HR Learn

Product Documentation

Administrator Manual

Overview:

This manual covers all areas of the HR Learn LMS related to the abilities of the Administrator.

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Product Support

If you have purchased a support package and have any questions during the use of HR Learn that are not addressed in this guide, please visit our support site at: https://acendrelearn.zendesk.com/

Or contact us at:
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Overview

This manual covers all areas of the HR Learn LMS related to the abilities of the Administrator (not to be confused with the System Administrator, which is a role that may be granted to a user; the Administrator is not a user, and not a role; the Administrator and the System Administrator user both share similar permissions, but there are differences, as explained in this manual). This is a thorough examination of the functions and features of HR Learn. This manual reads in the order of how the system's menus are organized. For a manual written with function in mind more so than form or appearance, please view our Implementation Guide.

Review user guides, manuals, technical notes, sample SCORM packages, and white papers on the HR Learn Support site at https://acendrelearn.zendesk.com/.

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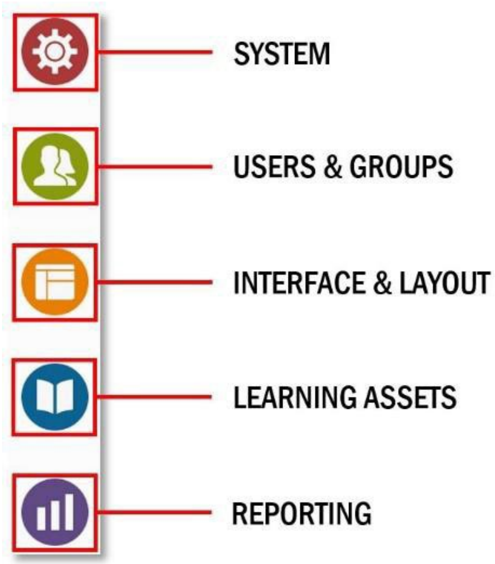
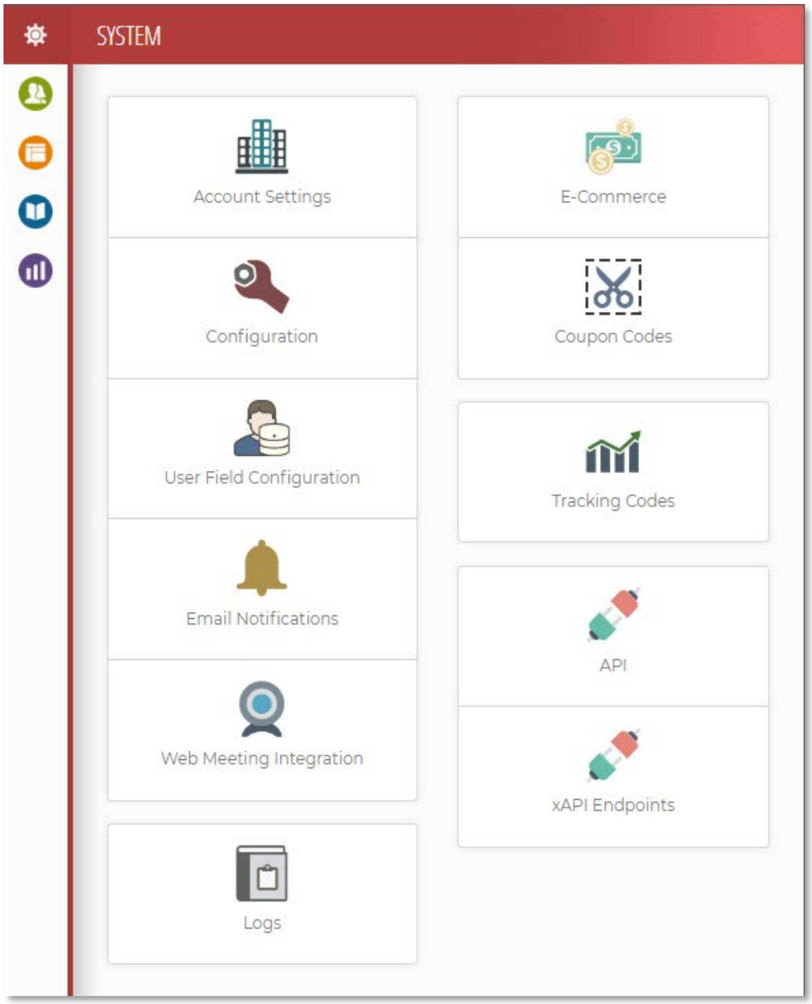
Administrative Menu



The administrative items on the left side of the interface can be seen by the Administrator. When clicked, each menu item brings up a list of additional menu items.

Users will only be able to see the pages and options within those menu items depending upon the permissions given by their role, set up in the Roles section of the Users & Groups menu, and granted to them in the Roles section of their profile.

System



Account Settings

Portal Name – This is the name of your portal, which will appear in the top of the window when your users navigate to your portal.

Portal Hostname – The subdomain of your portal's URL (account-name.inquisiq.com).

Note: The hostname can only be changed by an Acendre support representative. Contact support to change your subdomain.

Default Language and Default Timezone – Users will see this language upon loading your site and all class times will be given in this time-zone's time, unless the time zone is set differently in the learner's profile.

Login and Password – Sets the login and password for the Administrator account.

Note: Users assigned an Administrator role are not able to change the password for the Administrator account. Only the Administrator (non-user) can change the password.

Company and Contact Name – Information about the Administrator (non-user). A few notes on these parameters:

- This information does not appear to learners or any users in a role without access to the Account Settings section of the System menu.
- Message Center messages from the Administrator (non-user) will appear to recipients as from "Administrator".
- In the body of Email Notifications, when the recipient is the Administrator (non-user), the Recipient placeholders pull "[Administrator]" as the name (both full name and first name).
- To show your users your contact information, use the Footer section of Interface & Layout.

Email – System Administrator email address. This is where all emails directed to the System Administrator are sent (Email Notifications, etc).

Configuration

Login Setup Tab

Self-Registration – When "Allow users to create their own accounts" is checked, creates a “To create an account, register here” link in the login window. You can either use the buInstructor Led Training- in user registration page or use your own form on an external URL. If you are using an external form, you must have your page set up to use API to send the user information to the LMS and create a user account. For more information, please refer to our API manual at at https://acendrelearn.zendesk.com/.

When “Require new user registrations to be approved by an administrator” is checked, a Pending User Registrations Widget will be added to the Administrator dashboard. Every time a new user registers, their information will appear in the Widget, and the Administrator will be given the option to either accept the registration and allow the new user account to be created, or reject the registration so that the user may not log in with that username, nor may any other person register with that same username.

Reset Password – When checked, creates an “I forgot my password” link in the login window.

Default Landing Page – The page users will immediately be brought to upon login.

Simultaneous Login – When checked, allows multiple browser sessions/computers/people to log in with the same username at the same time. When unchecked, it enables the Login Priority options below.

Login Priority – When “Simultaneous Login” is unchecked, you have the option to either give login priority to whoever logs in to the username first, or whoever most recently attempts to log in.

Widgets Tab

Checked boxes enable the Widgets that appear on My Dashboard. The Administrator (non-user) has access to different Widgets than users, and users with different roles have access to different Widgets.

Catalog Tab

Control what your users can and cannot see in this section.

Enable Catalog – When checked, users will be able to access your course catalog. When unchecked, the “Catalog” button will not appear in the top menu, and the rest of the options in the Catalog tab will be unchecked and greyed out.

Enable Catalog Search – When checked, a search bar will appear in the Catalog page.

Enable Catalog Event Calendar – When checked, a calendar will appear in the Catalog page with upcoming classes marked in it with a stop-watch icon.

Require Login – When checked, users will not see the “Catalog” button in the top menu until they log in.

List Private Course Catalogs – When checked, users will be able to see the names of private course catalogs, but not be able to open them or access the courses within them.

Hide Course Codes – When checked, anyone not logged in will not be able to see course codes in the catalog, if there are any.

Enable Instructor Led Training Browsing – When checked, Instructor Led Training modules set to allow Standalone Enrollment will be visible in the catalog. When unchecked, they will not appear.

Enable Learning Path Browsing – When checked, published Learning Paths will be visible in the catalog. When unchecked, they will not appear.

Enable Community Browsing – When checked, Groups with the "Self Join" option checked in their Properties will appear in the catalog. When unchecked, no groups will appear in the catalog.

Leaderboards Tab

Determine how the leaderboards are ranked here. Rank the leaderboards according to number of courses completed, course credits earned, certificates earned, or certificate credits earned.

Each box that is checked creates an option in a drop-down in the Leaderboards Widget (if only one box is checked, there will only be one option in the drop-down).

Note: When all boxes in this section are un-checked, leaderboards are disabled, and the Leaderboards Widget does not appear on My Dashboard.

Ratings Tab

You can allow users to rate your courses, and you have the option to either make the ratings public, or keep them invisible to other users, and only be able to see them in your reports and individual course settings.

A few notes relating to these options:

- When you have ratings enabled here, you can enable or disable ratings within eachindividual course's Properties section.
- Users may only give a course a rating upon completion of the course.

Privacy Tab

To maintain users' privacy, you can allow users to opt out of email notifications and/or permanently remove users' data from the system once their account has been deleted.

User Field Configuration

Instructions Tab

Use the WYSIWYG text box to set up the instructions above the registration form that your users see when they click the "To create an account, register here" link (if Self-Registration is enabled in the Login Setup tab of the Configuration menu).

Data Fields Tab

Field	Label	Admin View	User View	Reg. Form	Req.	Options
section1	**Account**					
isActive	Status	☑ View ☑ Modify	☐ View ☐ Modify	☐ View ☐ Modify	☑	
firstName	First Name	☑ View ☑ Modify	☑ View ☑ Modify	☑ View ☑ Modify	☑	
middleName	Middle Name	☑ View ☑ Modify	☑ View ☑ Modify	☑ View ☑ Modify	☐	
lastName	Last Name	☑ View ☑ Modify	☑ View ☑ Modify	☑ View ☑ Modify	☑	
avatar	Avatar	☑ View ☑ Modify	☑ View ☑ Modify	☑ View ☑ Modify	☐	

These are the data fields that appear in different user creation sections. You can re-name the fields by clicking the button next to each field in the "Label" column.

The column "Admin View" enables fields in the user's profile accessible by an administrator with User Creator and/or User Editor role permissions. The column "User View" enables fields in the user's profile accessible by the user. The column "Reg. Form" enables fields in the user registration form accessible by anyone who has clicked the "To create an account, register here" link. The "Req." column denotes whether a field is required (checked) or not required (unchecked) to be filled out.

When you click the button in the "Options" column for each field, you can give the field a **Description** to convey to users in more detail the kind of information that field requires and you can limit the kinds of characters and number of characters your users can input in the field using the **Regular Expression** box.

When **User Field Upload** is checked, users will be able to upload files to their User Profile to view at any time.

User Agreement Tab

You can specify terms of an agreement between your organization and your users here, and you can also require that your users agree to the agreement when they register.

Form Previews Tab

Each link opens a window that shows what administrators, users, and registering users see, respectively. The “Administrator View” link shows the user profile viewed as an administrator, the “User View” link shows the user profile viewed as a user, and the “Registration Form” link shows what the new user registration form looks like.

Email Notifications

Create emails that trigger automatically based on events that occur within Inquisiq.

To create a new email notification, click the “New Email Notification” link at the top of the page. To update the properties of an existing email notification, click on the name of the email notification in the list.

Properties Tab

Name – Serves as a label for the notification. The person who receives the email will not see the name of the notification in the message itself. The name is for administrative tracking purposes only.

Status – Enable or disable the notification by setting it to Active or Inactive, respectively.

