learning your way

informetica

Campus Admin

Revision 14-4

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1. Introduction

Informetica is a web-based Learning Content Management System designed to provide functionality that is easily accessible without needing to install software. The robust system allows users of any computer competence to easily perform the tasks needed.

Topics Covered in this Chapter

The Informetica LCMS was built with the end-user in mind, for user-friendliness and ease of access forefront in its architecture. First time users can easily navigate through self-registration, online training and personal account management.

Because the Informetica system can be used in a number of ways, generic terms or titles are used throughout this manual, such as "participant" rather than "student" or "products" rather than "courses".

This manual may reference features that do not apply to your Informetica system and features may be named differently due to customizations specific to your site. Additionally, some systems have customizations they may not be covered in this manual. Please keep in mind that Informetica itself is under constant development and some differences between the live application and this manual may occur.

1.1.1 Disclaimers

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1.1.2 Restrictions

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1.2 System and Browser Requirements

Informetica is accessible via any platform with internet access and requires a minimum of 56 Kbps connection speed. No third party programs are required to access Informetica. However, course content, such as flash files, may require 3rd party plugins to view. It is recommended that you view Informetica using a current web browser that has JavaScript enabled. Informetica always tests system upgrades and client content on the most current version of a web browser.

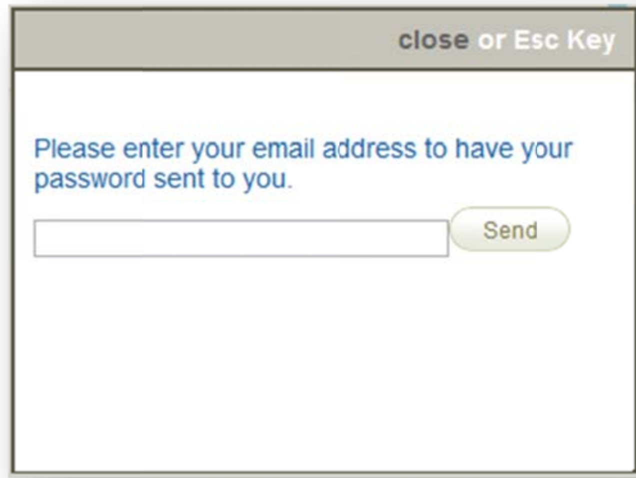
1.3 Supported File Formats

Informetica supports all standard web based media formats, as well Microsoft office suite file formats and Adobe PDF. Other supported formats include SCORM, AICCS and Engage packages. A detailed list of supported file formats is shown below. Your specific set up may have different options depending on your needs.

Images	bmp, gif, jpeg, .jpg, pcx, png, psd, tif, tiff
Documents	doc, docx, csv, htm, pdf, ppt, pptx, rtf, txt, wpd, xls, xlsx, xml, zip
Templates	htm, html
Audio/Video	avi, m1v, m4v, mid, midi, mov, mp3, mp4, mpeg, mpg ,sfw, wav, wmv

Login Page

Once reaching the Informetica website set up for your organization, users will be required to use a login and password to access the content. Informetica offers a single, secure login page. Entering your registered email address and the password you chose during registration will grant you access to the system.



Forgotten Password

If you have forgotten your password, click the “Forgot Your Password?” link on the login page to access the password retrieval form. Enter your assigned user name and click the Send button. Your password will be sent to the email address that is associated with your user account.

1.4 Selecting Items in Informetica

The tab on the right side of the Item Information Box has three different states: Selected, Not Selected, Hover. The examples below show the Organizations in Detailed View. List View selections are similar, however there is not tab; only the line entry will change colour.

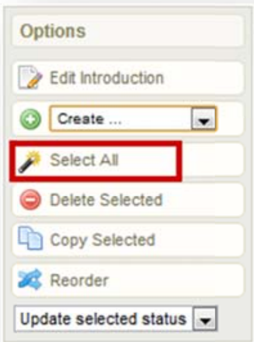
Selected – The tab on this organization is light blue with a checkmark. To deselect this organization click anywhere on the box. The tab will change to a light gold color to show that it isn't selected.

Not Selected – The tab on this organization is light gold showing that the item is not selected. To select this item, click anywhere on the box. The tab will change to a light blue color with a checkmark to show that it is selected.

