

INQUISIQ^{r3}

Unleash the Power of e-Learning

Administrator Manual – Users and Groups

Version 1.6

January 2014 Edition

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Product Support

If you have purchased a support package and have any questions during the use of Inquisiq R3™ that are not addressed in this guide, please visit our support site at:

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Overview

The **Inquisiq R3™ Administrator Manual – Users and Groups** covers all of the areas in the Inquisiq R3™ Learning Management System related to users including groups and import activity.

All of our user guides, manuals, sample SCORM packages, and white papers can be found on the Inquisiq R3™ website at <http://www.inquisiqr3.com/resources/documents/>

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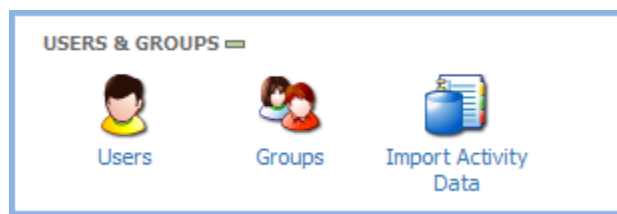
Granting Permissions to Users

You will need to select the permissions that a user will require to perform his or her task(s) in the system. The permissions that pertain to users and groups are discussed below. For additional information on user permissions, please refer to the **Master Administrator and Overview Manual**.

- **User Creator** (global) - This role allows this user to create new user accounts as well as edit user account information such as username, contact info, employee information, etc. This role does not allow access to any of the functions granted by the "User Manager" role.
- **User Deleter** (can be restricted to specific groups) - This role allows this user to delete accounts. No other capabilities are granted.
- **User Editor** (can be restricted to specific groups) - This role allows the user to edit user account data such as username, contact info, employee information, etc. This role does not grant any other capabilities.
- **User Manager** (can be restricted to specific groups) - This role allows the user to perform user management functions such as assigning and revoking user and group enrollments, awarding and revoking certificates, and importing external training histories.
- **Group Creator** (global) - This role allows the user to create, delete and manage the memberships of groups. This role does not grant any capability to create, edit, delete or manage users in any way other than joining and removing them from groups.

Administrator Menu – Users & Groups Category

Users that have been granted the appropriate permissions (as discussed in the previous section) will see the **Users & Groups** sub-menu when they navigate to the Administrative Menu screen.



The **Users & Groups** sub-menu includes all user and group management functions, such as creating, editing, and managing users and groups. To expand or collapse this category, simply click on the (+)(=) icons next to the **Users & Groups** title. The **Users & Groups** section allows you to manage the following areas:

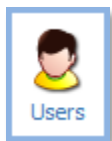
- **Users** – this is where you will create and manage user accounts.
- **Groups** – this is where you will create and manage groups.
- **Import Activity Data**– this is where you can import historic course completion data for users who have taken courses outside of the Inquisiq R3™ LMS. This information can be imported and displayed on user transcripts and in reports.

Users

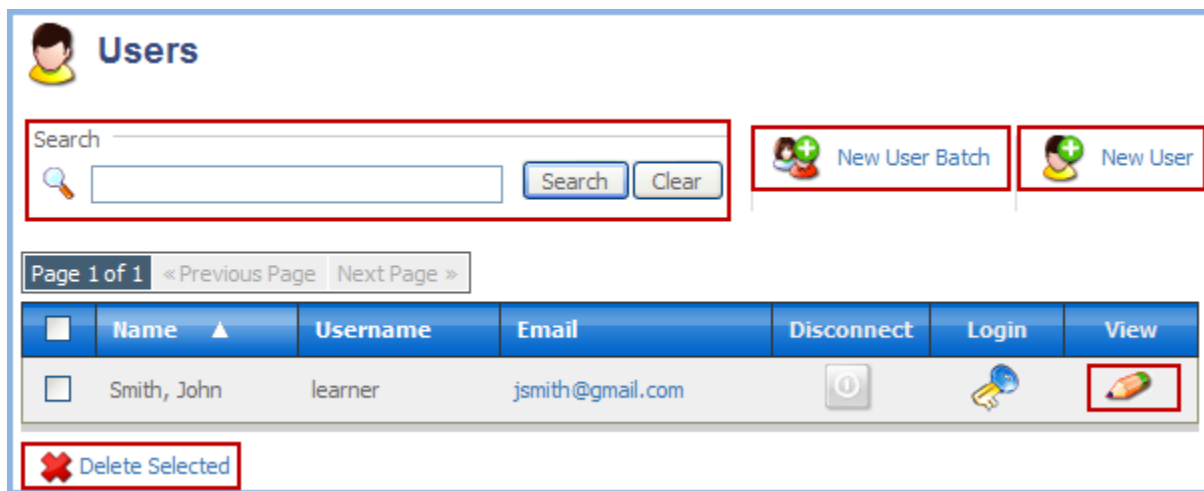
The **User** screen displays a list of all the user accounts in your Inquisiq R3™ system. You can use the **Previous Page** or **Next Page** buttons to move through the user list. You can also use the search function. Enter any part of the first name, last name, username, or email and the search function

will display the list of users that matched the search criteria. To access the **Users** screen, follow the steps below:

1. Click the **Administrator Menu** button on the Main Menu.
2. Click on the **Users** icon located in the **Users & Groups** sub-menu.



3. The **Users** screen lists all of the users currently in the LMS and displays key information such as the user's name, username, and email. From this screen you can add, modify, or delete users.

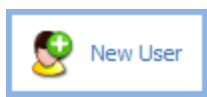


Adding or Modifying a User Account

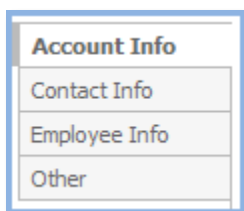
"User Creator" permission is required to create user accounts. This role allows the user to create new user accounts as well as edit user account information such as username, contact info, employee information, etc.

To add a user:

1. Click the **New User** icon to add a user or click the **View** icon (✎) to modify an existing user account.



2. Enter or modify the user's profile: Account Info, Contact Info, Employee Info, and Other. These tabs are located in the upper left side of the screen. By default, only the First Name, Last Name, Username, and Password fields are required.



Note that the user's profile screen can be modified and configured by clicking the **User Account Data** icon in the **Systems** sub-menu. Please refer to the **Inquisiq R3™ Administrator Manual – System and Interface Configuration** for more information.

3. Click **Save Changes**.



Navigating the User Detail Screen

The **User** screen includes all user account information and is broken up into four tabs: Account Info, Contact Info, Employee Info, and Other.

Account Info Tab

The screenshot shows the 'Account Info' tab of a user management interface. On the left is a sidebar with four tabs: 'Account Info' (selected), 'Contact Info', 'Employee Info', and 'Other'. The main area contains several form fields: 'Name' with sub-fields for 'First Name', 'Middle Name', and 'Last Name'; an 'Email' field; a required '* Username' field with validation rules (6-25 characters, no 'admin' or 'administrator'); a required 'Password' field with validation rules (6-25 characters, no 'password', '123456', '654321', or the username) and a 'Confirm by entering again:' field; a 'Local Timezone' dropdown menu set to '(GMT -5:00) Eastern Time (US & Canada)'; a 'Language' dropdown menu set to 'English'; 'Created' and 'Last Login' fields both showing '-'; an 'Expires' section with two '- Select' dropdowns, a date input field, and a checked 'Never Expires' checkbox; and a 'Status' section with 'Enabled' (selected) and 'Disabled' radio buttons. At the bottom are 'Create Account' and 'Cancel' buttons.