Event/Recipient – Indicate the event which triggers the message to send, and to whom the message shall be sent. Note that "System Administrator" includes both the Administrator (non-user) and any users granted specifically the System Administrator role, if any.

From/Reply-To – If you would like for the message to have a from/reply-to email address, you can put one here. If left blank, the from/reply-to on the message will be no-reply@inquisiq.com.

Send – Certain events allow the message to be triggered at a specified amount of time before or after the event occurs.

Message Tab

Subject – Will appear as the subject of the email to the recipient.

Priority – You can mark the email as low or high priority, if you wish. Normal gives the message no priority.

Type – You can choose the between plain text and HTML based formatting for the body of your email notification.

Body –The message the user will see in the email. Use Placeholders to have the message auto-fill information regarding the specific course, user, and/or event trigger. For example, in the beginning of the message, you would put, "Hello

##recipient_firstname##," if you want the message to address the email recipient directly.

Web Meeting Integration

Enable and configure properties for online meeting, web conferencing and video webinar services for use within Instructor Led Training sessions. The Inquisiq system currently supports integration with GoToMeeting, GoToWebinar, GoToTraining and WebEx. In order to use any of these services, you must have an account with that provider. The **Application Key, Default Organizer Username, Default Organizer Password and Plan** are all obtained from the provider. When creating an Instructor Led Training session, an enabled web meeting service can be selected as the session "Type". For more information, please refer to our API manual at https://acendrelearn.zendesk.com/.

E-Commerce

On this page, you can set up the payment processor to use when customers purchase your courseware through the LMS. The Inquisiq system currently supports two PCI compliant payment gateways: PayPal – Website Payments Standard, and Authorize.net DPM (Direct Post Method). In order to use either of these gateways, you will need to have a merchant account with the provider.

The PayPal payment processor has your users purchase the courseware outside of the LMS UI. Upon clicking "Buy Now", the user is prompted to input any coupon codes that are available. After this window, the user is prompted to complete the purchase in PayPal within one hour. At this point, the user has not been enrolled in the course(s) yet. If they complete the purchase in their PayPal account within one hour, they will be enrolled in the course(s).

Unlike PayPal, the Authorize.net payment gateway accepts payment within the LMS

UI. Once you select the Authorize.net Processing Method from the drop-down menu, the Form Properties tab populates with options. The options that you select in the Form Properties tab will depend on how your Authorize.net account is set up. API Login, Transaction Key, and Public Key are all found in the Settings of your Authorize.net account, when you click "API Credentials & Keys".

Upon clicking "Add to Cart", the course will be added to the user's cart. The user must then go to their cart to apply any coupon codes, add any more courses they wish to purchase, and finally click the "Checkout" button to complete their purchase(s). Once they click "Submit Order", their purchase will be completed, and they will be enrolled in any courses they had in their cart.

Coupon Codes

Coupon codes are used to give discounts to learners who self-enroll in courses. To create a new coupon code, click the "New Coupon Code" link at the top of the page. To update the properties of an existing coupon code, click on the button for the coupon code in the list.

Note: This section only becomes visible when a payment gateway is implemented in the E- Commerce section of the System menu.

Once you have created a coupon code and given it to your learners, they will go to your catalog, and where there is usually an "Enroll" button, there will be an "Add to Cart" link. Once clicked, they will go to their cart, click the "Coupon Code" icon next to the course they wish to discount, and put the coupon code in the pop-up window. If the coupon code is correct and set to apply to the item, the discount will be applied, and the user will be able to click "Checkout" and purchase the item at a discounted rate.

If the coupon code makes the item free, once the coupon code is applied in the user's shopping cart, the item will be immediately removed from the shopping cart and added to their enrollments. They will not need to click the “Checkout” button.

Tracking Codes

Google Analytics or other web traffic analytics solutions can be used with Inquisiq LMS. These tools will give insight into how users navigate through your LMS and what pages are popular. To use these tools, you will first need to set up an account with the solution provider that you prefer (Google Analytics, for instance). These tools will give you tracking codes that can be put in the LMS to enable the analytics tracking to occur.

Once you enter your tracking codes in the box on the Tracking Codes page, Inquisiq will automatically embed your tracking codes on key pages within your LMS, whose traffic will now be tracked by your solution provider. The LMS pages that will contain the tracking code are the Home Page, Catalog pages, and any E-Commerce Checkout pages.

API

An Application Programming Interface (API) is available for Inquisiq. The API allows other software to interact with the Inquisiq software. Note that only specific functionality is supported by the Inquisiq API. For more information, please refer to our API manual at https://acendrelearn.zendesk.com/.

xAPI Endpoints

Inquisiq provides the ability to set up xAPI endpoints to record data to the Learning Record Store (LRS) from content accessed outside of the Inquisiq LMS. You can generate a key for each piece of your content, or one key for all your content, depending on how many people or sources require permission to record data to the

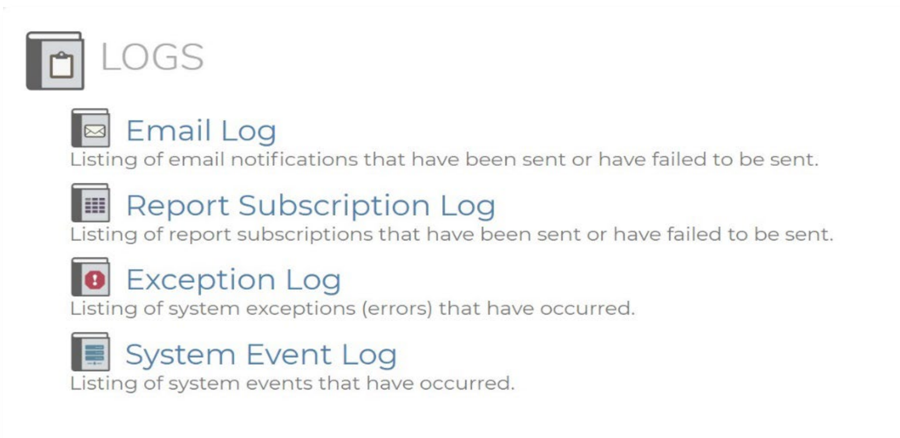
LRS, and how you want that authentication distributed.

If you only need one authentication key for everyone accessing content outside of the LMS to be recorded to the LRS, you only need to generate one key. If you would prefer that everyone accessing the content have their own authentication key, you would generate keys for everyone.

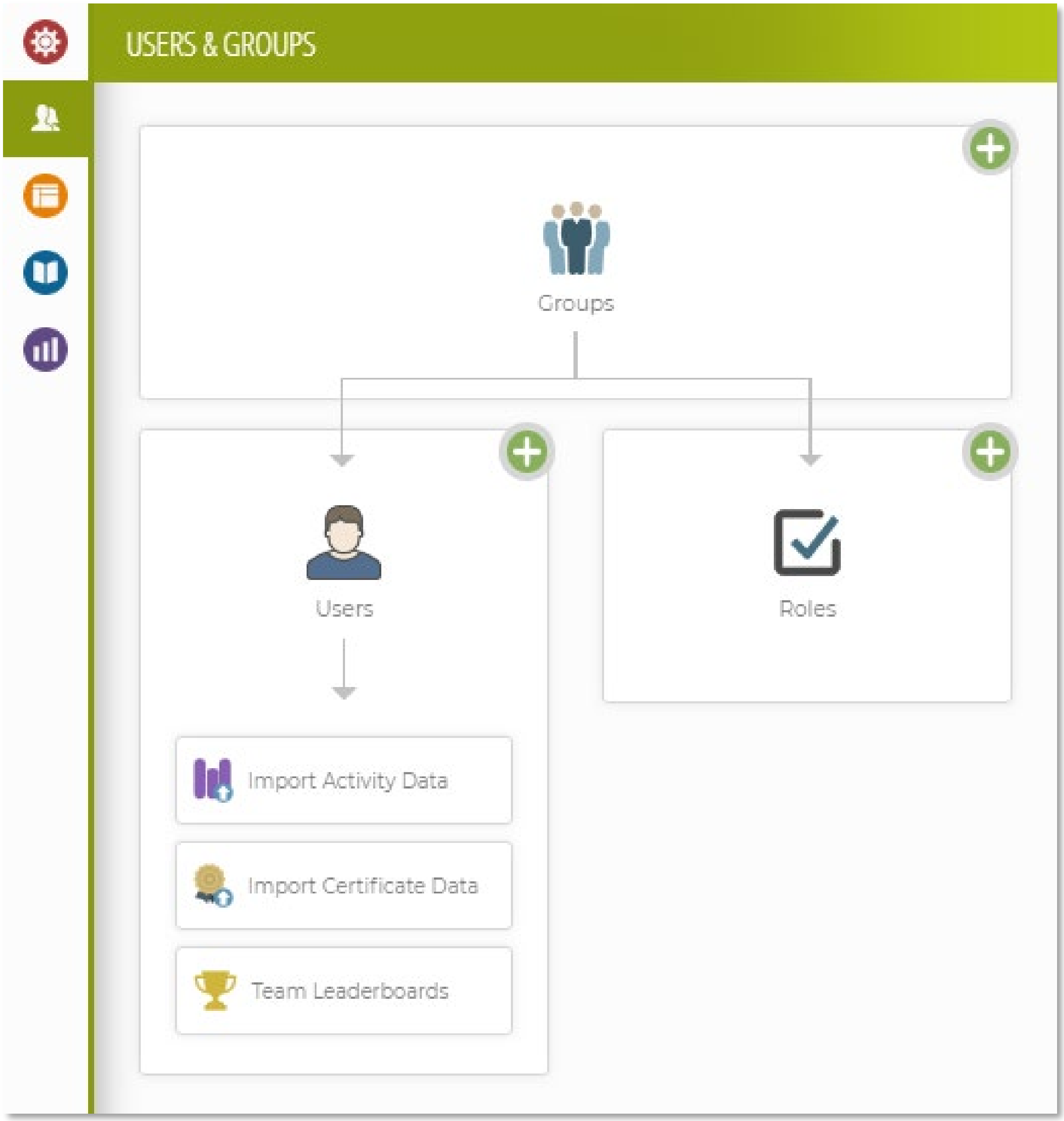
Click on "Generate Key" to create a new key. To update the label name for the key or deactivate it, click on the button for the key in the list.

Logs

The system records data about certain events that occur are accessible on this page.



Users & Groups



Groups

New Group

Clicking the ⊕ button on the top right corner of the Groups box in the Users & Groups menu performs the same functionality as clicking “New Group” from the Groups page.

Name – Visible in the “Communities” section of the Catalog (if “Self Join” is checked); not visible in the user’s profile if “Publicize Membership” is not checked (must be checked if “Self Join” is checked as well).

Avatar – Visible in the “Communities” section of the Catalog (if “Self Join” is checked).

Self Join – Allows or prevents users to join themselves to the group from the “Communities” section of the Catalog (forces “Publicize Membership” to be checked). If this option is disabled, the group will not show up in the “Communities” section of the Catalog.

Publicize Membership – Shows or hides membership to group in user profiles.

Discussion – Enables or disables a discussion board for the group. If discussion moderation is enabled, when posts are made to the discussion board by group members, they must be approved before they can be displayed (see section below).

Short Description – Plain text only box for a brief description of the group.

Note: This field has a 512-character limit. If you need graphics or need to go into more detail about the group, use the Description WYSIWYG box.

Search Tags – Any words you would like associated with the group for users to be able to search for it in the search bar on the Groups page.

Note: Any part of the Short Description can also be used when searching for a group.

Modify Group

For each group listed in “Groups”, there are buttons you can click to modify the group:

- Group Properties
- Auto-Join Rules
- Enrollments
- Documents

To view more information and modification options for an existing group, click on the name of the group in the list.

