-mail will be generated immediately upon selecting the Forgot Password link on the User's Login Page, after user submits their e-mail address.</td>
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<tr>
<td><strong>User - Email to a User or Group</strong></td>
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<tr>
<td>This is an ad hoc e-mail that can be generated for any reason.</td>
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<td>This e-mail is sent to inform a user that they have been activated in the LMS.</td>
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<td>This e-mail is triggered by a system administrator changing a User Status (on User-General Information page) from Inactive to Active.</td>
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<tr>
<td><strong>User - New User Welcome</strong></td>
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<tr>
<td>This e-mail is sent to a user when they have been added to the LMS database.</td>
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<td>This e-mail is triggered by clicking the Save button after adding a new user or when a User Import is done. (Note: E-mail notification must be activated prior to the import or manual save).</td>
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<td><strong>Course - Individual Training Summary</strong></td>
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<td>This is an ad hoc e-mail to notify users of their course statuses. Users are qualified to receive this notification based on the Course Status 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.</td>
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<tr>
<td>The system trigger is based upon the Keywords used in the body of the e-mail notification. It will only fire to users who qualify based on the 6 possible keyword triggers: “List Courses that”, 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.</td>
</tr>
<tr>
<td><strong>Course - Instant Email to Users Assigned</strong></td>
</tr>
<tr>
<td>This is an ad hoc e-mail that administrators can send to all users assigned to the Course.</td>
</tr>
<tr>
<td>There is no system trigger tied to this e-mail. This e-mail can be sent out immediately at will upon clicking the Save and Send Notification button.</td>
</tr>
<tr>
<td>Course - User Was Assigned</td>
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<tr>
<td>---------------------------</td>
</tr>
<tr>
<td>This e-mail is sent to the user when they are assigned to the selected course.</td>
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</tbody>
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<th>Course - User Was Unassigned</th>
<th>Selecting the User and Saving on the Course Assignments tab.</th>
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<tr>
<td>This e-mail is sent to a user when they are removed from a course.</td>
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<th>Course - Remind User to Recertify</th>
<th>The notification is sent to users whose course status is Mastered and is triggered by the user’s course Renewal Date.</th>
</tr>
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<tbody>
<tr>
<td>This e-mail is sent to inform user that their course certification is due to expire.</td>
<td></td>
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<tr>
<th>Course - User Failed to Recertify</th>
<th>When the user fails to renew the course before the Renewal Date; this e-mail is triggered when course status changes from Mastered to Expired.</th>
</tr>
</thead>
<tbody>
<tr>
<td>This e-mail is sent to inform user that their course has expired because they failed to retake it by the renewal date.</td>
<td></td>
</tr>
</tbody>
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<tr>
<th>Course - User Failed to Achieve Passing Score</th>
<th>The notification is triggered by the Post-Test Passing Score set in the Course Options Template.</th>
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</thead>
<tbody>
<tr>
<td>This e-mail is sent to notify users that they have not Mastered the course.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Course - User’s Certification Status was Reset</th>
<th>Resetting training data (Certification Status or Hands-On Complete) for users using the Reset Training Data application link will immediately trigger e-mails.</th>
</tr>
</thead>
<tbody>
<tr>
<td>This e-mail is sent to users when their course certification data is reset.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Curriculum - User Successfully Completed</th>
<th>This e-mail will be generated immediately upon completion of all the Required courses in the Curriculum.</th>
</tr>
</thead>
<tbody>
<tr>
<td>This e-mail is sent to users upon completion of a Curriculum.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Curriculum - User Was Assigned</th>
<th>Assignment of a User to a Curriculum on the Curriculum Assignments tab. *note: e-mail template needs to be created &amp; activated before assigning users</th>
</tr>
</thead>
<tbody>
<tr>
<td>This e-mail is sent to the user when they have been added to a curriculum.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Curriculum - User Was Unassigned</th>
<th>Un-Selecting the user and Saving on the Curriculum Assignments tab.</th>
</tr>
</thead>
<tbody>
<tr>
<td>This e-mail is sent to a user when they are unassigned from a curriculum they were assigned to.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Curriculum - Instant Email to Users Assigned</th>
<th>This e-mail can be sent out immediately, at will, upon clicking the Save and Send Notification button. No system trigger.</th>
</tr>
</thead>
<tbody>
<tr>
<td>This is an ad hoc e-mail administrators can send to all users assigned to the Curriculum.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Curriculum - Course Was Added</th>
<th>Selecting the Course and Saving on the Curriculum Courses tab.</th>
</tr>
</thead>
<tbody>
<tr>
<td>This e-mail is sent to users assigned to this curriculum when a course is added to it.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Curriculum - Course Was Removed</th>
<th>Un-Selecting the Course and Saving on the Curriculum Courses tab.</th>
</tr>
</thead>
<tbody>
<tr>
<td>This e-mail is sent to users assigned to a curriculum when a course is removed from the curriculum.</td>
<td></td>
</tr>
</tbody>
</table>
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 Curriculum

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/Check courses from the list of Available Courses Click the Save button to Assign the Courses.
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.