Hover – When an organization is not selected it will change to a dark blue tab when you move the mouse over it that says "Select" with a checkmark. Click anywhere on the box to select this organization.

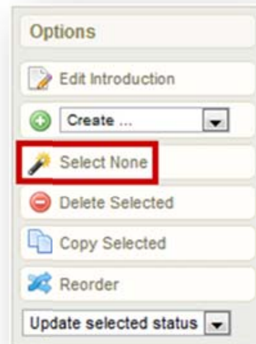
Select All Items

Click on Select All in the Options section of the sidebar. When all items are selected, the Select All option becomes Select None.



Deselect All Items

Click on Select All in the Options section of the sidebar. When all items are selected, the Select All option becomes Select None.

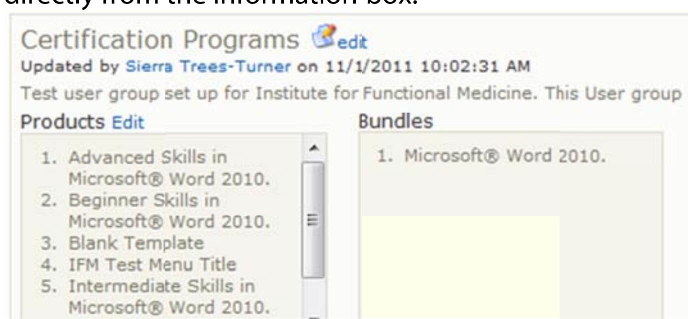


1.5 List and Detailed Views

There are two ways to view most lists in Informetica (such as user groups and products): List View or Detailed View. The instructions in this manual are usually shown using the detailed view.

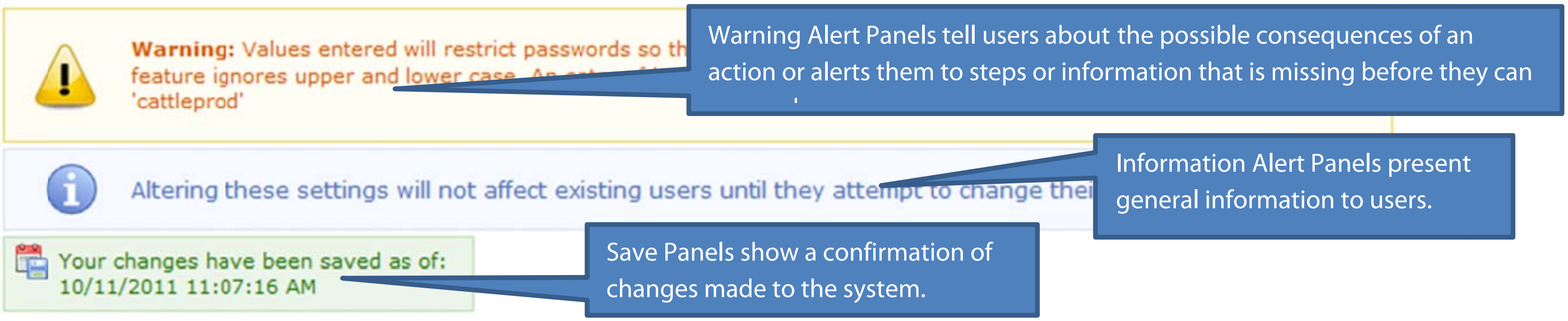
List View displays your organizations in rows so you can view many at once. Edit details or delete options are generally available via additional menus on the right.

Detailed View displays more information about each item in the information box and generally gives the ability edit details or delete directly from the information box.



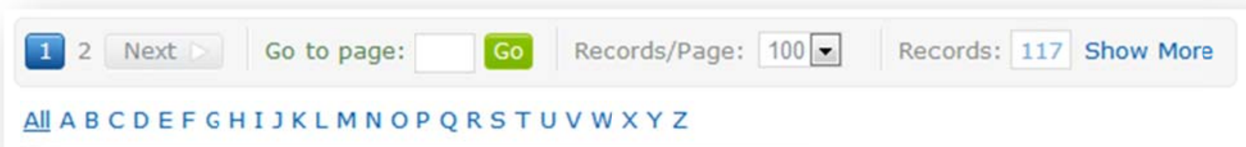
1.6 Alert Panels

Alert Panels are used throughout Informetica to convey a message or warning to users when using features within the LCMS.