Dashboard – View a summary of the group’s information and enrollments. You can also adddocuments or create auto-join rules for the group from the shortcuts listed under “Actions”.

Group Properties – All properties from the New Group page, with a Group Members tab, where you can manage the list of members in the group.

Auto-Join Rules – Click "New Ruleset" to set rules that automatically put new users into the group based on the criteria in the ruleset. To update the properties of an existing ruleset, click on the name of the ruleset in the list.

Enrollments – Manage any enrollments assigned to the group. Do not create group enrollments here. Instead, create an enrollment from the Course Modification page, and on the enrollment's page, in the Rulesets tab, create a ruleset that auto-enrolls members of the group. To update the properties of an existing enrollment, click on the name of the enrollment in the list.

Private Catalog Access – Give groups access to private catalogs.

Roles – All members of a group can be assigned a role(s).

Discussion – Group's Message Feed and list of Moderators. If "Discussion Moderation" is enabled in Group Properties, posts must be approved by either the Administrator (non-user), a user in a role with the Group Manager permission for that group, or one of the group's Moderators. Posts not yet approved or denied appear in the Message Feed tab of the Discussion section of the group's Modify page.

Documents – Upload documents accessible only to group members and organize them within document folders. To update the properties of an existing document, click on the name of the document in the list.

Users

All users in your portal are listed here. Use the "User Batch" to import more than one user into the system. Use "New User" to create a singular new user in the system. Use "Merge User Accounts" to merge the properties of two user accounts.

Clicking the button on the top right corner of the Users box in the Users &

Groups menu performs the same functionality as clicking "User Batch" or "New User" from the Users page.

New User

The fields in this form are dictated by the options you checked under the "Admin View" column in the Data Fields tab of the User Field Configuration settings.

User Batch

Use the table on this page as a reference to create a spreadsheet with the information about the users you wish to import. You will then export the spreadsheet as a tab-delimited text file (from Excel on a PC), a Windows Formatted Text file (from Excel on a Mac), or a Tab-separated values (.tsv) file, which upon downloading, you will then change the extension to .txt (from Google Sheets on a PC or Mac).

A few things to keep in mind when performing a User Batch:

- If there is data the system cannot read in one or more of the fields (for example, "Must Change Password" field has "True" or "False" rather than the required "1" or "0"), the upload will fail.
- If there is a space, tab, or enter in the tab-delimited file after the very last "END," the upload will fail.
- If you are updating one or more user accounts rather than creating new ones, the system matches the existing user data based solely on the username. Make sure that the username is correct for users you wish to update through a batch upload.
- When updating existing user data, any fields left blank in the spreadsheet will clear those data fields in the user profile in the system if they were filled out. Be sure to include all needed/relevant profile data in the batch upload, even if that data is already in the user's profile in the system.

Merge User Accounts

To merge two user accounts, first select the source user account by searching for the user or clicking on the user's name from the list and then select the destination user account. All associated objects and user properties will be copied to the destination user account, and the source user account will be deleted.

Modify User

For each user listed in "Users", there are buttons you can click to modify the user:

- User Profile
- Impersonate
- Groups
- Roles
- Enrollments

To view more information and modification options for an existing user, click on the name of the user in the list.

Dashboard – View a summary of the user's information, enrollments, stats and activity. You can also create new enrollments for the user from the shortcuts listed under "Actions".

User Profile – All properties from the New User page, with a Files tab (if enabled in the User Field Configuration settings) where the user can upload and view their files.

Enrollments – Manage any enrollments assigned to the user. You cannot create recurring enrollments here. Instead, create an enrollment from the Course Modification page, and on the enrollment's page, in the Rulesets tab, create a ruleset that auto-enrolls this user, or users with certain parameters, to the course.

Certifications – Join user to or delete certifications.

Groups – Add or remove the user to or from one or more groups.

Certificates – Award and manage user certificates.

Transcript – History of completed courses, Learning Paths, and Instructor Led Trainings. To print the records in the selected tab or print all records, click the printer symbol.

Import Activity Data – see section below

Import Certificate Data – see section below

Roles – Manage user roles. Use the "Display Effective Permissions" link to see what permissions the user has based on their role(s).

Calendar – Opens a calendar window with icons indicating course and Instructor Led Training sessions.

Impersonate – Logs you in as the user.

Import Activity Data

Inquisiq allows you to import historic course completion data for users who have taken courses outside of the Inquisiq LMS. This information can be imported and displayed on user transcripts and in reports.

Use the table on this page as a reference to create a spreadsheet with information about the users you wish to import. You will then export the spreadsheet as a tab-delimited text file (from Excel on a PC), a Windows Formatted Text file (from Excel on a Mac), or a Tab-separated values (.tsv) file, which upon downloading, you will then change the extension to .txt (from Google Sheets on a PC or Mac).

A few things to keep in mind when Importing Activity Data:

- If there is data the system cannot read in one or more of the fields (for example, “Module Success” field has “Pass” or “Fail” rather than the required “Passed” or “Failed”), the upload will fail.
- If there is a space, tab, or enter in the tab-delimited file after the last “END,” the upload will fail.
- If the username does not already exist in the system, the upload will fail. The user needs to be in the system before activity data can be imported.
- If there is a course in the system that matches a course code in the activity import document, the user’s transcript will reflect that course’s information. If the course code in an activity import document matches to one in the system, and the course title is different in the activity import document from that which is already in the system, the system will not import the course title from the document and will instead attribute the user’s activity to the course in the system.

Note: There is a link in each individual user profile to Import Activity Data. Both the page here and the link in each user profile serve the same purpose. There is no difference between either and it does not matter on which page you perform the upload. The data will be imported the same way.

Import Certificate Data

Inquisiq allows you to import historic certificate data for users who have earned certifications outside of the Inquisiq LMS. This information can be imported and displayed on user transcripts and in reports.

Use the table on this page as a reference to create a spreadsheet with all of the information about the users you wish to import. You will then export the spreadsheet as a tab-delimited text file (from Excel on a PC), a Windows Formatted Text file (from Excel on a Mac), or a Tab-separated values (.tsv) file, which upon downloading, you will then change the extension to .txt (from Google Sheets on a PC or Mac). A few things to keep in mind when Importing Certificate Data:

- If there is data the system cannot read in one or more of the fields (for example, “Certificate Award Date” field is not in the correct Date/Time format specified in the table on the page), the upload will fail.
- If there is a space, tab, or enter in the tab-delimited file after the very last “END,” the upload will fail.

Note: There is a link in each individual user profile for Import Certificate Data. Both the page here and the link in each user profile serve the same purpose. There is no difference between either and it does not matter on which page you perform the upload. The data will be imported the same way.

Team Leaderboards

Users’ rankings, names, and scores are listed here, in the order specified in the drop-down at the top of the page (each option in the drop-down enabled under the Leaderboards tab in Configuration).

Note: If the boxes in Configuration under the Leaderboards tab are unchecked, the

Leaderboards section will not appear under Users & Groups.

Roles

Roles grant certain permissions to users. You can create different roles with different sets of permissions. Users can have more than one role assigned to them.

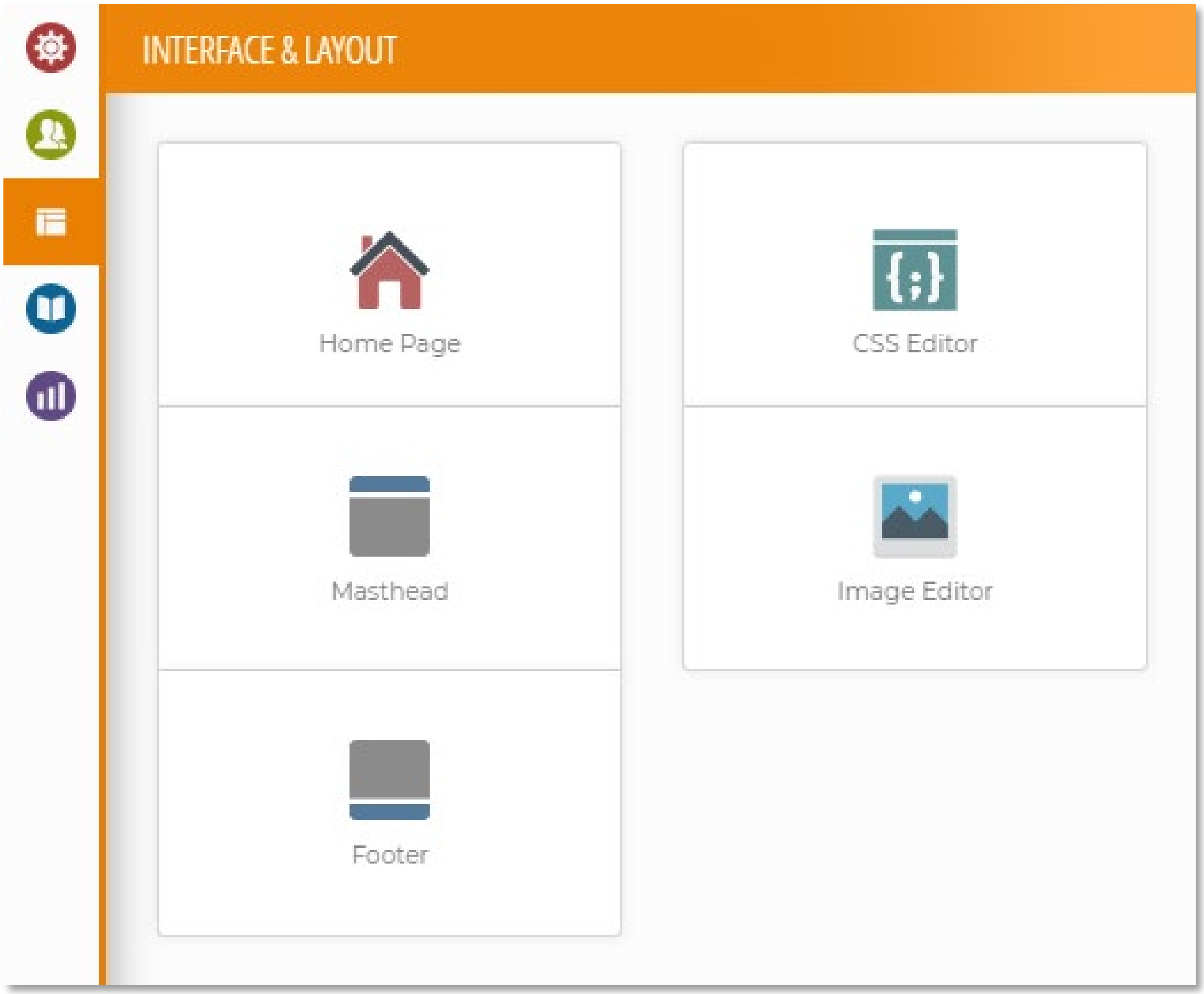
Role permissions are broken up into sections according to the Administrator Widgets that each permission gives the user access to. If a user is assigned a role that has even a single permission checked under that Widget's section, the user will be able to see that Widget on the left side of the LMS. They will only be able to see the section(s) within that Widget that their permissions allow/require. Roles may have as many permissions checked as desired, from any of the different Widget sections. Users may be granted an unlimited number of roles.

The role of System Administrator cannot be deleted, and its permissions cannot be limited nor altered (System Administrator has all permissions). The role can be assigned to any number of users.

Note: The Administrator is not a user, nor a role (not to be confused with the System Administrator). The Administrator's information is found in System > Account Settings. The Administrator does not have access to Learner Widgets, while a user with the System Administrator role does have access to Learner Widgets. Also note that the Administrator cannot create report subscriptions.