Select which courses will be Required versus Optional.

Use the arrow buttons to arrange the courses in the order they are to be taken.

Decide combination of required/optional courses to determine curriculum completion.

Checking the box to Enable Sequential Access for Required Courses requires that courses to be taken in sequential order (i.e. prerequisite order). The next course will be inaccessible to the user until they have completed the prior course in the list.

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

A statement will appear under the Curriculum name defining the number of required/optional courses that must be completed.
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.
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.

**Modules - Modifying the Menu Structure of Courses**

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

Unchecked **Modules** will not be visible to the User.

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

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

Select the relevant group name from the list

Select/Check relevant group name(s) from the list. Click the Save button to the **Assign** groups.
Courses

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

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

**Edit Courses**

Inactive courses will appear in a different color.

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

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

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

Properties

Course properties can be set from the Properties tab.

Course Policy & Course Outline can be uploaded here.

If course is Available for Open Registration in Catalog and requires Supervisor Approval, both options can be set here (as well as in Global Options for all courses).
System administrators 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**.

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

System Administrators with full permissions can Add and Edit Course Option Template Lists 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 down arrow icon next to each item to expand the content of that section.

**Character Limit:** 128 characters
Course Option

Listed below are screen shots and definitions of each option/setting, by section:

**Course Options**

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

**Course Completion Options**

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

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

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

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

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

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

### Testing Options

Check box to activate & select radio button to edit options

Note: These 3 options only display when ‘Yes’ is selected for ‘Pre-Test Enabled.’ Otherwise, they remain hidden.
Pre-Test Enabled: Default is No. If Yes, the Pre-Test runs first and user must complete the Pre-Test before being allowed to enter a course.

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

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

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

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

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

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. (*Proctor Post Test checkbox on User List User’s General tab).

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

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.
**Used Functionality Options**

<table>
<thead>
<tr>
<th>User Functionality Options</th>
<th>Check box to activate &amp; edit options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show Default Skin</td>
<td></td>
</tr>
<tr>
<td>Show Bit Rate</td>
<td>Yes, No</td>
</tr>
<tr>
<td>Bit Rate Default</td>
<td></td>
</tr>
<tr>
<td>Complete All Modules Sequentially</td>
<td>Yes, No</td>
</tr>
<tr>
<td>Must Pass All Self-Checks to Unlock Post-Test</td>
<td>Yes, No</td>
</tr>
<tr>
<td>Click “Finish” After Each Question</td>
<td>Yes, No</td>
</tr>
<tr>
<td>Review Test Enabled</td>
<td>Yes, No</td>
</tr>
<tr>
<td>Show Comments</td>
<td>Yes, No</td>
</tr>
<tr>
<td>Show Notes</td>
<td>Yes, No</td>
</tr>
<tr>
<td>Enable Auto Advance for Storyboards</td>
<td>Yes, No</td>
</tr>
</tbody>
</table>

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

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

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

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

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

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

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

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

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

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

Check box to activate & edit options next to the checkbox

<table>
<thead>
<tr>
<th>Option</th>
<th>Default</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show Score Screen</td>
<td>Yes</td>
<td>Default is Yes (will display score screen at completion of test). If No, the score screen will be hidden from employee user.</td>
</tr>
<tr>
<td>Print Certificate</td>
<td>No</td>
<td>Default is No. If Yes, users can print their own completion certificates.</td>
</tr>
<tr>
<td>Force Course Feedback</td>
<td>No</td>
<td>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.</td>
</tr>
<tr>
<td>Disable Post-Test After User Masters the Course</td>
<td>No</td>
<td>Default is No. If Yes, the Post-Test link will be disabled once the user masters the course.</td>
</tr>
<tr>
<td>Allow Video Fast-Forwarding</td>
<td>Yes</td>
<td>Default is Yes. If No, video progress bar is disabled to prevent user from fast-forwarding video clip.</td>
</tr>
<tr>
<td>Course Timer</td>
<td>No</td>
<td>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.</td>
</tr>
</tbody>
</table>

Redirection Options

Check box to activate & edit options

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

Redirection URL - Not Mastered: When a User fails the Post-Test, the user will automatically be redirected to the URL specified in this tab.