1.7 Pagination

Page with long lists have pagination on the top and bottom of the page to help you navigate through the lists.



The page navigation bar lets you click a page number , go directly to a specificpage number and may reflect the number of records.

The alpha filter bar lets you click any letter to filter to see only the records that start with the letter selected. IN the case of lists with user names, this will be the user's last name.

1.8 What is an Organization?

An organization is a way of grouping user groups, products, access codes, and bundles together. Informetica must have at least one organization set up to manage users. The cornerstone of setting up Informetica's Learning Content Management System is the ability to create and manage multiple, distinct groups of users, and the ability for each organization or campus to have a fair measure of its own administrative abilities. To create this environment, a site manager has created at least one organization that corresponds to a broad based area, region or separate company/campus.

1.9 What is a Product?

Products house a collection of items (assets) and related media used to teach participants on a specific subject matter. Informetica allows clients to have five different product types at a time, each with their own unique capabilities. Note that products may be customized for your system and named differently than the default names listed in this manual. Here are some examples of product types our clients are using within Informetica: course, solution, eLearning, instructor led course, job listing, trials, project, eTraining, policy or procedure, documentation, professional development, how-to article, feature article, quiz. Products can be created by site managers, campus admins and publishers. The products menu on the left hand side of the home page lists all of the products your Instructor account is registered to. In this example the menu is called courses. Here is a legend to the Products Menu:

Products that have a strikethrough are not available to participants and are not seen when they log into Informetica. Changing a product's status to inactive will make it unavailable to participants as will changing the publishing date.

Products that show up in **teal** have completion rules assigned to them and are incomplete.

Products that show up in ***green italics*** have completion rules assigned to them and are complete.

Names with a plus symbol next to them indicate that they are bundled products. Press the plus symbol to open the list of individual products within the bundle.

1.10 What is an Asset?

Assets are the individual elements that make up your entire product, each with unique features. Assets can be created by site managers, campus admins and publishers. Note that assets may be customized for your system and named differently than the default names listed in this manual.

1.11 User Types

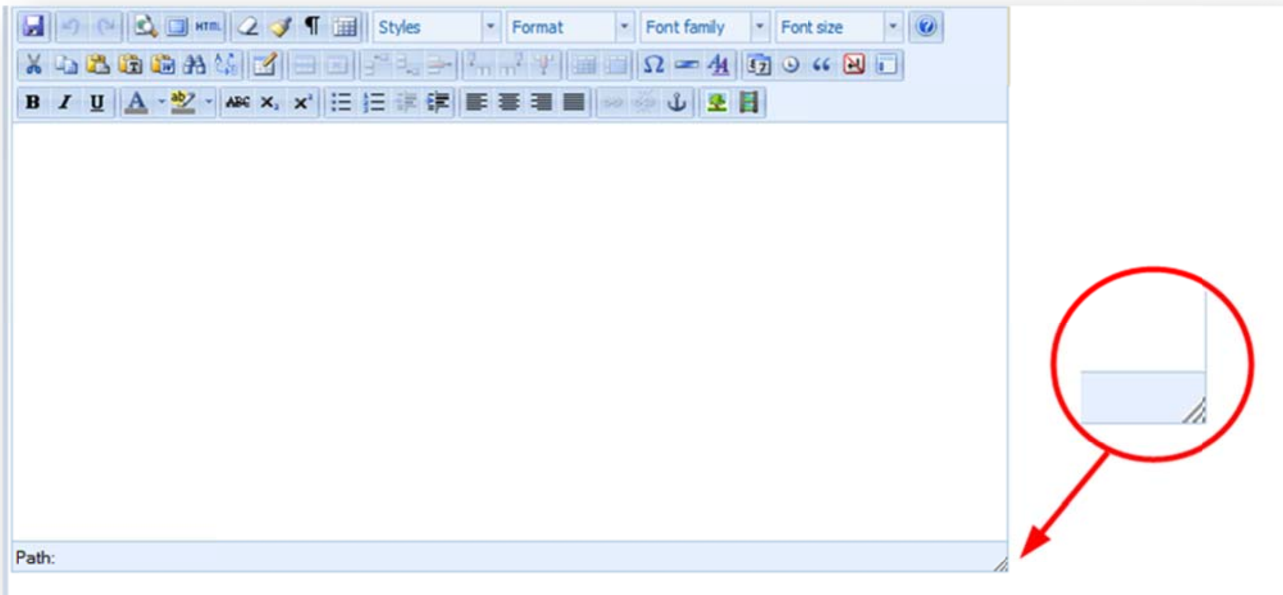
The Informetica system has a number of default user types to allow for accounts with varying levels of access and permissions. Some account types have configurations which may modify their respective permissions to meet your specific needs. Below is a short description of the major types.
Site Manager: the only user type to have access to the Informetica administration modules and support team. They have the tools to create and manage your entire online training environment;
Campus admin: has the same user access as publisher and instructor accounts coupled with additional administrative access rights of an organization manager, based on your needs;
Organization/Campus Manager: can access all the user groups that fall under their organization(s), create and manage users and user groups, upload mass groups of users via the Informetica import tool toward user creation and/or training registration and they can assign training to individual or multiple users;
User Group Manager: able to obtain records and reports on users within the groups that are under their supervision;
Publisher: is able to create learning materials within the system, such as courses, exams and modules. Publishers can also upload 3rd party courseware (SCORM/AICC) and upload a number of file formats such as PowerPoint presentations, PDFs, excel spreadsheets, word documents, flash presentations and a number of others. A publisher is able to access participant records and other reports, based on the user group(s) to which they belong;
Instructor: is able to facilitate a course and view all applicable students' records and reports but, unlike a publisher, a trainer does not have the 'rights' to modify any of the course assets. They are able to approve users for pending registrations, as well as grade their users;
Participant: the learner taking the course or training. The participant has no administrative abilities.