Clicking the button on the top right corner of the Roles box in the "Users & Groups" menu performs the same functionality as clicking "New Role" from the Roles page. To view more information and modification options for an existing role, click on the name of the role in the list.

Interface & Layout



Home Page

Use the WYSIWYG editor to modify the home page of your portal.

Masthead

Use this section to upload your own branding images and backgrounds in the Masthead (the very top menu bar with My Dashboard, Message Center, and Catalog in it). The Home Page tab allows you to change the appearance of your Masthead as it appears on a computer screen. The Application tab allows you to change the appearance of your system as it appears on mobile devices.

Footer

List your company name, email, and website here. Any other information or customization you would like to include in the Footer must be managed through the CSS Editor.

CSS Editor

Here you can go even deeper into customizing the LMS look and feel by editing the CSS of the individual LMS pages. Make sure to test your modifications on as many different browser versions as possible, since necessary parts of the page can be inadvertently obscured on one browser but not another. We recommend that only those who are very familiar with CSS use this feature.

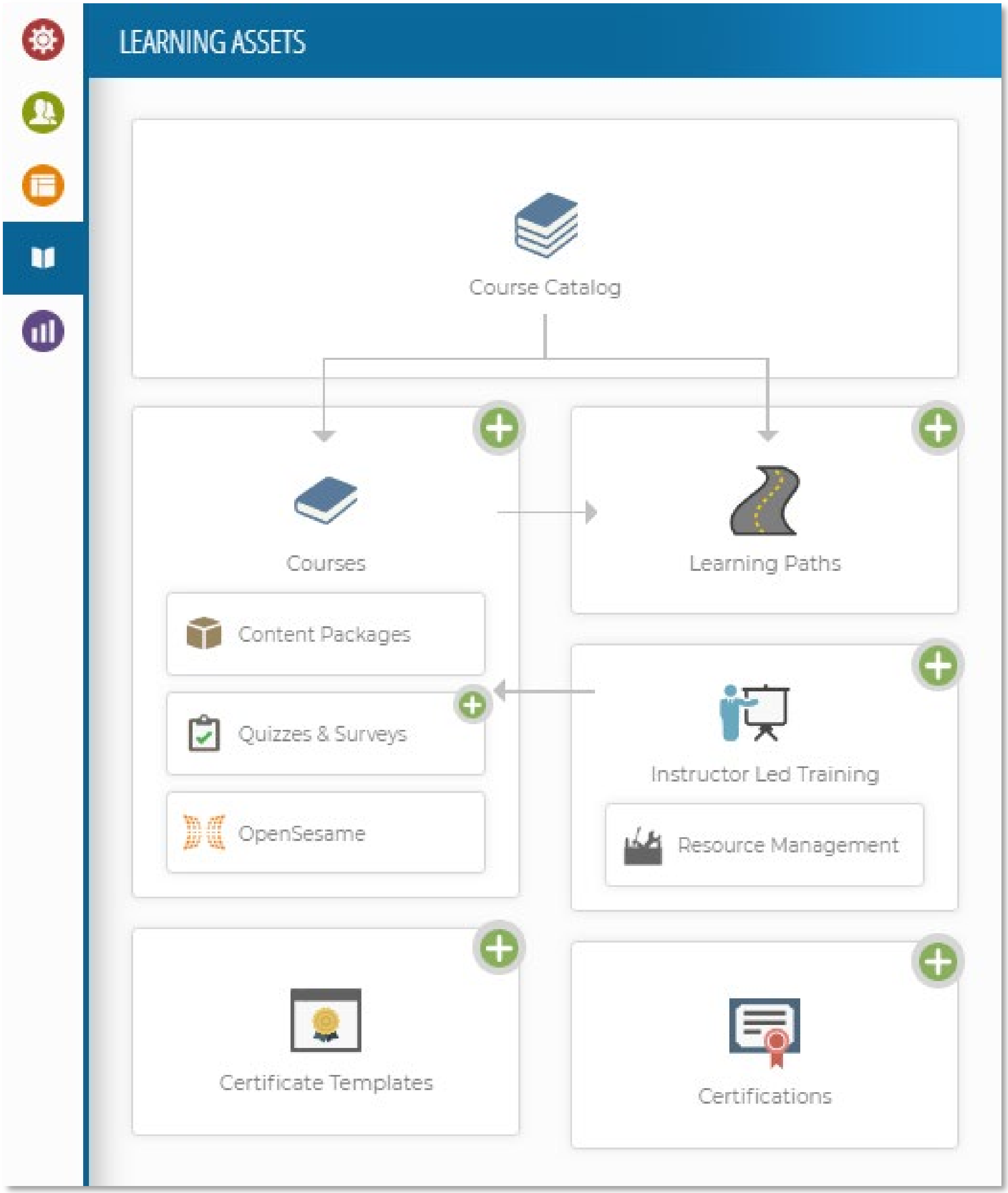
To get rid of any and all changes that you have made, click “Revert to Default”.

Image Editor

All images used in the system (buttons, icons, any graphic you see on your pages) can be swapped out for your own images and icons here. Use the file system on the left to search through and find the icon or button that you are looking to change. Click on the icon png, then click “Choose File” to upload the image that you wish to replace the graphic with. Don’t forget to click “Save Changes”.

You can revert to the original graphic any time by clicking the “Revert to Default” link.

Learning Assets



Inquisiq LMS was designed with the intent to have all course, catalog, and enrollment creation and management occur within this menu.

Course Catalog

Create, delete, and add courses to your catalogs here. You can click and drag your courses and catalogs to change the order in which they are displayed in the Catalog. Catalogs will appear under the “Catalogs” heading, and stand-alone courses not in a specified catalog will be displayed under the “Courses” heading on the main Catalog page.

If you have a course within a catalog selected, and you click “Delete This Catalog”, you will delete the catalog that the course resides in. To remove a course from a catalog, select the course and click “Remove Course from Catalog”.

If you select “Course Catalog” at the top of the list and click “Delete This Catalog”, all catalogs that you have created will be deleted. The main “Course Catalog” cannot be deleted or renamed.

To place a new catalog within another catalog, select the catalog, click “New Catalog”, and create the new catalog. It will appear under the “Catalogs” heading above the “Courses” section within the original catalog. Sub-catalogs cannot be moved into another catalog. They must be deleted and re- created within the new catalog.

Courses

Clicking the  button on the top right corner of the Courses box in the “Learning Assets” menu performs the same functionality as clicking “New Course” from the Courses page.

New Course

Properties Tab

Revision Code – Created upon completion of course creation. For internal tracking purposes only.

Code – Use course codes to simplify course data management, including running reports, as well as importing user activity data.

Title – The title of the course. Users can see this title.

Catalog Shortcode – Giving a course a catalog shortcode generates a unique link to the course as viewed from the Catalog. This link will be in the following format, with {portal name} replaced with your portal hostname and {catalog shortcode} replaced with your chosen shortcode.

https://{portal name}.inquisiq.com/catalog/?type=course&sc={catalog shortcode}

Credits – Number of credits a learner earns upon completion of the course with a passing score.

Cost – Charge users to self-enroll in the Learning Path if you have a payment gateway set up in E-Commerce.

Avatar – Appears as the background for the course tile in the Catalog, and as an icon next to the course title on the course enrollment page.

Estimated Length – Gives users an idea of how long a course takes to complete. This does not affect any course parameters; it is just meant to be an estimate/guideline for the user.

Short Description – Plain text only box for a brief description of the course. If you need graphics or need to go into more detail about the course, use the Description WYSIWYG box, or the Objectives WYSIWYG box.

Search Tags – Any words you would like to be associated with the course for your users to be able to search for it in the search bar on the Catalog page. The search bar only pulls search results based on course Code, Title, and Search Tags, so put any keywords from any of the Description boxes that you want your learners to be able to search for in the Search Tags box.

Settings Tab

Rating – Allow users to rate the course (one to five stars).

Discussion – Enable users to post comments on a discussion board linked to the course. Only the Administrator (non-user) and any users in a role with the Course Manager permission for the course may manage posts made to the course's discussion board.

If the box for discussion moderation is checked, the Administrator (non-user) and any users in a role with the Course Manager permission for the course must approve or deny posts to the discussion board. If the box for discussion moderation is not checked, posts will not need approval to be posted.

If the box for allowing users who are not enrolled in the course to view the discussion is checked, any logged-in user will be able to view and post to the discussion board. If the box is not checked, only learners who are enrolled in the course will be able to view and post to the discussion board.

Module Ordering – Determines whether the modules need to be completed in a specific order.

Published – When published, a course is visible and able to be enrolled in by users. Exceptions to this include if the course is put in a private catalog in the Course Catalog section, or if the course is removed from all catalogs entirely in the Course Catalog section. When unpublished, a course is not visible, and users are not able to enroll themselves in the course. The Administrator (non-user) and users with certain privileges may still enroll users into an unpublished course.

Closed – When closed and published, a course is visible to users, but users are unable to enroll in the course, and where the “Enroll” link would be, there is a graphic indicating that the course is closed, and a lock icon appears in the top right corner of the course tile. The Administrator (non-user) and users with certain privileges may still enroll users into a closed course.

Locked – When locked, a course is automatically closed, neither the Administrator (non- user) nor users with privileges may enroll users into the course, any users currently viewing the course will be kicked out, and any users currently enrolled in the course will be unable to launch the course.

Self-Enrollment Due – If users enroll themselves in the course, they have this amount of time to complete the course. If they do not complete the course by the due date, the course will be moved to a section of their enrollments marked “Overdue” (if their access time runs past the due date; see below).

Self-Enrollment Access from Start and Self-Enrollment Access from First Launch both control the same parameter. This parameter controls when the user loses access to the course. Whichever date comes the earliest is the date on which the learner loses access to the course.

Note: Due date does not affect course access. If a user completes a course before the due date, they will continue to have access to the course up through the Access from Start or Access from First Launch date (whichever comes first). If a user does not complete a course before the due date, the course will be moved to a section of their enrollments marked “Overdue,” and they (cont.) will have access to the course up through the Access from Start or Access from First Launch date (whichever comes first).

Self-Enrollment Approval – If enabled, the enrollments of users who self-enroll in the course must first be approved by an administrator.
Social Media – Add social media links to be displayed when the course is viewed in the Catalog.

Prerequisites – Users will need to complete the prerequisites that you select in order to be able to self-enroll in the course. If you select “Any single course listed below”, they will only need to complete one of the courses you select in order to be able to self-enroll in the course. If you select “All courses listed below”, they will need to complete the courses you select.

Note: These prerequisites do not apply to users enrolled into this course by admins or users with permissions that allow them to enroll users into the course. Prerequisites for these enrollments are set up in the individual enrollment set up.

Personnel Tab

Experts – Course experts can grade and/or mark complete On-the-Job Training modules and Task modules, if the box allowing them to do so is checked under the content package in the Content tab in the module. Their name and email address will appear under “Experts” on the course’s main page.

Enrollment Approvers – Course enrollment approvers can approve or deny enrollment requests made by users who self-enroll in the course. If enabled, course experts and/or user supervisors can be allowed to approve enrollments.