When modifying an existing user account, the original **Password** field will be replaced with an option to force a user to change their password when they login next or enter a new password for the user.

Password: *****

☐ Force user to change password at next login.

New Password:

- Must be at least 6 characters and no more than 25 characters.
- Cannot contain 'password', '123456', '654321' or contain the username.

Confirm by entering again:

Field Definitions:

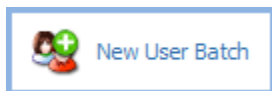
- **Name** – the full name of the user. First and last name are required.
- **Email** – the user’s email address. This email address will be used for email notifications and report subscriptions.
- **Username** – the username must be unique and contain between 6 and 25 characters.
- **Password** – the password must not contain between 6 and 25 characters.
- **Local Time zone** – the local time zone of the user. This will be used when scheduling synchronous events like classroom sessions and web meetings.
- **Language** – Currently, English is the only option.
- **Created** – the date the user account was created.
- **Expires** – the date the user account will expire.
- **Last Login** – the date the user last logged into the LMS.
- **Status** – the option to enable or disable a user account.

Adding or Modifying User Accounts through a Batch Upload

You can create a batch of new user accounts all at once by uploading a tab delimited text file. The formatting of this text file is critical and if not done correctly will result in incorrect user information or a failure to create the user account(s). “User Creator” Permission is required to perform a user batch upload. Before you perform a user batch upload you should make sure that the User Account Data has already been properly setup.

To add a batch of users:

1. Click the **New User Batch** icon to add a batch of users.



2. Verify that your batch file is formatted correctly. The **Batch** screen provides a reference guide on how to format the tab-delimited text file for the user batch upload.


Users : Batch

Details

Use the table below as reference for creating a tab-delimited text file to add and/or modify your user accounts.

Column	Data	Required	Unique	Type	Length	Format
Column A	First Name	YES	-	Text	255	
Column B	Middle Name	-	-	Text	255	
Column C	Last Name	YES	-	Text	255	
Column D	Email	YES	-	Text	255	
Column E	Username	YES	YES	Text	512	
Column F	Password	YES	-	Text	512	
Column G	Must Change Password	-	-	Boolean	-	True or False, specified as: "1" or "0"
Column H	Expires	-	-	Date/Time	-	ISO Datetime: 2013-01-01 14:30:00
Column I	Company	-	-	Text	255	
Column J	Street Address	-	-	Text	512	
Column K	City	-	-	Text	255	
Column L	State	-	-	Text	255	^[a-zA-Z]{2}\$
Column M	Postal Code	-	-	Text	25	
Column N	Country	-	-	Text	50	^US\$
Column O	Primary Phone	-	-	Text	25	

ACTIONS:

 [Upload Batch File](#)

IMPORTANT:

 The Username column will be used to identify existing users for update from your data file. If no user exists, a new one will be created.

 This process is a "raw-data" process. Your data will not be checked against all validation rules. You should be sure that your raw data complies with your validation settings prior to uploading.

COLUMN DETAILS:

- **Required** - 'YES' indicates that all rows must contain data in this column otherwise your file will not be processed. This requirement will be validated.
- **Unique** - 'YES' indicates that data in this field must be unique for each user. Used for fields such as usernames or identification numbers that cannot be shared by more than one user. This requirement will be validated.
- **Length** - The maximum number of characters that the database will allow for the column. Note that your system may be configured for more restrictive lengths. This is for information only and will not be validated - be sure to review your configuration.
- **Format** - Displays formatting information for the column. Values such as ^.{6,25}\$ are in *regular expression format*. This is for information only and will not be validated.

IMPORTANT FORMATTING NOTES:

 Note the following before creating your data file:

An easy way to do this is to use a spreadsheet program like Microsoft Excel to format the data into different columns which then get translated into tabbed columns when saved as a tab-delimited text file. Note the following before creating your batch data file:

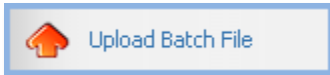
- The uploaded file must be a tab-delimited text file (with extension .TXT).
- Include all data columns (even those marked as NOT USED) in your file.
- All required fields must have data.
- Do not enclose cells values in quotations ("").
- Do not include tabs in cell values.
- The "Supervisor" field (if used) must be populated with the supervisor's username.
- The "Country" field (if used) must be populated with the country's 2-digit code.
- Do not include column headers.
- Be sure that no extra empty lines exist at the end of your file. Programs like Microsoft Excel, when saving to tab-delimited format, can sometimes insert blank lines at the bottom of the file. You can go into the text file and delete these empty lines so that the last character of the file is the "D" of the "END" in the last row of data.

- The Username column (column E) will be used to identify existing users in the system and update their user information with the data in the batch upload. If the username does not already exist then a new user account will be created.

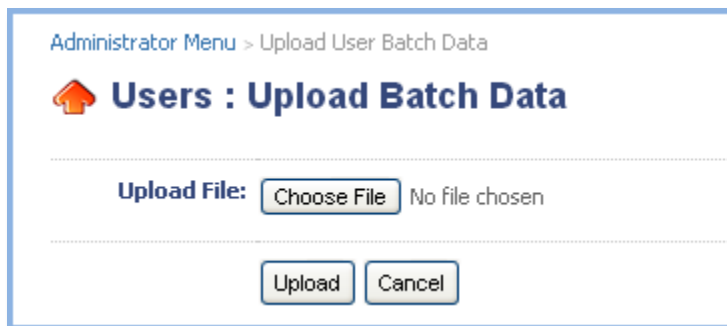


The data in the batch upload will overwrite the data in the LMS. Therefore, a blank field will clear out the existing LMS data for that particular field in the user's data.

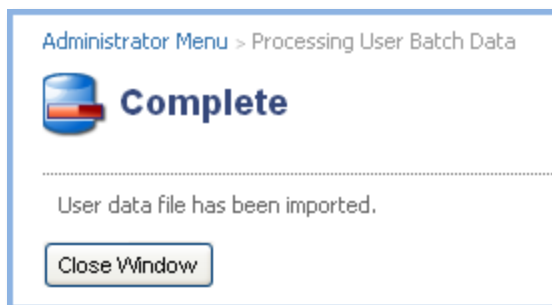
3. Click the **Upload Batch File** icon.



4. Click **Choose File** to select the desired tab-delimited text file from your workstation. Then click **Upload**.



5. Click **Close Window**. Once the file is uploaded, it cannot be modified or removed. To change or correct the user information uploaded into your system, you will need to update the file and re-upload it into your system.



Disabling a User Account

A User Account can be disabled which will preserve the user account but will disable their ability to log into the system. Disabling an account will not remove or alter the user's records in any way.

To disable a user account:

1. Click the **View** icon (🔍) of the user account that you want to modify.
2. Click the **Disabled** radio button in the **Status** field of the **Account Info** tab.
3. Click **Save Changes**.



Done

User account has been saved successfully.