Show Asset Selection: The default is No. If Yes, it will provide users with an asset path to access assets while launching an Interactive Course.
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 **Arrow buttons** available to adjust the order of feedback questions.

Show Comments is used to allow employee users to write their comments while taking the course or at the end of the course.

Arrow buttons to move courses up or down.

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

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

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

- **Default Course Certificate-Normal**: standard 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.

A helpful tip: In the Certificate list page, the certificate templates that are highlighted in red are the default certificates; templates in black are the created certificates. The Active, Certificate Type and Certificate Size options will not be available for modification. Certificates cannot be deleted without unassigning them from the Course or Curriculum they are assigned to.
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.

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

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

Click **the upload icon** to upload an image to the certificate; which will then appear in the “Images” dropdown window.

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

Assigning Certificate Templates

To assign courses or curriculum to certificate templates, **Select the Courses and Save.**

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

Roles that have full access permission to **Reset Training Data** are able to clear training records from the LMS that have been recorded for a course.

Options are available to reset each of the individual records or all the records for a user.

Select Course(s)

If the course has been added to a Curriculum, be sure to **Filter by Curriculum** 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 select the desired course(s).

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

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

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

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

The Classroom & Hands-On Scores feature allows instructors to apply scores for users of Classroom and eLearning 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.

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 deselected (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:

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

Select/Check the user(s) to score then choose from the following options:

Score: Instructors enter a numerical percentage value.

Enter Post-Test Date and Post-Test Score (%).

Select Instructor from dropdown or select checkbox for Other to type in Instructor name.

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.

Enter Post-Test Date. Select one Status: InProgress or Mastered.

Check the Hands-On Complete checkbox before saving, if this course has the ‘Additional Hands-On Requirement’ selected in the Course Options Template and this entry is to satisfy that requirement.
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.

**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, Delete, Design and Run Reports. Reports are delivered through HTML Reports and can be exported into .XLS, .PDF, and .CSV formats.

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

Filter Report Criteria

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

Select the Report you want to run from the list and click the Run Report Button.

Select one at a time from any of the available filter links, to set your filters.
Using the Report Filters

Below is an example of Filter selection, using the Course Status field. What appears on the list is determined by the User Access Boundaries set by the system administrator. Select from any, or all, of the available options listed.

![Course Status filter example]

Multiple selections can be made. Click Done to save.

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

![Report filter options example]

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** check box
- **Process Report**, **Save Criteria**, **Reset** buttons

**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.

- **Export To** dropdown
- **Export** to options
- **Print** icon

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

- Use the arrow keys here (or the same ones in the lower left corner) to page through the report.
List of Available LMS Reports

Assignment Exceptions: This report enables the system administrator to view the users who had assignment exceptions and the type of exception applied to them, including ‘Modified By’ and ‘Modified Date’ columns on the report.

Classroom: Lists details of each classroom (Classroom ID, Classroom Name, Classroom Type, Maximum Number of Participants, URL). Can filter by Classroom Name.

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 Usage: Lists by Course Name the number of licenses In Use. Can filter by Course Started Date, Course Type, and Course Name.

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

Curriculum Course Assignments: Show what courses are assigned by Curriculum as well as date course was last updated and by whom. Can filter by Curriculum Name, Course Name, Course Assign Status.

Curriculum Group Assignments: Shows what Group Types and Group Names are assigned to each Curriculum. Can filter by Curriculum Name, Group Type, Status.

Curriculum Users Assignments: Shows what Users are assigned to each Curriculum. Can filter by User Name, Curriculum Name, User Assign Status.

DB Active Users-Courses: This dashboard report gives a graphical (bar chart) representation of records for User Count by Active Courses and Logged Users. Not filterable.

DB Category Wise Status: Graphical dashboard report displays the User Count and the Category name for each course. Pie chart shows Category usage by percentage. Not filterable.

DB Hourly Logged Users: This dashboard graph shows details of how many users have been logged in for every hour. Not filterable.

DB User Course Status: This dashboard report displays user count for every course status (Not Started, Started, In Progress, Completed, Mastered, Expired) irrespective of curriculum. Not filterable.

Expiring Certification Report: Lists users who are certified and the date certification will expire (Renewal Date). Can filter by User Active, User Name, Course Name Curriculum Name, Renewal Date, any of the Groups, Course Type, Role Name, Last Test Taken Date.