Sample Screens Tab

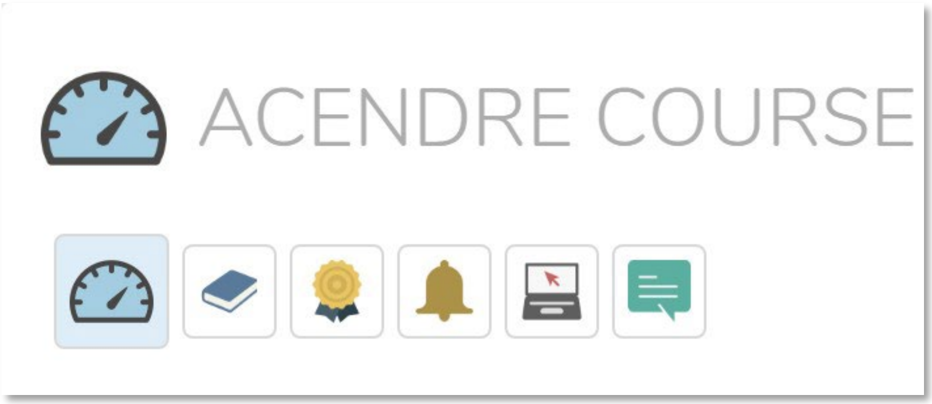
If you would like to show learners what a course will look like, you can include images of your content, or other images that will represent what your course will be covering.

Modify Course

For each course listed in "Courses", there are buttons you can click to modify the course:

- Publish/Unpublish Course
- Open/Close Course
- Course Properties
- Enrollments

To view more information and modification options for an existing course, click on the name of the course in the list.



Dashboard – View a summary of the course's information, enrollments and stats. You can also create new modules, course material, certificates, email notifications and enrollments for the course from the shortcuts listed under "Actions".

Course Properties – View and modify course properties, settings, personnel and sample screens set during course creation (see above).

Modules Tab

Create, edit, and delete individual modules within a course. Attach content to new modules under the Content tab, by selecting the kind of content you want the module to display (content package aka SCORM, Instructor Led Training, Task, and/or OJT), and then choosing the content packages to attach to the module. The list of content packages you choose from is pulled from the Content Packages section of the Learning Assets menu, where you would upload your content packages before creating your courses.

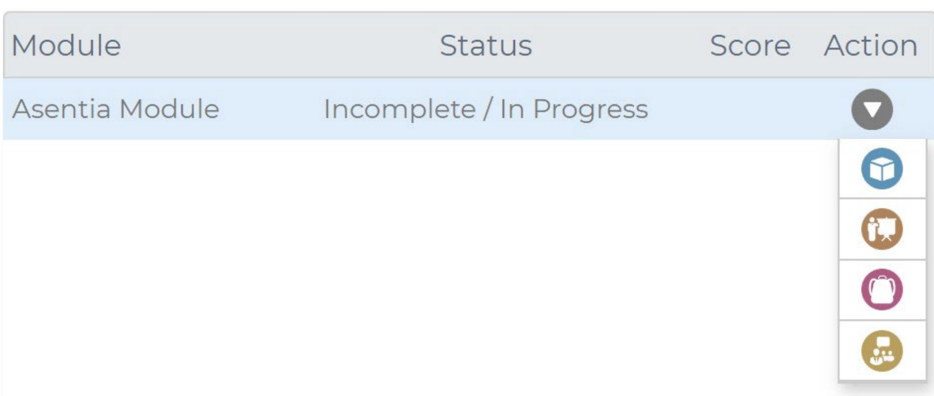
Content Package – Select a SCORM package from the Content Packages section.

Instructor Led Training Module – Select an Instructor Led Training module from the Instructor Led Training section.

Task – Upload a document for users to fill out/follow directions from, and then upload a response to be assessed by the Administrator (non-user), Supervisors (if "Allow learner's supervisors to grade and/or mark this task as completed" is checked) and/or Experts (if "Allow experts for this course to grade and/or mark this task as completed" is checked).

OJT – OJT stands for "On-the-Job Training". This type of module can be used by instructors for training users one-on-one or allowing users to demonstrate their ability to apply the skills that they have learned. This type of module contains content that is completed by the Administrator (non-user), user's Supervisor, or course Expert (depending on whether "Proctor" boxes are checked) rather than the user. OJT modules are completed from the OJT Proctoring Widget on My Dashboard. The Administrator (non-user), Supervisor, or Expert clicks the "View" icon to view the module content and completes the content in order to give the user a "Completed" status.

Note: You can give the learner options of what activity they would like to complete within a module by selecting more than one content type under a module's Content tab. When the learner launches the Course, the module will have a down arrow icon where the action/launch button usually is, and a drop-down will appear with the content types that were selected (see screenshot). The learner will only be able to complete one of the activities in order to pass the module.



Course Materials Tab

Course Materials are documents that you can upload for a course, which will be listed on the course enrollment page and able to be downloaded by all users, or only enrolled users, depending on the material's settings. To update the properties of existing course material, click on the name of the course material in the list. Clicking the button for a course material in the list makes it either private or public.

Certificates – Users who complete this course will be awarded any certificates in this section. You can either create a new certificate or build a certificate based on a certificate template, found in the Certificate Templates section of the Learning Assets menu.

New Certificate

Name - The name of the certificate. Recipients can see this name in their account if they receive the certificate.

Issuing Organization – You can include in the certificate data where or which organization the recipient got the certificate from.

Credits – Indicate how many credits this certificate is worth. Note that Course Credits and Certificate Credits are separate, and never totaled together.

Code – Assign the certificate a code for your own internal tracking purposes, as well as for the Import Certificate Data function.

Status – If this box is unchecked, the certificate will not be awarded upon course completion.

Award – Whether or not this box is checked controls how the certificate is awarded if a user re-takes and passes the course again.

Checked – The certificate's award date will reflect the date that the course was most recently completed and passed.

Un-checked – The award date will reflect the first time that the course was completed and passed before the certificate expired. If the course is re-taken and re- passed before the certificate's expiration date, the award date will be the date upon which the course was first passed. If the course is re-taken and re-passed after the certificate's expiration date, the award date will reflect the date upon which the course was re-taken and re-passed.

Expiration – The certificate will be revoked upon the date of expiration, if there is one.

Description – Use the WYSIWYG box to describe the certificate (its significance, what it means, etc).

In the Certificate Builder tab, you can modify the appearance of the certificate.

To change the certificate's image, click "Upload Background Image".

Click the red "Menu" button, and type text into the "Static Label" box, and then click "Add" when you want to put it somewhere on the certificate. Click and drag the “Data Fields” to have data fields pulled from the recipient’s profile when they are awarded the certificate.

Email Notifications – Set up email notifications related to events linked to this specific course here. These notifications function just like those found in the Email Notifications section of the System menu, however when created from the course page, the notifications only pertain to events related to the course.

Note: The system prioritizes course email notifications over system email notifications. If there is an email notification in the system and one in a course’s settings that both trigger upon the same event (i.e. course enrollment, course completion, etc), the system will ONLY send the course email notification.

Enrollments – The LMS is set up in a way that prefers that enrollments be created here, rather than in the user profile, or in a group. Rulesets are used to auto-enroll users during the enrollment Lifespan period (the Rulesets tab appears once the Properties tab for the enrollment is correctly filled out and saved).

New One-Time w/Fixed Dates

Utilize this type of enrollment when you want all enrolled users to take the course once, and within the same date range.

Label – Internal label for the enrollment for internal tracking purposes. Only the Administrator (non-user) and any users with permissions to see and/or create enrollments for the course will see this label. Learners will not see this label; they will only see the course name.

Prerequisites – If checked, users will not be able to launch the course until the courses listed in the Prerequisites tab of the Course Properties section are completed (depending on what is marked in the Prerequisites tab in the course’s Course Properties section, learners will either need to complete “Any single course listed" or "All courses listed" in the course's Prerequisites list).

Force Assignment – If this is checked, and the user matches the ruleset criteria during the Lifespan of the enrollment, the user will be auto-enrolled in the course regardless of if they took the course previously in a one-time enrollment. If this is un-checked, users who match ruleset criteria during the Lifespan of the enrollment will not be auto-enrolled in the course if they already took the course previously in a one-time enrollment.

Lifespan Start and Lifespan End dictate the timeframe within which users who match enrollment ruleset criteria will be enrolled. Before and/or after that timespan (if the Lifespan Start does not begin immediately, and/or the Lifespan End is not infinite), nobody will be auto-enrolled into the course.

Lifespan Timezone – The time zone within which the course is taking place. The course enrollment times will reflect differently for user profiles set to different time zones, relative to the enrollment's Lifespan Timezone. The default time zone for the enrollment is that which is set in the Account Settings section of the System menu.

Due – This is the date on which the course must be completed by the user. "Access from First Launch" must run past the due date, so the course will still be accessible to the user after the due date; it will appear under the "Overdue" tab of their Enrollments Widget. If they do complete the course past the due date, their completion will be noted as overdue.

Access from First Launch – This parameter controls when the user loses access to the course. The course will be moved to the "Expired" section of the user's Enrollments Widget, the user will not be able to launch it, and it will remain in the "Expired" section for 30 days before it is completely removed.

New One-Time w/Relative Dates

Utilize this type of enrollment when you want all enrolled users to take the course once, but each user's date range within which they can take the course is dependent on when they are enrolled, rather than the same for every user.

Label – Internal label for the enrollment for internal tracking purposes. Only the Administrator (non-user) and any users with permissions to see and/or create enrollments for the course will see this label. Learners will not see this label; they will only see the course name.

Prerequisites – If checked, users will not be able to launch the course until the courses listed in the Prerequisites tab of the Course Properties section are completed (depending on what is marked in the Prerequisites tab in the course's Course Properties section, learners will either need to complete "Any single course listed" or "All courses listed" in the course's Prerequisites list).

Force Assignment – If this is checked, and the user matches the ruleset criteria during the Lifespan of the enrollment, the user will be auto-enrolled in the course regardless of if they took the course previously in a one-time enrollment. If this is un-checked, users who match ruleset criteria during the Lifespan of the enrollment will not be auto-enrolled in the course if they already took the course previously in a one-time enrollment.

Lifespan Start and Lifespan End dictate the timeframe within which users who match enrollment ruleset criteria will be enrolled. Before and/or after that timespan (if the Lifespan Start does not begin immediately, and/or the Lifespan End is not infinite), nobody will be auto-enrolled into the course.

Lifespan Timezone – The time zone within which the course is taking place. The course enrollment times will reflect differently for user profiles set to different time zones, relative to the enrollment's Lifespan Timezone. The default time zone for the enrollment is that which is set in the Account

Settings section of the System menu.

Delay – If a user meets the ruleset criteria, they will be enrolled in the course this amount of time after they meet the criteria. If there is no delay, they will be enrolled right when they meet the criteria.

Due – This is the date on which the course must be completed by the user. “Access from First Launch” must run past the due date, so the course will still be accessible to the user after the due date; it will appear under the “Overdue” tab of their Enrollments Widget. If they do complete the course past the due date, their completion will be noted as overdue.

Access from Start and Access from First Launch both control the same parameter. This parameter controls when the user loses access to the course. Whichever date comes the earliest is the date on which the learner loses access to the course. The course will be moved to the “Expired” section of the user’s Enrollments Widget, the user will not be able to launch it, and it will remain in the “Expired” section for 30 days before it is completely removed.

New Recurring w/Fixed Dates

Utilize this type of enrollment when you want all enrolled users to take the course on a periodic basis, and within the same date range.

Label – Internal label for the enrollment for internal tracking purposes. Only the Administrator (non-user) and any users with permissions to see and/or create enrollments for the course will see this label. Learners will not see this label; they will only see the course name.

Prerequisites – If checked, users will not be able to launch the course until the courses listed in the Prerequisites tab of the Course Properties section are completed (depending on what is marked in the Prerequisites tab in the course's Course Properties section, learners will either need to complete "Any single course listed" or "All courses listed" in the course's Prerequisites list).

Lifespan Start and Lifespan End dictate the timeframe within which users who match enrollment ruleset criteria will be enrolled. Before and/or after that timespan (if the Lifespan Start does not begin immediately, and/or the Lifespan End is not infinite), nobody will be auto-enrolled into the course.