Deleting a User Account

The deletion of a User Account will result in the complete removal all user data associated with that account. This includes the deletion of all enrollment data and all history for that user from the system. Once deleted, this information cannot be recovered – it is permanently gone.

To delete a user account:

1. Select the checkbox to the left of the user(s) that you want to delete.
2. Click the **Delete Selected** link.



Delete Selected

3. Follow the onscreen instructions and click **OK** to delete the user(s).



Done

User(s) have been deleted successfully.

Changing a User's Password

To change a user's password, go to the **Users** section (Administrator Menu > Users & Groups) and select the 'View' icon (pencil) to the right of the user account to which you want to apply this change. On the first **Account Info** screen, find the 'New Password' area and the related notes (6 character minimum, 25 character maximum, etc). Type the new password into the first open field, and then type it again into the second open field for confirmation. Be sure to click the 'Save Changes' button at the bottom of the screen for the change to take effect.

Creating a New Course Enrollment

Enrollment is a very important concept in Inquisiq R3™ and worth some detailed explanation. In order for a user to "take" a course they must be enrolled in it. When the user is enrolled in a course, it will appear on their **My Account** screen under the 'Enrolled' tab. However, what makes enrollments particularly powerful is that you can establish different parameters or rules for each enrollment. For example, enrollments can have Start and End dates. They can also have Due dates and can even be configured to automatically recur multiple times.

Manually enrolling a user in a course is done from the **Users** section (Administrator Menu > Users & Groups). From the **Users** section, click the 'View' icon for the user you want to enroll. From the top-right Tools area of the resulting screen, click the 'Enrollments' icon.

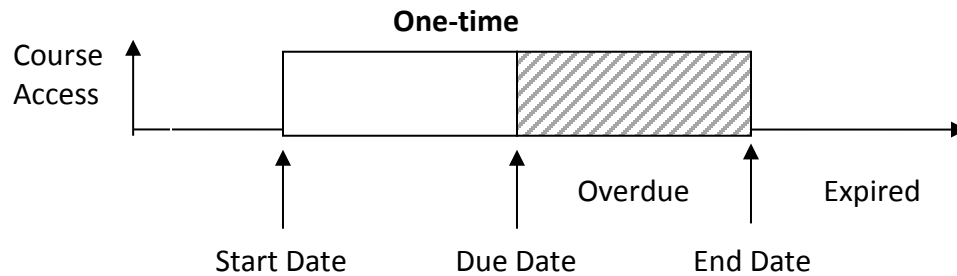
Fundamentally, enrollments can be one of two types; they are either a **One-Time Enrollment** or a **Recurring Enrollment**. One-Time Enrollments, as the name suggests, is a single one-time enrollment that does not recur. This is the most basic and common type of enrollment that will be used when you want to enroll a user in a course so that they can access it from their **My Account** screen. The Recurring Enrollment, on the other hand, is more complex and can be scheduled to recur at a given frequency over a period of time. For example, recurring enrollments are useful if you want a user to take a course every year.

(1) **One-Time Enrollments Configuration** – are the most basic type of enrollment and have the following properties:

- a. **Course** – when you create a new enrollment you must select a course or courses that the user will be enrolled in. You can select a single course or multiple courses, however it is very important to note that if you select multiple courses that you will end up making multiple separate enrollments (one for each course) that all have the same configuration parameters, though they can subsequently be modified separately if necessary.
- b. **Prerequisite** – this option allows you to override the prerequisite option that may be associated with the courses in this enrollment. By default this option will be checked so a user who is enrolled in this course must have met the prerequisites before they will be able to launch the course. Uncheck this box if you want to allow an individual to launch the course regardless of whether or not they meet the course prerequisites.
- c. **Start date** - is when the enrollment is to begin. Note that the start date must be in the future (you cannot make it retroactive to sometime in the past). A user will not see the enrollment on their **My Account** screen until the start date.
- d. **End date** - is when the enrollment will end or expire. This means that the user will no longer have access to the course once the end date occurs. When the enrollment end date is reached, the course enrollment will move from the users 'Enrolled' tab to the 'Expired' tab (if the course enrollment is not completed first). Once the course enrollment is on the 'Expired' tab, the user will not be able to launch the course.

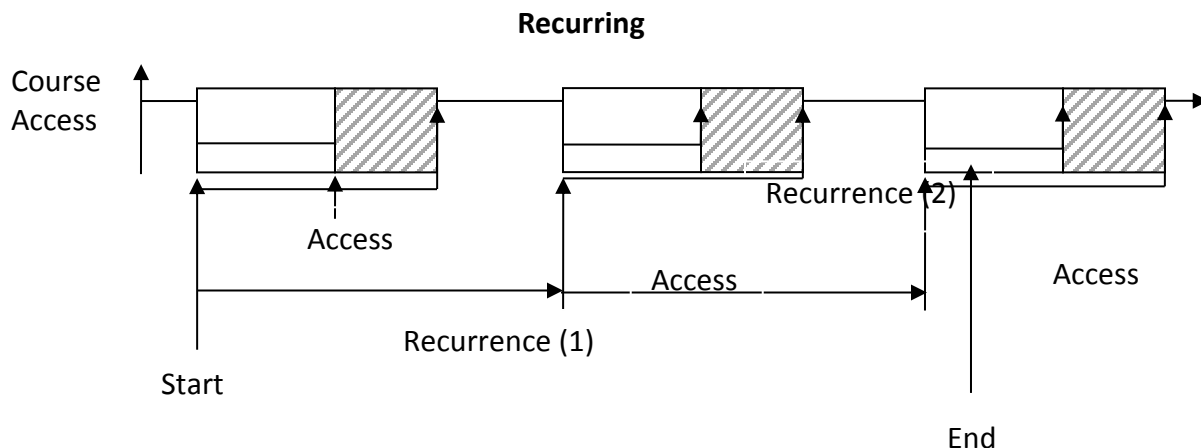
Also note that the end date is optional. If you select the 'No end date' option, the course will stay on the user's 'Enrolled' tab until it is completed.

- e. **Timezone** - allows you to set the time zone for the times specified in the enrollment Start, Due, and End dates.
- f. **Due date** - is optional and allows you to create a time period where the enrollment status is changed to Overdue (i.e. 2 weeks, 4 months, 1 year, etc.). When this occurs, the course will move from the users 'Enrolled' tab to the 'Overdue' tab - note however that the course can still be accessed and launched by the user when it is overdue. One of the main reasons for setting a due date is so that you can run reports on courses to aid in progress tracking. If 'No due date' is checked, the course remains in the user's 'Enrolled' tab until it is completed.



(2) **Recurring Enrollment Configuration** – includes all the same configuration parameters as the one-time enrollment with several additional settings for determining on what frequency you want the enrollment to recur.

- a. **Recurrence** – enter in the period of time that you would like to have the enrollment recur in. You will need to select the unit of time from the pull-down list and then the number of units can be entered in the blank field. For example, if you select Month(s) from the pull-down and enter 6 in the field, you will have the enrollment recur every six months. Note that this enrollment will continue to recur until the enrollment end date is reached. In other words, if the date for the next recurrence is less than the end date then it will recur as normal, on the other hand, if the next recurrence date is after the end date then it will not recur.