Most Missed Question: Lists the most missed questions for a course, displaying storyboard number and question text of the missed question, number of times question was asked, number of times question was missed, percentage of times question was missed. Can filter by User Name, Curriculum Name, Course Name.

New Usage: This report displays the date a User first enters any course. Can filter by User Name, Course Started Date.

Roles and Permissions: This report lists the permissions set for roles. System administrators may filter the data by Role 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.

Supervisor Users Planned vs. Completed Report Summary: Displays summary of user planned vs. completed report for each supervisor. The first page opens as main report with a Show Detail link which opens a sub-report displaying detail of each user that reports to this supervisor. Can filter by Supervisor Name, Course Name, Curriculum Name, or Group. Can process Summary without Sub Report.

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. System administrators may filter by Curriculum Name, Course Name, Assignment Type, Assignment Group Value, Required or Optional, Assignment Combinations, Course Options Template.

NOTE:
This report will not show records of curriculum that are not associated with a group or an assignment combination.

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

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

User Certified Wallet Certificates: User Completion Certificates are stored electronically and can be printed (wallet size). System administrators may filter by 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 Course Comments: Displays course Comments for all courses, including User Name and User ID. Can filter by User Active, User Name, Course Name, Course Started Date, Course Type, Role Name, Curriculum Name, any of the Groups.

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

User Curriculum Completed: This report lists the users who have mastered all the required courses of a curriculum. Can filter by User Active, User Name, Curriculum Completed Date, Role Name, Curriculum Name, any of the Groups.

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

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

Users Access Boundaries: This report lists the Groups, Course Option Templates and Curriculums that the user has permission to access. System administrators may also view a detailed report listing the User ID with Assignment Type and Assignment Name. System administrators may filter data by User Name, Curriculum Name, Course Options Template Name, Assignment Type.

Users with No Training: Lists users who have not been assigned to any training. Report will display User Name, User ID, and Groups. Can filter by User Active, User Name, Curriculum Name, and of the Groups. This report cannot be edited.

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

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.
Select/Check user(s) then click **Save** to Assign Users.

Group **Filter(s)** (i.e. Role) can be used to shorten the list of available users.
CustomEase

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

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

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

Managing Course Editing:

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.
Flash Course Customization

Courses with the course type of Interactive Courseware are Flash courses.

Asset Formats - Summary

For best results, the following file formats are recommended:

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

Helpful tips:

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

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.)
Using CustomEase – Storyboard Editor
Enter the course. To access CustomEase, select a Training Module from the Course Menu:

Select CustomEase to open to the CustomEase Storyboard Editor.

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

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

Navigating CustomEase – Options
The menu/navigation options for CustomEase are located at the bottom of the screen:

Preview - Delete Storyboard - Reset - Course List - Preview - Course List - Add Storyboard - Add Notes/Comments - Return - Save
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:

![Storyboard Type Page](image)

Select a Storyboard by clicking on its icon. Each Storyboard icon is described in more detail in the upcoming pages.
**Six Types of Storyboards:**

- **VIDEO**
- **STILL**
- **FLASH**
- **INTERACTIVE EXERCISE**
- **LINK_URL**
- **QUESTION**

### Storyboard Types

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

- There are 24 different storyboard Templates available.
- Each Storyboard is designed for a specific purpose or function.
- The VIDEO storyboard is the only one that can contain video clips. FLV and WMV are the only file format types it is designed to accept. It cannot accept JPG, MP3 or any other type of file format. Audio should be embedded within the FLV file; there is no ability to upload a separate audio file (MP3) on the Video storyboard – only on the AV storyboard.
- STILL storyboards are designed to accommodate JPG, 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 accept a web address (include the full http:// part of the URL). This storyboard can be used to direct the user to a website or to attach a document within the course.
- QUESTION. There are two types of questioning techniques utilized within the Authoring Tool:
  1. **Embedded (Content) Questions** – part of a lesson module, to provide remediation. Created in ‘Training Module.’ Not for test score.
  2. **Test Questions** (Self-check, Post-test) for a SCORE. Created in the Self-Check Module. Post-Test questions pull from Self-Check question banks. All questions pulled randomly from question banks.
Storyboard Templates - 1

**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.
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.
**Storyboard Templates - 3**

**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).
**Storyboard Templates - 4**

**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**.

### Formatting 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

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.)
HTML5 Customization

Courses with the course type of Interactive Courseware are Flash courses.

Select and Open or double click to Open a course.

Assets Formats - Detail

Managing Course Editing:

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

Courses that have been modified in CustomEase will display the icon under Modified.