Lifespan Timezone – The time zone within which the course is taking place. The course enrollment times will reflect differently for user profiles set to different time zones, relative to the enrollment's Lifespan Timezone. The default time zone for the enrollment is that which is set in the Account Settings section of the System menu.

Due – This is the date on which the course must be completed by the user. "Access from First Launch" must run past the due date, so the course will still be accessible to the user after the due date; it will appear under the "Overdue" tab of their Enrollments Widget. If they do complete the course past the due date, their completion will be noted as overdue.

Recurrence – The user will be re-enrolled in the course as often as dictated here. An end date cannot be set for this parameter. Recurring enrollments recur until the enrollment is deleted.

Access from Start and Access from First Launch both control the same parameter. This parameter controls when the user loses access to the course. Whichever date comes the earliest is the date on which the learner loses access to the course. The course will be moved to the "Expired" section of the user's Enrollments Widget, the user will not be able to launch it, and it will remain in the "Expired" section for 30 days before it is completely removed.

New Recurring w/Relative Dates

Utilize this type of enrollment when you want all enrolled users to take the course on a periodic basis, but each user's date range within which they can take the course each period is dependent on when they are enrolled, rather than the same for every user.

Label – Internal label for the enrollment for internal tracking purposes. Only the Administrator (non-user) and any users with permissions to see and/or create enrollments for the course will see this label. Learners will not see this label; they will only see the course name.

Prerequisites – If checked, users will not be able to launch the course until the courses listed in the Prerequisites tab of the Course Properties section are completed (depending on what is marked in the Prerequisites tab in the course's Course Properties section, learners will either need to complete "Any single course listed" or "All courses listed" in the course's Prerequisites list).

Lifespan Start and Lifespan End dictate the timeframe within which users who match enrollment ruleset criteria will be enrolled. Before and/or after that timespan (if the Lifespan Start does not begin immediately, and/or the Lifespan End is not infinite), nobody will be auto-enrolled into the course.

Lifespan Timezone – The time zone within which the course is taking place. The course enrollment times will reflect differently for user profiles set to different time zones, relative to the enrollment's Lifespan Timezone. The default time zone for the enrollment is that which is set in the Account Settings section of the System menu.

Delay – If a user meets the ruleset criteria, they will be enrolled in the course this amount of time after they meet the criteria. If there is no delay, they will be enrolled right when they meet the criteria.

Due – This is the date on which the course must be completed by the user.

“Access from First Launch” must run past the due date, so the course will still be accessible to the user after the due date; it will appear under the “Overdue” tab of their Enrollments Widget. If they do complete the course past the due date, their completion will be noted as overdue.

Recurrence – The user will be re-enrolled in the course as often as dictated here. An end date cannot be set for this parameter. Recurring enrollments recur until the enrollment is deleted.

Access from Start and Access from First Launch both control the same parameter. This parameter controls when the user loses access to the course. Whichever date comes the earliest is the date on which the learner loses access to the course. The course will be moved to the “Expired” section of the user’s Enrollments Widget, the user will not be able to launch it, and it will remain in the “Expired” section for 30 days before it is completely removed.

Modify Enrollment

To update the properties of an existing enrollment, click on the name of the enrollment in the list.

Click “New Ruleset” in the Rulesets tab to set rules that automatically enroll users into the course based on the criteria in the Ruleset. To update the properties of an existing ruleset, click on the name of the ruleset in the list.

Discussion – View the discussion board for the course (if it is enabled in the [Course Settings](#) tab).

Content Packages

All course content is uploaded and stored in the Content Packages section, and courses are created from this content. Our content section accepts SCORM packages (through the “Upload Package” function), videos in mp4, ogv, and webm format (through the “Import Video” function), PowerPoint presentations (through the “Import PowerPoint” function), and PDFs (through the “Import PDF” function).

To update the properties of an existing content package, click on the name of the content package in the list. To create a course from a content package, click “Import This Package” at the top of the modification page for that specific content package. This will create a course in the Courses section.

Note: If the package import fails, it is usually either because the package is larger than 2GB (our file size limit), or there is an issue with the manifest file in the SCORM package. Be sure that the name of the package does not have any special characters in it, nor are there any special characters in the <title></title> line of the manifest file.

Quizzes & Surveys

Inquisiq provides a quiz and survey authoring tool for those who wish to create a quick quiz or survey, either as a standalone session to be displayed on the Catalog page, or to be attached to a module within a course.

Clicking the button on the top right corner of the Quizzes & Surveys box performs the same functionality as clicking “New Quiz/Survey” from the Quizzes & Surveys page.

The “Identifier” will be the name of the SCORM package as it will appear in the Content Packages section. The “Title” will appear to users when they take the quiz or survey.

Once you fill out the properties for a new quiz or survey, click “Create Quiz/Survey” to save it as a draft, or click “Create and Publish Quiz/Survey” to turn the quiz or survey into a content package and send the package created to the Content Packages section. To turn the Quiz or Survey into a stand- alone course, go to the Content Packages section, click on the name of the content package you created when you published the quiz or survey, and then click the "Import this Package" link at the top of the page. This will create a new course, which will pull its name from the Title of the quiz or survey.

To use the quiz or survey in an already existing course, go to the Courses section, click on a course name and click "Create a new module" under the Actions section. In the "Content" tab, check the box next to "Content Package", then click "Select Content Package". Select the content package that contains the quiz or survey that you created, click "Select Content Package", and then at the bottom of the page, click "Create Module".

OpenSesame

The OpenSesame course catalog can be used to purchase individual courses and course bundles from a variety of publishers to import into your Content Packages. Courses can be browsed by category (i.e. Business Skills, Safety, Compliance, Technology, Industry Specific and Certifications) or searched for by name or topic. You can choose to purchase a certain number of seats or pay a fixed rate per seat.

After purchasing the course content, click "Send to LMS" from the "My Courses" page within the OpenSesame Marketplace. The purchased content will be synchronized and uploaded to your content package repository, which you can access from the "Content Packages" page. You can then import, configure and utilize the content right away.

Instructor Led Training

New Instructor Led Training Module

Clicking the ⊕ button on the top right corner of the Instructor Led Training box performs the same functionality as clicking “New Instructor Led Training Module” from the Instructor Led Training Modules page.

Title – The name of the module.

Avatar – You can attach an image to the module, which will be set as the background of the course tile in the Catalog (if the module is available as a stand-alone course), as well as in other areas.

Cost – Only charged if the course is available as a stand-alone course, and the user self-enrolls.

Description – Appears on the page for the stand-alone course (if available), as well as the pop-up window when the module is launched in a course.

Search Tags – In the Catalog search bar, when these terms are entered, the course will come up.

Standalone Enrollment – When checked alone, users can see the Instructor Led Training module as an independent module offered in the Instructor Led Training section of the Catalog and are able to enroll in the module on its own, independent of any course it may be a part of.

Note: If there are no sessions scheduled within the Instructor Led Training module, the module will be marked as “Closed” on the module’s page from the tile in the catalog.

Restricted Enrollment – When checked alone, users cannot see the Instructor Led Training module as an independent module offered in the Instructor Led Training section of the catalog. Only the Administrator (non-user) and users assigned roles that allow them to enroll users can enroll users in the Instructor Led Training as a standalone enrollment.

When both Standalone Enrollment and Restricted Enrollment are checked, users can see the Instructor Led Training module as an independent module offered in the Instructor Led Training section of the Catalog, but only the Administrator (non-user) and users assigned roles that allow them to enroll users can enroll users in the module.

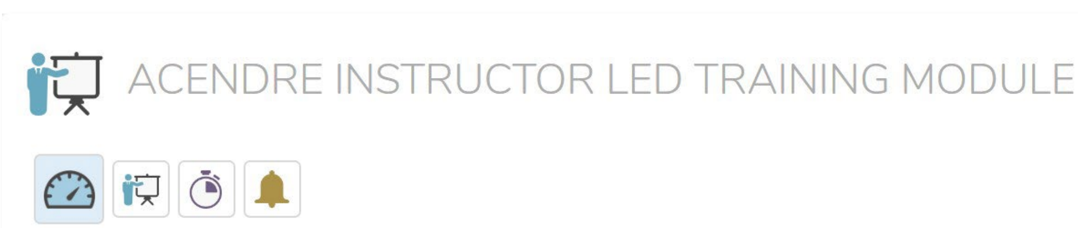
Restricted Drop – When checked, learner can only be dropped from the module by the Administrator (non-user), a user with permissions to manage user enrollments, or an instructor. When unchecked, the learner can drop from the module on their own.

<u>Modify Instructor Led Training Module</u>

For each Instructor Led Training module listed in "Instructor Led Training Modules", there are buttons you can click to modify the module:

- Instructor Led Training Properties
- Sessions

To view more information and modification options for an existing Instructor Led Training module, click on the name of the module in the list.



Dashboard – View a summary of the Instructor Led Training Module's information and sessions. You can also create new sessions and email notifications for the Instructor Led Training Module from the shortcuts listed under “Actions”.

Instructor Led Training Properties – All properties from the New Instructor Led Training Module page, with a Group Members tab.

Sessions - When you create and save a new Instructor Led Training module, you need to create sessions within the module. Without any sessions, the module is marked “Closed” when users attempt to enroll from the Catalog (if Standalone Enrollment is checked in Properties), or when the user clicks the module action button if the module is part of a course, the pop-up window will say that there are no available sessions.

New Session

Title – The name/label for the session.

Description – Optional description of the session, such as the subjects that will be covered, or any other details you would like to include.

Type – The session can either be web-based, through an online web meeting site like Join.Me or GoToMeeting, or it can be an in-person on-site session.

- Classroom-based – Give the City and State/Province in which the session will take place.
- Web-based – Fill our URL Registration if the webinar tool you are using requires a registration code. Fill out URL Attend with the URL which learners should navigate to in order to attend the session.
- GoToMeeting/GoToTraining/GoToWebinar/WebEx – To use the Default Organizer Username set for the service in the Web Meeting Integration section of the System menu, choose “Default Organizer” and enter the Password associated with that account. To use different credentials than those set for that service, choose “Add New” and enter the Username and Password for the new account you wish to add.

Seats – The maximum number of learners able to sign up for this session.

Waiting Seats – A maximum waitlist count for when the maximum number of learners have successfully signed up for the session.

Location Description – Here you can give website navigation instructions (if web-based), the exact street address of the session (if classroom-based), or any other applicable information regarding how to attend the session, if any.

Timezone – Time zone within which the session will occur (important to session start time). Users in other time zones will see accurate session times as long as their account is set to their own time zone.

Session Meeting Date(s) – A session can consist of several meeting dates/times.

If an instructor is a user in the system, they can be selected in the Instructors Tab. If a session requires the use of a learning space or equipment being tracked by the Resource Management section, those resources can be listed in the Resources Tab, and they will be scheduled as in use during the session's date(s)/time(s) in the Resource Management section.

Modify Session

Once you've created an Instructor Led Training session, click the button for the session in the list to add, drop, and move learners to, from, and between the seating list and the waitlist, and even grant completion status once the session time has come and gone. You can print out your roster of attendees by clicking the "Print Roster" link at the top of the session page. To update the properties of an existing session, click on the name of the session in the list.

Email Notifications – Set up email notifications related to events linked to this specific Instructor Led Training Module here. These notifications function just like those found in the Email Notifications section of the System menu, however when created from the Instructor Led Training page, the notifications only pertain to events related to the Instructor Led Training.

Resource Management

When physical resources (learning spaces, tools, equipment, etc) are limited and their use must be scheduled, you can use the Resource Management section to schedule the use of resources. Only the Administrator (non-user), and users assigned a role with the permission of Resource Manager, can create, manage, and schedule use of resources.