Revoke/Reset/Modify an Existing Enrollment

Remember that for any user to take the lessons in a course, they must be enrolled in the course. When a user is enrolled in a course, it will appear on their **My Account** screen under the 'Enrolled' tab. As an Administrator, there may be occasions when you need to modify a specific course enrollment for a user. For example, you may want to change the due date or the access period. To make such a change to an enrollment, you must go to the **Users** section (Administrator Menu > Users & Groups), and select the 'View' icon of the user whose enrollments you would like to change. On the user's account screen, select the 'Enrollment' icon in the Tools area located in the upper-right portion of the screen. The **Enrollment** screen will then display a list all of the enrollments for this user. Note that the list displays some important information about each enrollment. For example, the list will display the type of enrollment along with the start, due, and end dates. The list also contains buttons to reset and modify the enrollment. Additionally, there is an Activity button that will allow you to see the detailed lesson activity for that enrollment which includes the completion status, the number of attempts, and elapsed time.

- (1) **Deleting an Enrollment** - If you would like to delete the enrollment, select it by clicking the check box on the left and then click the Delete Selected link under the list.
- (2) **Reset Enrollment** - You can also reset the enrollment by clicking the double green arrows in the Reset column. Resetting an enrollment will reset all user activity for that enrollment; however, the parameters of that enrollment will remain unchanged.
- (3) **Modify an Enrollment** - You can change any of the enrollments by clicking the 'Modify' icon (pencil) to display all the enrollment parameters that can be changed, such as Start date, timezone, access, etc. Note however that the Course cannot be changed – if you want to change the course you would have to delete this enrollment and create a new one.

Enrollment Activity

To view the detailed activity of a specific enrollment you would go the **Users** section (Administrator Menu > Users & Groups) and select the user of interest. Click the 'Enrollments' icon in the right-side Tools area to see a list of all enrollments for the selected user. Note the 'Activity' icon for each enrollment in the list. Clicking this icon will show the detailed activity for this specific enrollment. The activity screen will include the following information:

- **Enrollment start date**
- **Enrollment end date** (if one was established)
- **Course enrollment status** - Note that this will display the current status and is also a control that allows you to change the status to either *Incomplete/In-Progress* or *Completed*. If you are setting it to *Completed* then you will also need to enter the completion date.
- **Lesson Activity** – you will see a list of all lessons in the course. The list will display the following information for each lesson:
 - i. Lesson name and type
 - ii. completion and success status for each lesson
 - iii. score (if one has been received)
 - iv. number of attempts
 - v. elapsed time (total time the user has spent in this lesson)
 - vi. Reset button – if clicked will reset the status and score but will **not** reset the number of attempts

Joining/Removing a User to/from a Group(s)

Group membership is a very powerful tool that can allow you to automatically enroll users in courses, provide access to restricted catalogs, control permissions, and can be used for filtering reports. Joining a user to, or removing a user from, a group is done in the **Users** section (Administrator Menu > Users & Groups). In the **Users** section, click the 'View' icon for the user that you want to modify. Once on the user's account screen, select the 'Groups' icon in the Tools area located in the upper-right portion of the screen.

The **Groups** section displays a list of all the groups in which the user is currently enrolled. To add the user to other groups, select the green plus sign ('Add to Group(s)') located under the group list. This will cause a window to open that contains a list of available groups. Select the groups you would like to add the user to (hold the ctrl key down to select multiple groups). After you have selected all the groups you want to add the user to, click the OK button. This will be followed with

a confirmation screen where you can either click the Done button or click the Add More button to continue adding the user to more groups.

In a similar fashion, if you would like to remove the user from any groups, click the red X button ('Remove from Group(s)') below the group list and select which groups to remove the user from. Note that sometimes the **Group List** screen does not automatically update to reflect the changes you just made. By clicking Done to return back to the **Users** screen and then reselecting 'Groups', the list will refresh to reflect the recent changes.

Awarding / Revoking Certificates

As an Administrator, you may manually award or revoke certificates for individual users. Note that certificates are automatically awarded to users who meet the certificate's criteria so you may not normally use this function except in a situation where you want to manually award or revoke the certificate. In the **Users** section (Administrator Menu > Users & Groups), select the 'View' icon for the user that you want to change. Select the 'Certificate' icon in the right-side Tools area of the user's account. The resulting screen will display a list of the certificates that the user has been awarded.

Note that you can view or print the certificates from this screen, and can also click the check box on the left side of the list to select any specific certificate that you would like to revoke. To revoke a certificate, select the target click the 'Revoke Selected' icon that is located under the list to revoke the selected certificates.

To award a new certificate, select the 'Award a Certificate' icon in the upper-right area of the same Certificate screen. Select the appropriate certificate from the pull-down and specify a date and time associated with when the certificate award. Click the 'Save Changes' button to complete the task.

Granting / Revoking Private Catalog Access - Users

In many cases you may desire Catalogs to be private. First, create a catalog and designate it as Private. The process for doing this is explained in the **R3 Admin - Content Manual**. Once you have private or restricted catalogs setup, only users that have been specifically granted access will be able to see and open them. This permission can be granted either on an individual basis or on a group basis.

To provide a specific user access to private or restricted catalogs, go to the **Users** section (Administrator Menu > Users & Groups). Click the 'View' icon for the user and, once on the user's account screen, click the 'Private Catalog Access' icon in the upper-right Tools area. The **Private Catalog Access** section will display a list of catalogs in the system. All of the regular, non-restricted, catalogs will have checkboxes in front of them that are checked, meaning the user automatically has access to those catalogs since they are not private. The private catalogs will have an empty checkbox in front of them. Click the box of a private catalog to add a check mark which will then grant the user access to that private catalog. Once you have selected all the private catalogs that this user should have access to, click the 'Save Changes' button for the changes to take effect.

Setting Permissions

(To set permissions you must be logged in as the Master Administrator. See the **R3 Master Administrator & Overview Manual** for details on setting user permissions.)

Importing User Activity Data

Inquisiq R3™ allows you to import historic course completion data for users who have taken courses outside of the Inquisiq R3™ LMS. This information can be imported and displayed on user transcripts and in reports. To use this feature, you must be logged in as the Master Administrator or a user with the User Manager permission. For instructions on how to use this feature, see the **Import Activity Data** section of this document.

Groups

Overview

Inquisiq R3™ has a powerful Groups feature to aid in a variety of functions. Fundamentally, to create a Group in Inquisiq R3™ you define its name and the users in the Group. You can set up as many groups as you like and there is no implicit hierarchy to the groups (no sub-groups or group relationships). You can if you want have users simultaneously in several groups. Your strategy for what groups to setup will be based on how you want to use the group:

1. **Automating Course Enrollments:** Similar to enrolling an individual user in a course, can you also enroll a group in a course. Doing so is equivalent to individually enrolling each user in the course separately – but, by using the group enrollment function, it is just one operation. In addition, another important aspect of this group enrollment function is that once you enroll a group in a course (or courses) then in the future, anyone who is added to the group will then automatically be enrolled in those courses as well. This ability allows you to create groups based on training needs. As users are added to, or removed from, the appropriate groups, the course they are enrolled in will automatically adjust.
2. **Restricted Catalog Access:** There are times when you may want your Course Catalogs to be visible only to certain people. You can accomplish this by specifying the Catalog as restricted, which will then block access to the catalog to only the users that have been granted access. Restricted Catalog Access can be granted on either an individual or group level (see the **Inquisiq R3™ Admin - Content Manual**).
3. **Permission Control:** Users can be assigned different permission that will give them the ability to perform certain administrative or reporting tasks. Some of the permissions can be granted to a user but further controlled by specifying a group that the permissions are limited to. For example, one common permission granted to a supervisor is the ability to run reports. However, you may only want that person to be able to see the records of users that they supervise (as opposed to being able to see the records for the entire user population).
For this type of permission control, you could setup groups based on reporting lines and then use these groups when granting permissions. There are other permissions as well where this control is useful. For example, there are several permissions related to user administration where you can restrict the scope of the permission to apply to only a specific group(s) of users.
4. **Report Filtering:** When running reports, there will be occasions where you would like to restrict the users in the report based on a certain criteria. The use of Groups is a powerful and easy way to do this.