1.12 Informetica's Content Editor

Informetica's Content Editor utilizes a WYSIWYG (What You See is What You Get) editor to make it as easy as possible for non-technical managers and instructors to edit content. With our editor, you can format text, insert media files such as video and photos, add hyperlinks, paste existing content from Microsoft Word, insert tables, insert CSS, add templates and more using familiar tools that are found in most office productivity programs. If you prefer working in code view, simply click the Edit HTML Source button to open the source editor. See the end of this manual for a description of each of the publishing tools.

Resizing the Publishing Window

You can easily increase or decrease the height and width of the publishing window by clicking and dragging the bottom right corner of the window.



1.13 Spellchecker

A spellchecker  is available in all publishing windows. To use the spellchecker you must toggle the spellchecker button on, located at the top of any publishing window. If a word is spelled incorrectly, a squiggly red line will show up under the word. Click the word to bring up a list of suggestions for the correct spelling or to ignore the misspelling.

2. Home Page

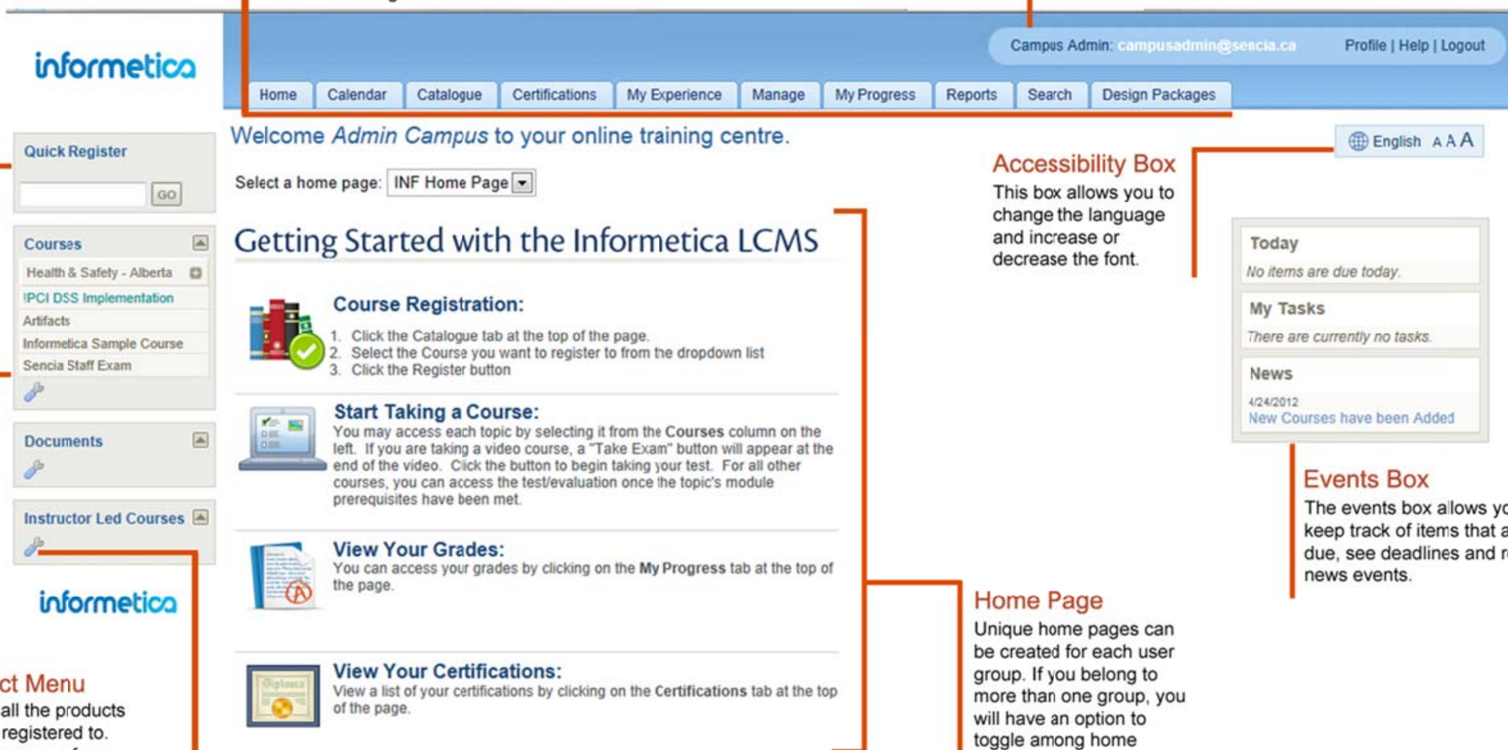
Site managers can create a unique homepage for each group of users or share homepages among groups. After the user logs in, they will see their homepage, a list of the training items they are registered to and have easy access to things such as transcripts, training progress and more. If your organization has several user groups that use custom home pages, then you may have a selection of home pages that you can view. The content on this page is what all desktop users see, with the exception of Manage and Reports tabs and the wrench icon where you will access most publishing and instructor tools. Much of the content on this page can be designed by a course creator. This could be a site manager, campus admin or publisher.