This function is not attached to users. Users cannot see scheduled use or maintenance of resources on their calendars, nor can they see a list of available resources anywhere on their dashboards.

Note: The user or person outside of the system assigned as the resource's owner cannot see, manage or schedule use of the resource either. They are only attached as a point of contact.

After you create a new resource, click the calendar to schedule use or maintenance of the resource. If outside use or maintenance is already on the calendar, another use or maintenance cannot be created during an overlapping time.

Once you schedule a use or maintenance session, a small calendar icon will appear on the calendar on the days that the use or maintenance is scheduled to occur. You can hover over the icon to see whether use or maintenance is scheduled, and exact times.

Learning Paths

New Learning Path

Clicking the ⊕ button on the top right corner of the Learning Paths box performs the same functionality as clicking "New Learning Path" from the Learning Paths page.

Name – Name of the Learning Path. This can only be seen in the Catalog, and, once the Learning Path is completed, in the Transcript Widget on the user's dashboard, under the Learning Path tab.

Catalog Shortcode – Giving a Learning Path a catalog shortcode generates a unique link to the Learning Path as viewed from the Catalog. This link will be in the following format, with {portal name} replaced with your portal hostname and {catalog shortcode} replaced with your chosen shortcode.

https://{portal name}.inquisiq.com/catalog/?type=learningpath&sc={catalog shortcode}

Cost – Charge users to self-enroll in the Learning Path if you have a payment gateway set up in E-Commerce.

Avatar – The image you upload appears as the background for the Learning Path tile in the Catalog, and as an icon next to the Learning Path title on the Learning Path enrollment page.

Published – When published, the Learning Path is visible and able to be enrolled in by users. When unpublished, the Learning Path is not visible and users are not able to enroll themselves. The Administrator (non-user) and users with certain privileges may still enroll users into an unpublished Learning Path.

Closed – When closed and published, a Learning Path is visible to users, but users are unable to enroll in the Learning Path, and where the “Enroll” link would be, there is a graphic indicating that the Learning Path is closed, and a lock icon appears in the top right corner of the Learning Path tile. The Administrator (non-user) and users with certain privileges may still enroll users into a closed Learning Path.

Short Description – Use this plain text only box for a brief description of the Learning Path. If you need graphics or need to go into more detail about the Learning Path, use the Description WYSIWYG box.

Search Tags – Put in this plain text only box any words you would like to be associated with the Learning Path for your users to be able to search for it in the search bar on the Catalog page. The search bar only pulls search results based on the Learning Path’s Name and Search Tags, so put any keywords from any of the Description boxes that you want your learners to be able to search for in the Search Tags box.

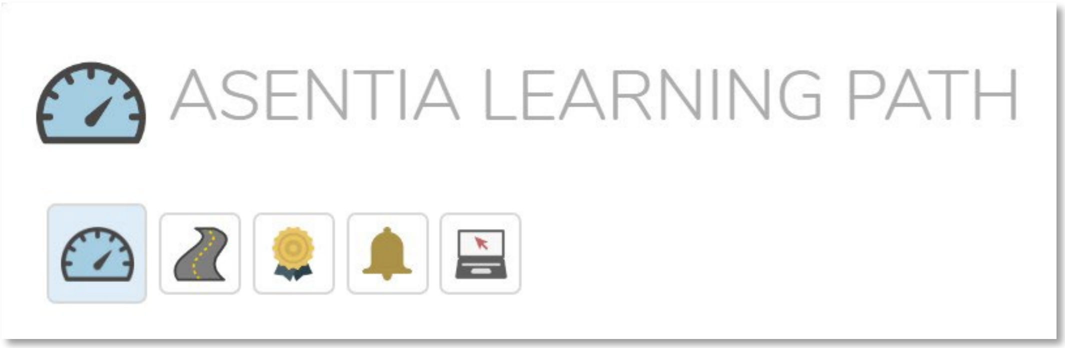
In the **Courses Tab**, select the courses that will be part of the Learning Path. You can arrange courses by clicking and dragging a course name. Checking the option for forcing courses to be completed in order would not allow the user to start any other course in the Learning Path while one of the courses is incomplete. Once the user completes a course, they will only have the option to start the next course in the set order.

Modify Learning Path

For each Learning Path listed in “Learning Paths”, there are buttons you can click to modify the Learning Path:

- Publish/Unpublish Learning Path
- Open/Close Learning Path
- Learning Path Properties
- Enrollments

To view more information and modification options for an existing Learning Path, click on the name of the Learning Path in the list.



Learning Path Dashboard – View a summary of the Learning Path's information, enrollments and stats. You can also create new Learning Path material, certificates, email notifications and enrollments for the Learning Path from the shortcuts listed under "Actions".

Learning Path Properties – View and modify Learning Path properties and courses set during Learning Path creation.

Documents can be uploaded for a Learning Path in the **Materials Tab**, which will be listed on the Learning Path enrollment page, and be able to be downloaded by all users, or only enrolled users, depending on the material's settings. To update the properties of existing Learning Path material, click on the name of the Learning Path material in the list.

Certificates – Users who complete all courses in the Learning Path will be awarded any certificates in this section. You can either create a new certificate, or you can build a certificate based on a certificate template, found in the Certificate Templates section of Learning Assets.

New Certificate

Name - The name of the certificate. Recipients can see this name in their account if they receive the certificate.

Issuing Organization – You can include in the certificate data where or which organization the recipient got the certificate from.

Credits – Indicate how many credits this certificate is worth. Note that Course Credits and Certificate Credits are separate, and never totaled together.

Code – Assign the certificate a code for your own internal tracking purposes, as well as for the Import Certificate Data function.

Status – If this box is unchecked, the certificate will not be awarded upon completion of all courses in the Learning Path.

Award – Whether or not this box is checked controls how the certificate is awarded if a user re-takes and passes the courses within the Learning Path again.

> Checked – The certificate's award date will reflect the date that the Learning Path was most recently completed and passed.
>
> Un-checked – The award date will reflect the first time that the Learning Path was completed and passed before the certificate expired. If the Learning Path is re-taken and re-passed before the certificate's expiration date, the award date will be the date upon which the Learning Path was first passed. If the Learning Path is re-taken and re-passed after the certificate's expiration date, the award date will reflect the date upon which the Learning Path was re-taken and re-passed.

Expiration – The certificate will be revoked upon the date of expiration, if there is one.

Description – Use the WYSIWYG box to describe the certificate (its significance, what it means, etc).

In the **Certificate Builder** tab, you can modify the appearance of the certificate. To change the certificate's image, click "Upload Background Image". Click the red "Menu" button, and type text into the "Static Label" box, and then click "Add" when you want to put it somewhere on the certificate. Click and drag the "Data Fields" to have data fields pulled from the recipient's profile when they are awarded the certificate.

New Certificate from Template

Select a template created in the Certificate Templates menu to use as the Certificate for this Learning Paths.

Email Notifications – Set up email notifications related to events linked to this specific Learning Path here. These notifications function just like those found in the Email Notifications section of the System menu, however when created from the Learning Path page, the notifications only pertain to events related to the Learning Path.

Note: The system prioritizes Learning Path email notifications over System email notifications. If there is an email notification in the system and one in a Learning Path's settings that both trigger upon the same event (i.e. Learning Path enrollment, Learning Path completion, etc), the system will ONLY send the Learning Path email notification.

Do note that if there is an email notification for a course in a Learning Path, as well as an email notification for the Learning Path itself, the user will receive both emails.

Enrollments – Set up a one-time enrollment ruleset for a Learning Path here. A few things to keep in mind…

- When enrolled in a Learning Path, the user will see each course in the Learning Path listed out in their Enrollments Widget. If the courses need to be completed in the order in which they are listed in the Learning Path course list, the user will be able to launch the first course, and the others will be visible but locked.
- Enrollments in Learning Paths cannot recur.
- Users have access to Learning Path courses indefinitely, unless they are already enrolled in a course or courses within the Learning Path. In this case, the amount of time that the learner has access to those courses is dictated by the parameters set in the individual enrollments to those courses.
- If any of the courses in a Learning Path are locked, the user will not be enrolled in the course.

Label – Internal label for the enrollment for internal tracking purposes. Only the Administrator (non-user) and any users with permissions to see and/or create enrollments for the Learning Path will see this label. Learners will not see this label; they will only see the Learning Path name.

Lifespan Start and Lifespan End dictate the timeframe within which users who match enrollment ruleset criteria will be enrolled. Before and/or after that timespan (if the Lifespan Start does not begin immediately, and/or the Lifespan End is not infinite), nobody will be auto-enrolled into the Learning Path.

Lifespan Timezone – The time zone within which the Learning Path is taking place. The Learning Path enrollment times will reflect differently for user profiles set to different time zones, relative to the enrollment's Lifespan Timezone. The default time zone for the enrollment is that which is set in the Account Settings section of the System menu.

Delay – If a user meets the ruleset criteria, they will be enrolled in the Learning Path this amount of time after they meet the criteria. If there is no delay, they will be enrolled right when they meet the criteria.

Due – This is the date on which the Learning Path must be completed by the user. If they do complete the Learning Path past the due date, their completion will be noted as overdue.

Access from Start and Access from First Launch both control the same parameter. This parameter controls when the user loses access to the Learning Path. Whichever date comes the earliest is the date on which the learner loses access to the Learning Path.

Note: Due date does not affect Learning Path access. If a user completes a Learning Path before the due date, they will continue to have access to the Learning Path up through the Access from Start or Access from First Launch date (whichever comes first). If a user does not complete a Learning Path before the due date, the Learning Path will be moved to a section of their enrollments marked “Overdue”, and they will have access to the Learning Path up through the Access from Start or Access from First Launch date (whichever comes first).

To update the properties of existing ruleset enrollment, click on the name of the ruleset enrollment in the list.

Certifications

Users can be awarded certifications for the successful completion of a series of courses and tasks.

New Certification

Title – The name of the certification.

Description – Plain text only box for a brief description of the certification.

Initial Award Expiration – The amount of time until the certification expires after it is initially awarded.

Renewal Expiration – The amount of time until the certification expires after it is renewed.

Accrediting Organization – Contact information about the organization issuing the certification.

Search Tags – Any words you would like associated with the certification for users to be able to search for it in the search bar on the Certifications page.

Note: Any part of the Description can also be used when searching for a certification.

Attached Courses – Courses that will be used to fulfill the requirements of the certification. Click "Attach Course(s)" to add courses that can be selected as part of a segment requirement of a unit within the Initial or Renewal tabs.

The **Initial and Renewal** tabs are used to set the requirements for the certification. Each certification must contain one or more units, with each unit containing one or more segments. Each segment can have one or more requirements, each relating to the completion of specific course(s), the collection of a certain number of credits or the completion of an external task. When adding several segments to a unit or several units to a certification, you have the option of choosing whether all parts or only one part must be completed by clicking the "AND" or "OR" buttons, respectively. The Initial requirements for a certification can be used for the Renewal requirements when the "Use Initial Requirements" in the Renewal tab is checked. Otherwise, different requirements can be set in the same way the Initial requirements were set.

Modify Certification

For each certification listed in “Certifications”, there are buttons you can click to modify the certification:

- Certification Properties
- Auto-Join Rules
- Email Notifications

To view more information and modification options for an existing certification, click on the name of the certification in the list.

Certification Dashboard – View a summary of the certification’s information and stats. You can also create new email notifications and auto-join rulesets for the certification from the shortcuts listed under “Actions”.

Certification Properties – View and modify certification properties, initial and renewal requirements set during certification creation (see above).

Email Notifications – Set up email notifications related to events linked to this specific certification here. These notifications function just like those found in the

Email Notifications section of the System menu, however when created from the certification page, the notifications only pertain to events related to the certification.