The Strategy behind Creating Groups

As mentioned in the previous section, there are four functional areas of Inquisiq R3™ that are controlled by groups. Each area will have its own criteria and strategy for how you will want to organize and define your groups to best accomplish your goals. The important thing to remember is that you will likely want to have four sets of groups that are each designed for a specific purpose. For example, one set of groups may be created specifically to control course enrollments. It is therefore likely that these groups could closely follow job titles or areas of knowledge and

expertise. On the other hand, you may also want to establish a set of groups that can be used to control who appears in different reports. These groups could follow your organization's structure. The same is perhaps true for the groups you may use to refine the scope of your permissions.

Creating Groups

To create a new group, go to the **Groups** section (Administrator Menu > Users & Groups). The **Groups** section will display a list of the existing groups. To add a new group, click the 'New Group' icon located in the upper-right portion of the screen and enter the name of your new group. Once you enter the new group's name, click the 'Save Changes' button, which will then take you to the Group properties screen where you can add users to your group.

To add users, click the 'Add Users' link (green plus sign under the members list). This will display a new window with a list of Users that are in the system but not currently in the group. You can select any user from the list that you want added to the group. Note that you can hold down the 'Ctrl' keyboard button to select multiple users from the list. Once you are finished making your selections, click the OK button to add the selected users to the group. Note that you may need to click the refresh control on your browser to refresh the screen to see the newly added users.

Grouping Rules

Grouping Rules can be created to automatically put users in different groups based on their user account data (profile). The Grouping Rules function can also create a group on the fly if desired. An example of a Grouping Rule would be one that automatically places a user in a group based on their job code or division. Of course, once in the group, the user will automatically be enrolled in any courses that the group has been enrolled into. By using grouping rules and group enrollments you can effectively automate the enrollment process completely.

Grouping Rules are explained in detail in the **Inquisiq R3™ Admin - System & Interface Configuration Manual**.

Modifying a Group

To make any change to a group, which could include changing the membership of the group, go to the **Groups** section (Administrator Menu > Users & Groups). The **Groups** section will display a list of groups in the system. Click the 'Modify' icon (pencil) to display the properties screen of the Group that you would like to change. The Group properties screen will list all of the current members of the Group. Under the list will be two buttons, one to Add Users and one to Remove Users.

- **To add users to the group** – click the 'Add Users' link to display a list of users in the system. Select all of the users that you would like to add and click OK. Once the users are added to the group you will be prompted to add more or select Done.
- **To remove users from the group** – click the 'Remove Users' link to display a list of user that are currently in the group. Select any users you want to remove by clicking and highlighting their name in the list, then click OK. Once the users are removed from the group you will be prompted to either select more users or select Done.

Enrolling Group in Courses

Another powerful feature of Inquisiq R3™ is the ability to enroll a group in a set of courses. Doing so will cause the system to automatically cascade the group enrollment down to all the users in the group, even if a user is added at a later date. Once a user is added to the group, they will automatically inherit all the enrollments for that group. Group enrollments therefore allow you to create groups, for example, that are based on training requirements and automate the entire course enrollment process. Also note that by using Grouping Rules you can also place users into groups automatically based on their account information or profile.

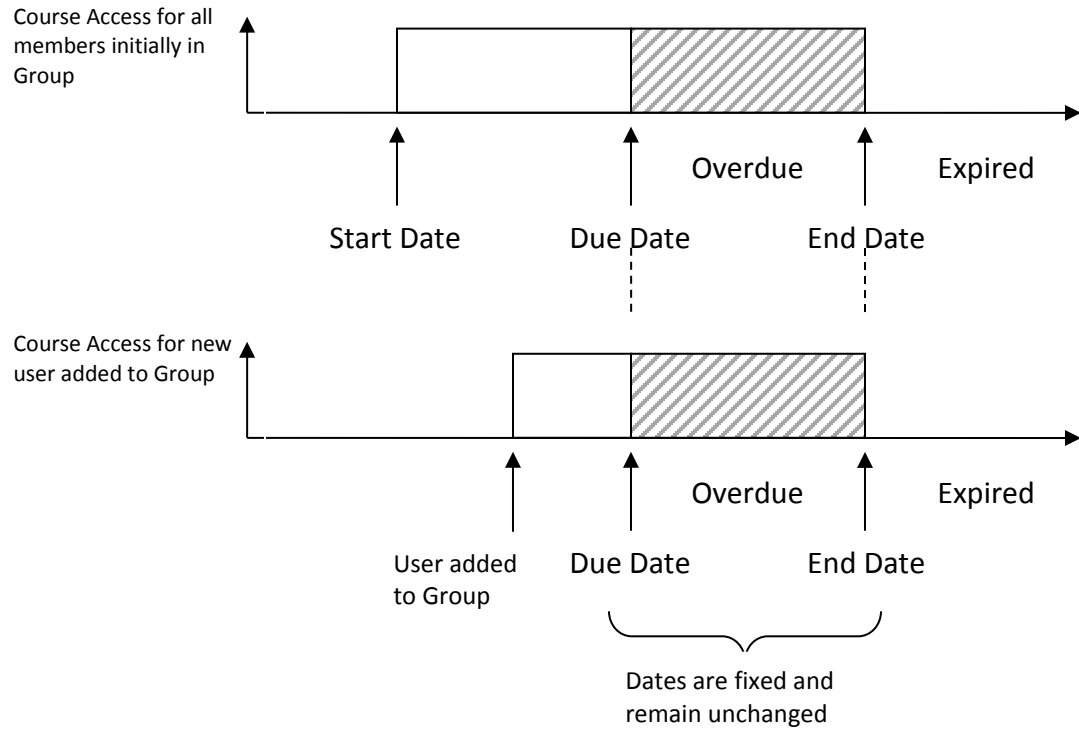
Group enrollments, like regular user enrollments, essentially have two types; “one-time enrollments” and “recurring enrollments”. However, group enrollments have one other important feature not applicable to regular user enrollments – specifically, how you want the enrollment dates to be defined in the case where a user is added to a group after the initial user enrollments.