HTML5 Course Customization

Content Administrators Can Add, Edit and Delete storyboards in each course chapter. HTML5 CustomEase will work in Desktops, Laptops and Tablets.

HTML5 Asset Formats –

The following file formats are system compatible.
Helpful tips:

**Documents:** PDF preferred  
**Largest file that can be uploaded:** 75MB

---

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

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

---

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

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

---

**Video – MP4**

**NOTE:**  
Raw file format such as AVI, MPG, and MOV are not accepted; you will need to convert to MP4 format.
Using CustomEase – HTML5 Storyboard Editor

To access CustomEase, open the course and open a Training Chapter from the Course Menu:

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

**NOTE:**

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

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

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

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

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

3. **Develop and Organize Course Assets.** Assets are digital files that contain essential course content. They include audio, video, graphics, and text files. Before customizing a course, make sure your assets meet the following criteria:
   a. You must have legal right to use the assets;
   b. The assets are in a final format (see pages 92 & 93 of this guide for detail).

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

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

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

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

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

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

- Each of the 5 different storyboard Templates are designed for a specific purpose or function.
- The Streaming storyboard is the only one that can contain video clips MP4 is the only file format it is designed to accept. It cannot accept JPG, MP3 or any other type of file format.
- Recall storyboards are templates that include text and audio that give direction for reviewing a chapter. The templates can be modified or used without update. There are 3 types of Recall storyboards.
  - Recall Initial (Intro Recall or Recalls that are not followed by self-check)
  - Recall Subsequent (Recall before self-check)
  - Recall Final (Summary Recall board linking to all chapters, before final test)
- Still storyboards are designed to accommodate JPG, GIF, PNG, files for the Graphic upload and MP3 files for the Audio upload. They are not designed to accept MP4 Video files.
- The Link_URL storyboard is designed to accept a web address (select http:// or https:// and enter complete URL with www). This storyboard can be used to direct the user to a website or to attach a document within the course.
- Question. Comprehensive Test questions pull from course chapter recall questions. All questions pulled randomly from question banks.
Storyboard Templates

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

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

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

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

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

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

**QUESTION BANKS**: Contain multiple variations (i.e. 4) of a question. One variation from each bank will appear in Tests.
When you select the Streaming Storyboard you will need to upload and insert a video file.

The question icon displays help details for the different location that Assets are uploaded from.

<table>
<thead>
<tr>
<th>Asset Upload Option - Help Content</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Custom Asset File</strong> : If you wish to use your own asset, such as a photo, upload that file here by selecting the upload option and browsing your computer.</td>
</tr>
<tr>
<td><strong>Asset URL</strong> : If you wish to use an asset that resides on another server, such as a photo stored on your company's network, enter that URL here, for example: <a href="http://www.training.dupont.com/images/still1.jpg">http://www.training.dupont.com/images/still1.jpg</a>.</td>
</tr>
<tr>
<td><strong>DuPont Asset Code</strong> : If you wish to use a video asset from another HTML5 storyboard (for example if you want to use an asset from another course or from another storyboard within this same course) enter the asset code here.</td>
</tr>
<tr>
<td><strong>DuPont Asset File</strong> : If you wish to use a video, audio or image asset from another storyboard (for example if you want to use an asset from another storyboard within this same course) enter the asset filename here.</td>
</tr>
</tbody>
</table>
Still storyboard Audio should be added first since graphics are changed based on the audio cue, point (see below).
There are 3 selections for the Recall Storyboards:

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

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

**Recall Final**, - The *last or summary chapter* before the Comprehensive Test uses the Recall Final storyboard.
Upload Assets Recall Storyboard continued

Recall Initial

Recall Subsequent

Recall Final
After you select the Recall Storyboard and select OK you can add **Key Term recall/review content** to the Key Term field. Select the Key Term Text field then the Property Icon.

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

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

The Recall Final Storyboard **Key Term Elements link** back to previous course chapter Recall Storyboards.
Questions & Question Banks

If a Chapter includes a Recall storyboard then the Question storyboard is not available in the Add Storyboard screen. All Question storyboards must be added after the Recall storyboard.

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

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

Select Question Bank or create new one. Each question belongs to a question bank. Only variations of same question belong in same question bank. All questions will default to one (same) question bank if one is not selected. (This results in only one question showing on test.)
Questions & Question Banks

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

The format text toolbar automatically displays when you select text.

Key Term Element

Key Term Type: Subheader
Key Term Text: How Do People Become Infected?
Definition Type: Text
Definition Text: When BBP enters your body through:
- Mucous membranes
Audio: DuPont Asset File

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

Delete Storyboards

Do you want to delete this Storyboard?

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