Note: The system prioritizes certification email notifications over system email notifications. If there is an email notification in the system and one in a certification's settings that both trigger upon the same event (i.e. certification enrollment, certification awarding, etc), the system will ONLY send the certification email notification.

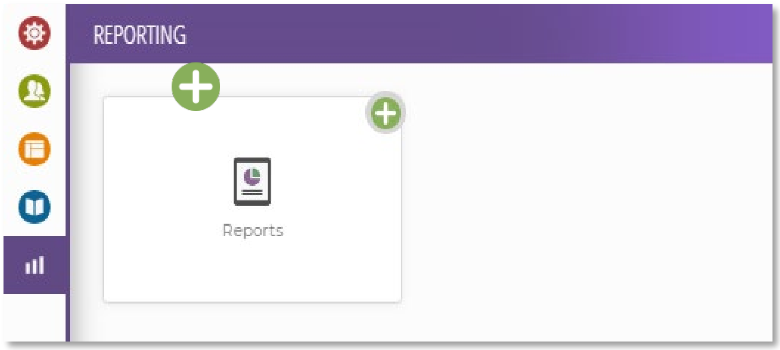
Auto-Join Rules – Click "New Ruleset" to set rules that automatically enrolls new users for the certification based on the criteria in the ruleset. To update the properties of an existing ruleset, click on the name of the ruleset in the list.

Certificate Templates

If you have multiple courses that all use the same certificates, you can create Certificate Templates to pull from when you need to create a new certificate (in the individual course's certificate section) to be granted upon completion of that course.

The process for setting up a Certificate Template is the same as setting up a new certificate in a course's Certificate section.

Reporting



Clicking the button on the top right corner of the Reports box performs the same functionality as creating a new report from the Reports page.

New Report

To create a new report, click the green plus icon next to the data set you wish to pull from: User Demographics, User Course Transcripts, User Learning Path Transcripts, User Instructor Led Training Transcripts, User Certification Transcripts, Catalog and Course Information, or Certificates.

Note: If you need data from a combination of two or more data sets, let us know by putting in a ticket at our support site (https://acendrelearn.zendesk.com/) and we will create a custom report for you.

Use the **Columns** tab to select the fields that you would like to appear in the report.

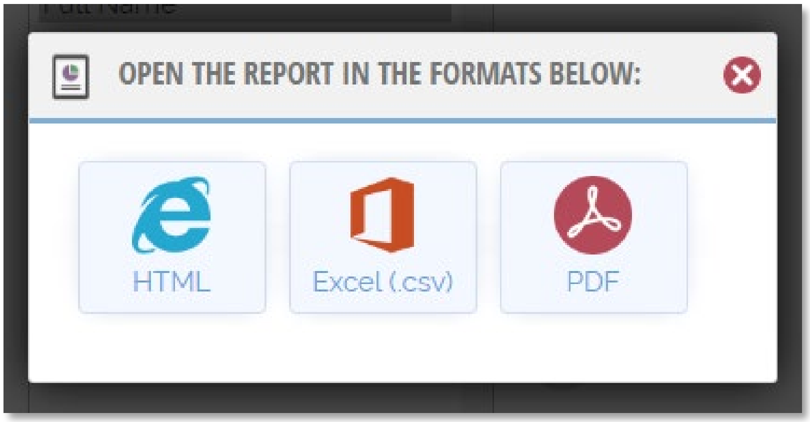
Use the **Filters** tab to limit the amount of and/or specify what data you would like pulled by the report. Note that once you reach three filter criteria, you can edit the Criteria Pattern by clicking the “Change Pattern” link. You can change the order, priority, and way the criteria are applied.

Use the **Order** tab to determine what order the data in the report should be listed in.

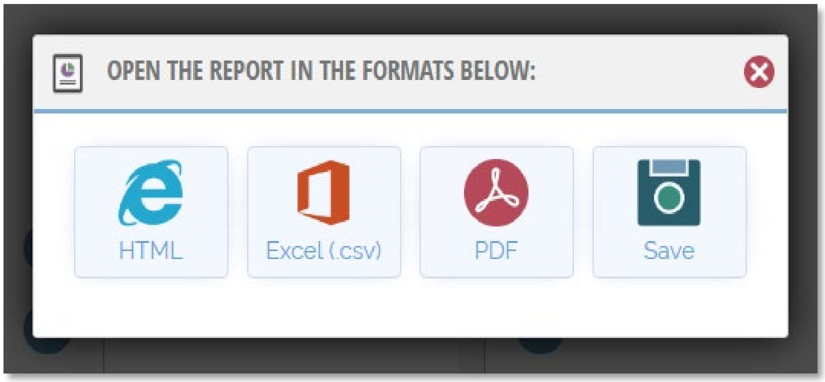
Click the button to add another field to order the report by (secondary to the first field).

Use the **Properties** tab to give the report a name and set its privacy to public or private. Filling out these properties is required if you would like to save this report for future use.

Click “Run Report” under any of these tabs in order to be given the option to view the report as an HTML page, or to download the report as an Excel spreadsheet or a PDF file.



Click “Create Report” to save the report and be able to run it in the future and/or to be able to create a subscription to a report. Your saved reports will be listed under the “My Saved Reports” tab. Reports that others have created and marked as public will be listed in the “Public Saved Reports” tab.



Modify Report

To update the properties of an existing report or run the report, click on the name of the report in the list. Click “Add to Report Shortcut Widget” to have a shortcut to the report’s modification screen appear in the Report Shortcuts Widget on the [My Dashboard]() page.

Save Report

To save a copy of the data pulled in a report from a specific time to the LMS, click “Run Report” after clicking on a report from the list, and then click the “Save” icon. A “Saved Files” tab will appear, and the file will show in a list, where you can see when the report was generated, how big the file is, and you can view the file in HTML, as an Excel file, and/or as a PDF.

	Generated	Size	View HTML	View Excel	View PDF
	5/9/2017 @ 5:00 PM	144			
	5/9/2017 @ 5:00 PM	144			

Delete Selected Report File(s)

Report Subscription

IMPORTANT NOTE: The Administrator (non-user) CANNOT create a report subscription. Only a USER account assigned a role with permissions to run reports can create report subscriptions.

To configure a subscription to a report, log in as a user with reports permissions, navigate to the Reports page and click on the name of a report from the My Saved Reports tab or the Public Saved Reports tab. Click the Subscription tab (again, not available to the Administrator non-user) and set up the parameters of your report subscription.

The **Start Date** is the date and time from which the report will begin collecting data. The data in the report will be pulled from the date range between the Start Date and the date that marks the length of time set in the report **Frequency**.

Note: A report WILL NOT be run upon creation of the subscription. You will need to run the report from the “Run Report” button should you require a report containing current data.

My Dashboard

The Widgets that appear on the dashboard are enabled and disabled from the Widgets tab on the Configuration section under the System menu, as well as in the individual sections of other Administrative Widgets (some dashboard Widgets can be enabled from settings in these sections). Dashboard Widgets can be clicked and dragged into any position relative to other Widgets on the dashboard that the administrator or user desires.

The types of Widgets visible to a user depends on their permissions.

Learner Widgets

Enrollments – Lists user's current, completed, overdue, and expired enrollments (cannot be removed from learner dashboard).

Purchases – Lists purchases made by the users.

Certificates – Lists certificates earned by the user.

Calendar – Shows events in which the user is involved (sessions, courses, etc).

Discussion Feed – Lists messages in discussion boards for courses that the user is enrolled in (only those messages that have been approved, if approval is required by the course's settings).

Transcript – Lists completed courses, Learning Paths, and Instructor Led Training modules.

My Communities – Lists any groups the user is in.

My Learning Paths – Lists any Learning Paths the user is enrolled in.

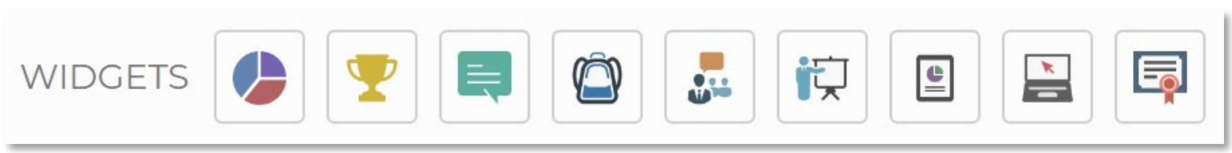
My Leaderboards – Learner users ranked by parameters set in the drop-down menus at the top of the Widget.

My Certifications – Lists any certifications the user is enrolled in.

Documents – Lists any documents available to users within their enrollments.

Instructor Led Training Sessions – Lists any upcoming Instructor Led Training sessions the user is enrolled in.

Administrator Widgets



Enrollment Statistics – Contains data about enrollments in courses and Learning Paths.

Team Leaderboards – Learner users ranked by the parameters set in the drop-downs at the top of the Widget.

Discussion Moderation – Lists discussion posts requiring approval.

Task Proctoring – Lists Task-type modules completed by users that require approval. Click the green arrow in each learner's row to view their submission, mark the task as "Completed", mark the Success Status of the module, and give a Score for the module (if applicable). Once marked "Completed", the Task module will be removed from the Task Proctoring Widget.

For courses with the “Proctors” boxes checked under “Task” in the Content tab of the module, Supervisors and Experts can see this Widget on their dashboards and mark tasks “Completed” and grant status and scores.

OJT Proctoring – Lists requests for OJT-type module completion by the Administrator (non- user), Supervisor, or Expert.

For courses with the “Proctors” boxes checked under “Task” in the Content tab of the module, Supervisors and Experts can see this Widget on their dashboards and mark tasks “Completed” and grant status and scores.

Instructor Led Training Roster Management – Lists upcoming and completed Instructor Led Training sessions for which users have enrolled in. Users can be demoted to the waitlist from the enrolled list, and waitlist users can be manually promoted to the enrolled list if a user is demoted or dropped from the enrolled list. Completion and Course Statuses can also be granted to users in the roster for each session that appears in the Widget.

For Instructor Led Training sessions with Instructors selected, those Instructors can see this Widget, and manage users enrolled in the session and on the waiting list. They can mark user completion status for the session and award scores, as well.

Report Shortcuts – Lists public reports and reports created by the Administrator (non-user) or users with Reporting permissions. Report names can be clicked to go to the report’s modification page.

Pending Enrollments – Lists pending enrollment approval requests for courses with “Self- Enrollment Approval” enabled.

Certification Task Proctoring – Lists Certificate External Tasks submitted by users that require approval.

Reporter Widgets

Report Subscriptions – Lists report subscriptions created by the user (only users in a role with Reporting permissions can see this Widget). Subscription names cannot be clicked to go to the report. To add a report to the Report Shortcut Widget, follow instructions under the Report Subscription section.

Message Center

Send messages to users in the system here. You cannot send messages to email addresses outside of the LMS. This messaging system is for communication within the LMS only. The user will not receive a copy of the message in their regular email inbox; they will only receive the message in their Message Center in the LMS. The Administrator (non-user) cannot be sent messages from users; users can only reply to messages from the Administrator (non-user) and send messages to other users in the system.

The body of the message accepts plain text only. Images, videos, and other media are not accepted by this text box.

Catalog

The Catalog page is what your users see. This is where your users can see your catalogs, courses, course modules, Learning Paths, Instructor Led Training modules, and groups (called “Communities” on the Catalog page). Only items that learners can self-enroll in or self-join, and those items that are published (if they have “publish” settings) will show in this section.

What users can and cannot see on this page and on the pages of each tile is determined by your settings for each of the courses.

Note that sample screens are visible on course catalog pages, and Learning Paths inherit the sample screens of the courses within them, and those sample screens are in turn visible on the Learning Path’s catalog page.