For example, let’s say you create a group enrollment that starts on Jan 1 with a due date of 6 months after the enrollment. All the people who are in the group at the time of the enrollment will therefore have a due date of July 1 (Jan 1 + 6 months). However, what should happen to someone who is added to the group at a later date, like May 1? Do you want to give them 6 months to complete the course like everyone else, or do you want the new person to be synchronized to the rest of the group and have a due date of July 1 (essentially only giving them 1 month to complete the course). To allow you to specify your preference, you can select either the *Fixed Dates* or *Relative Dates* type of group enrollment. If you choose the Fixed dates type then everyone in the group, no matter when they were added to the group, will be synchronized and all have the same Start and Due dates. Alternatively, if you select the Relative dates type, then the Start and Due dates will be relative to when the user is added to the group.

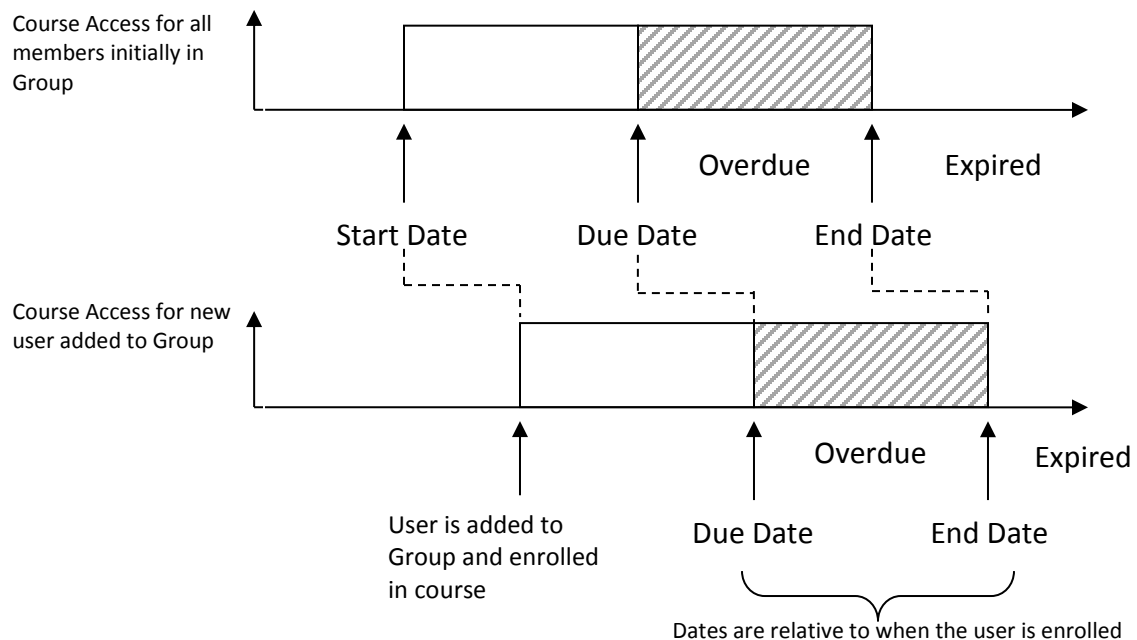
You can also create delayed relative enrollments (for both one-time and recurring) by specifying the amount of time for a delay in the field provided. This, for example, could provide a grace period in which a user could be added to the system but would not have a course’s start date apply to them for a certain period of time. For example, new employees might be given a grace period of 30 days to get oriented before they need to start taking their recurring courses. Essentially when there is a delay, all the dates (start, due, and access) are effectively pushed forward the amount of time specified in the delay field. For recurring enrollments, the occurrences after the initial one inherit a start date relative to the effective start date of the first occurrence (i.e. the start date plus any delay specified). For example, if a start date is specified as July 1, and a delay of 1 month is specified, and a repeats every 1 year is specified, the 2nd occurrence’s start date would be on August 1st of the following year.

The four types of group enrollments are listed below along with a diagram that shows the different dates and configuration parameters associated with each type of group enrollment.

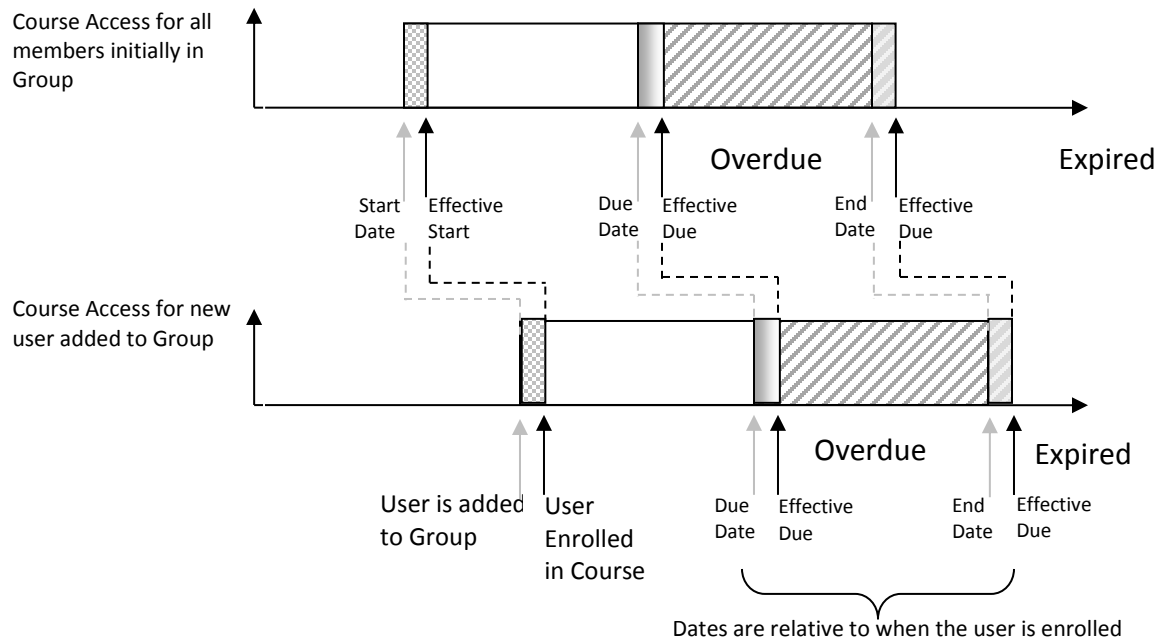
1. One-Time Enrollment with Fixed Dates



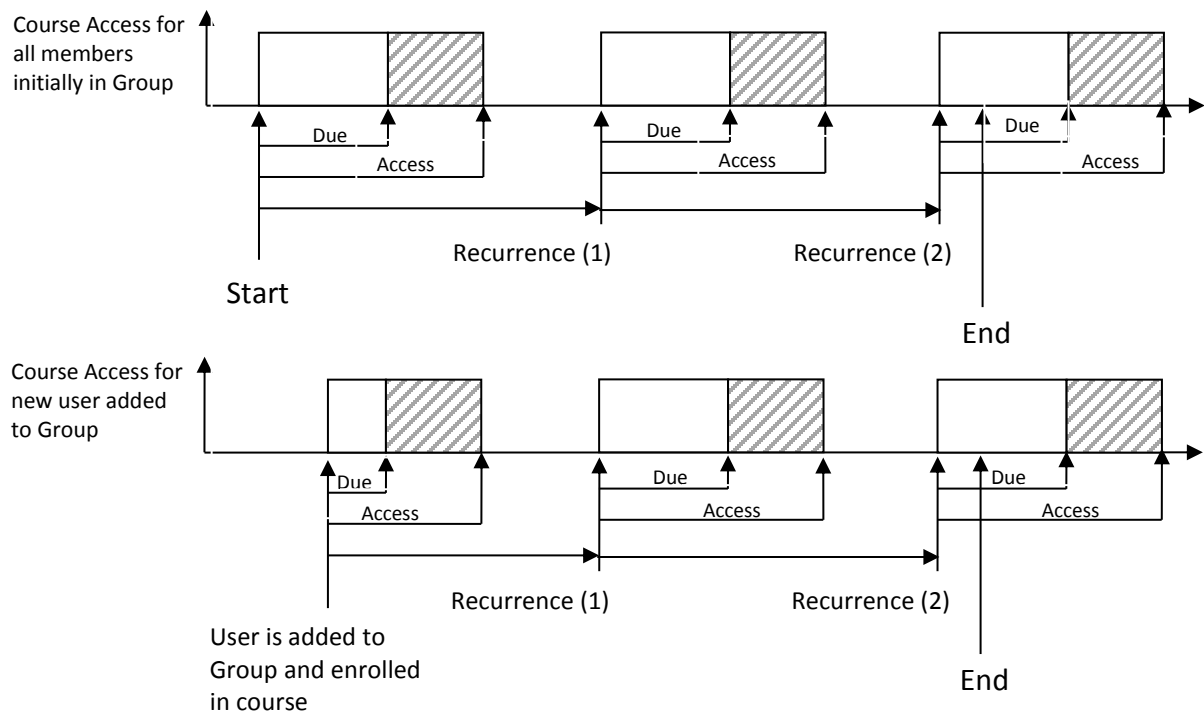
2. One-Time Enrollment with Relative Dates



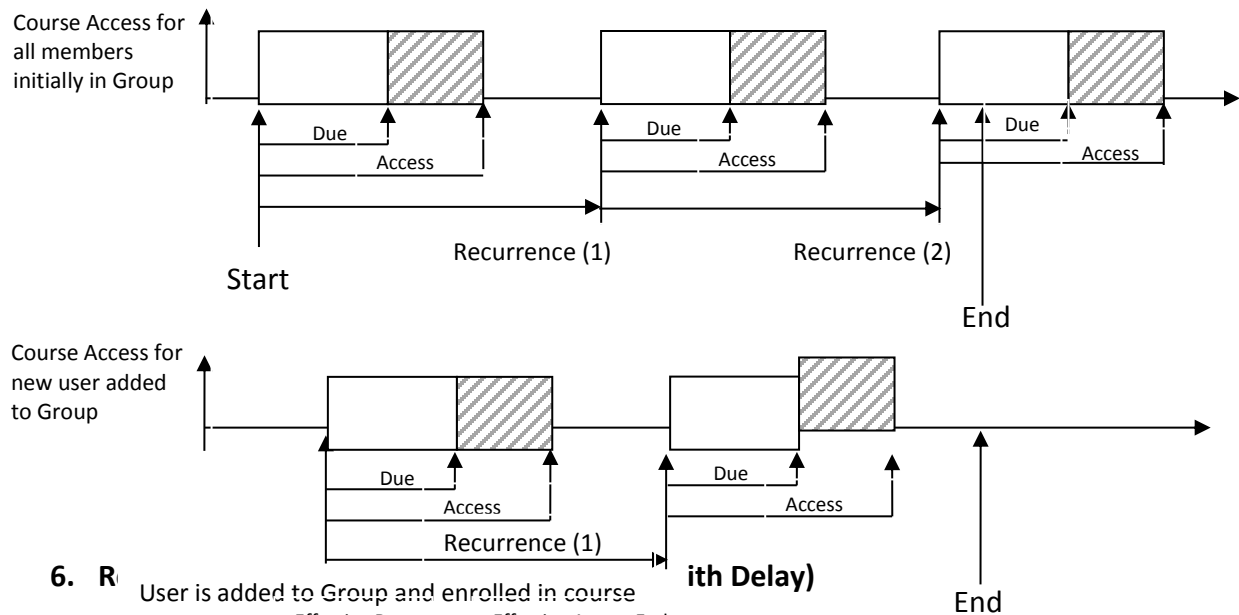
3. One-Time Enrollment with Relative Dates (with Delay)



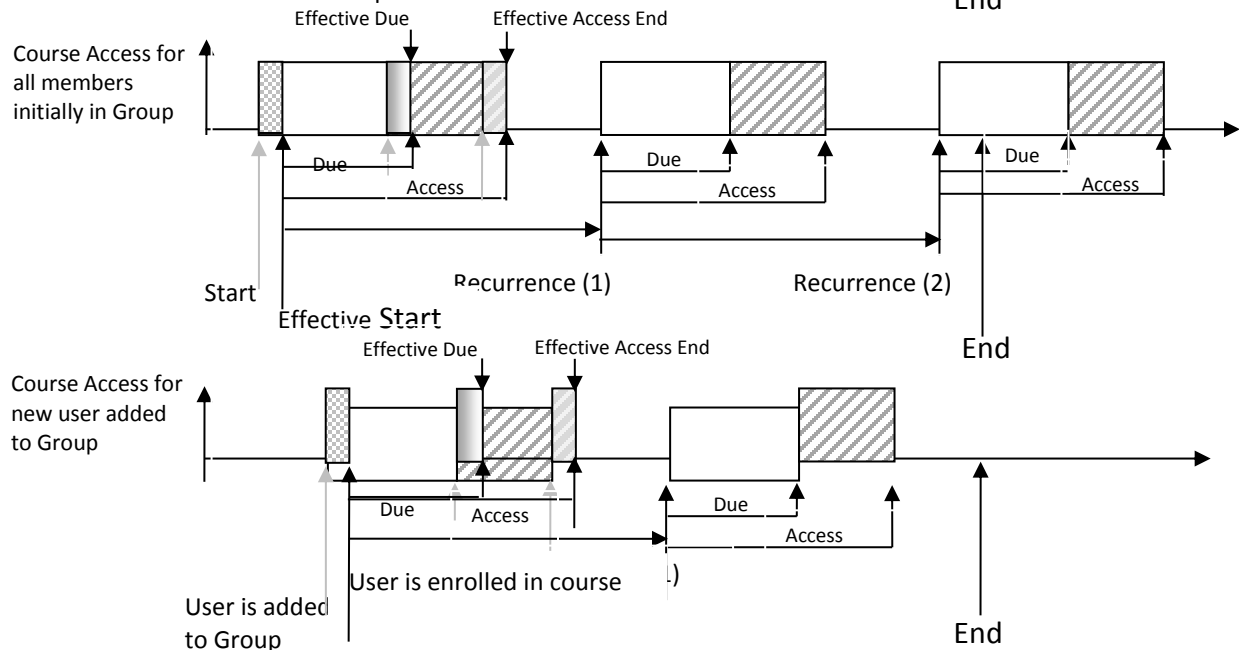
4. Recurring Enrollment with Fixed Dates



5. Recurring Enrollment with Relative Dates



6. R User is added to Group and enrolled in course



Granting / Revoking Private Catalog Access – Groups

In many cases you may desire Catalogs to be private. First, create a catalog and designate it as Private. The process for doing this is explained in the **Inquisiq R3™ Admin - Content Manual**. Once you have private or restricted catalogs setup, only users that have been specifically granted access will be able to see and open them. This permission can be granted either on an individual basis or on a group basis.

To provide a specific group access to private or restricted catalogs, go to the **Groups** section (Administrator Menu > Users & Groups). Click the 'Modify' icon (pencil) for the specific group

and, once on the group's properties screen, click the 'Private Catalog Access' icon in the upper-right Tools area. The **Private Catalog Access** section will display a list of catalogs in the system. All of the regular, non-restricted, catalogs will have checkboxes in front of them that are checked, meaning the group being modified – and thus all the users in that group – automatically has access to those catalogs since they are not private. The private catalogs will have an empty checkbox in front of them. Click the box of a private catalog to add a check mark which will then grant the user access to that private catalog. Once you have selected all the private catalogs that this user should have access to, click the 'Save Changes' button for the changes to take effect.

Setting Permissions

(To set permissions you must be logged in as the Master Administrator. See the R3 Master Administrator & Overview Manual for details on setting user permissions.)

Deleting All Users in Groups

In some cases there may be a need to remove large numbers of users. For these scenarios, there is a Delete All Users in Group tool that does just that – removing every user who is a member of that group, regardless of what other group memberships they may hold. Used in conjunction with grouping rules, one could assign multiple users to a group based on a specific data field or fields, and then delete those grouped users with the Delete All Users in Group tool.

Deleting Groups

To delete a group (but without deleting the members of that group), go to the **Groups** section (Administrator Menu > Users & Groups) to display a list of the groups in the system. Any group in the list can be deleted by selecting the check box on the left-most portion of the group list and then clicking the 'Delete Selected' icon located below the group list.

Again, when you delete a group in this manner you are NOT deleting any of the user in the group. You are simply removing the group itself.

However, when you delete a group there are other ramifications that you need to understand so as to avoid unexpected behavior:

1. Group enrollments will be removed if the group is deleted. For example, you create a group and enroll the group in a certain course. Then, everyone who is added to the group will inherit that course enrollment. Now, if you delete the group, then all the course enrollments that were created by the group enrollment will be removed and will no longer appear in the users enrolled courses on their **My Account** screen.
2. Grouping rules will potentially be affected. If you delete a group that was used in a grouping rule then you should review and possibly modify the rule to make sure it works the way you intend.

Import Activity Data

Overview

Inquisiq R3™ allows you to import historic course completion data for users who have taken courses outside of the Inquisiq R3™ LMS. This is especially useful for courses that were not initially managed within Inquisiq R3™ but for which course completion data (including credits) for a user needs to be maintained for user transcript and reporting purposes.

The use of this feature requires you to be logged in as the Master Administrator or a user with the User Manager permission. The **Import Activity Data** section can be accessed from the User Panel located on the right side of a user's information in the **Users** section, or directly from the **Administrator Menu** in the **Users & Groups** section.

Note that when you access the **Import Activity Data** section from the **Users** section, you will only be able to import data for a specific user. When you access the **Import Activity Data** section from the **Administrator Menu**, you will be able to import data for multiple users.

Import File

In order to import activity data, you need to construct a tab-delimited file with the file extension ".txt". Please make sure there are no empty lines at the end of the file and no column headers. Field data should not be within quotations (""), and there should be no tabs within the data other than what is being used to delimit the fields. An easy way to create such a file would be with a spreadsheet application such as Microsoft Excel, as you can easily lay out columns and rows according to the specifications, and then just export it as a tab-separated file.

The screenshot shows the 'Import Activity Data' interface. On the left, a table lists the required fields for the import file:

Column	Field	Required	Type	Length	Format
Column A	Username	YES	Text	255	
Column B	Course Code	YES	Text	255	
Column C	Course Name	YES	Text	255	
Column D	Course Completion Date	YES	DateTime	-	DD-MM-YY (e.g., 14-03-08)
Column E	Lesson Name	YES	Text	255	
Column F	Lesson Completion Status	YES	Text	10	completed/complete/unknown
Column G	Lesson Success	YES	Text	1	passed/failed/unknown
Column H	Lesson Score	NO	Number	5	0 - 100
Column I	Lesson Activity Timestamp	YES	DateTime	-	DD-MM-YY (e.g., 14-03-08)
Column J	ROW END	NO	Text	-	Enter 'END' in the column to indicate the end of the row.

Below the table, there are two footnotes:

(1) If a course code is entered, the import will try to match the course code to a course that currently exists in the system. Matching a course code to a course in the system allows credit to be assigned for that course. When course code is left blank, the completion record is for reporting only.

(2) If all columns E, F, G, H, or I contain data, then all columns E, F, G, and I must contain data.

On the right, a sidebar titled 'ACTIONS' contains the 'Upload Activity Data' button. Below it, an 'IMPORTANT!' section lists key instructions: 'The Username column will be used to identify the users you are uploading the activity data for. If a username in the column doesn't match a username within the system, the import will fail.', 'Your data will be related against all the data types and formats specified in the table. You should be sure your data is complete with these rules.', 'A maximum of 10,000 records can be uploaded in any activity data export. If your activity data import file contains more than 10,000 records, please separate it into multiple files.', and 'Columns not in table: Required - YES indicates that all rows must contain data in this column. Otherwise, your file will not be processed. The requirement will be validated.', 'Length - The maximum number of characters that the database will allow for the column. Verify that your column has the appropriate data length. This is for information only and will not be validated. Be sure to review your configuration.', and 'Format - Specifies formatting information for the column.'

At the bottom of the sidebar, an 'IMPORTANT FORMATTING NOTE!' states: 'Note the following before creating your'.

Columns to include are listed in the initial Import Activity Data screen/tab "Upload Activity Data." There are up to ten data fields you can import, but only four of the fields are required, including a "Row End" field at the end of each record/row/line. If any of the fields concerning Lesson data are included, all such fields must be included.

Matching Data

In order for the import to succeed, you must match the username column with a user in the system. Also, in order to assign credit for a given course, the course code must match one of the courses already in the system, otherwise no credit will be rewarded and the activity will simply be for user transcript and reporting purposes.

Data Validation

Please make note of the data validation listed on the initial screen of upload instructions. The data type (text vs. number vs.

The screenshot shows a data validation interface. At the top, there is a navigation bar with 'Page 1 of 1', '< Previous Page', and 'Next Page >'. Below this is a table with two columns: 'Import Date/Time' and a checkbox. The first row shows a green checkmark in the checkbox and the date '7/1/2011 3:38:27 PM'. At the bottom, there is a red 'X' icon and the text 'Destroy Data for Selected Activity Imports'.

date/time), the length, and the format must coincide with the specifications for each column or the import will fail. Additionally, a maximum of 10,000 records/rows can be imported at one time. If you need to import more than this, please separate the import into multiple files.

Manage Activity Data

Once you have imported activity data, you can easily remove this data from a user's record by selecting the Manage Activity Data Tab in Administrator Menu > Import Activity Data. This is useful when initial activity data is imported, but subsequently more detailed (or corrected) data becomes available. The old imported data can be removed, and then the new data can be re-imported.

Note that the access of the **Manage Activity Data** section requires you to be logged in as the Master Administrator.

<http://forums.adobe.com/message/5119718>