Topics Covered in this Chapter

Quick Register
This field is used to enter an access code that will automatically register you to a specific product.

Main Navigation
All sections of the system are accessible through these tabs.

Information Bar
Change your password, view the user help manual or logout from the information bar.



Accessibility Box
This box allows you to change the language and increase or decrease the font.

Events Box
The events box allows you to keep track of items that are due, see deadlines and read news events.

Home Page
Unique home pages can be created for each user group. If you belong to more than one group, you will have an option to toggle among home pages.

Product Menu
A list of all the products you are registered to. Click the name of any product to launch it.

Edit Tool
Used to edit product names, content, availabilty and status.

2.1 Main Navigation

All sections of the system are accessible through the Main Navigation tabs at the top. You have access to your own transcripts, and can work through Products just as a Participant user can. For more information in these areas, please see the Participant Manual.

Home: This tab will always return you to the home page.

Calendar: This tab will take you to the calendar where you can view or add personal tasks.

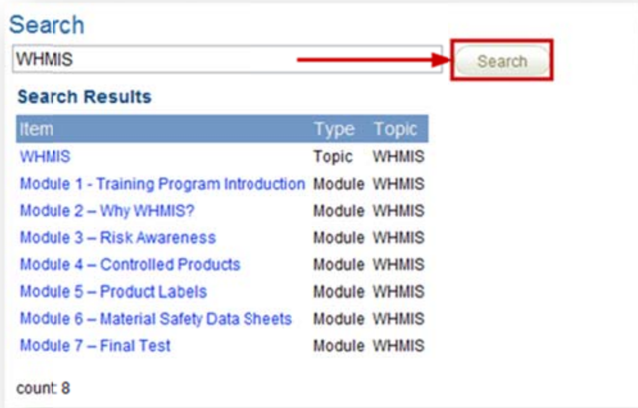
Catalogue: If available, this tab contains a list of Products (courses) that are available for participants.

Manage: Gives you access to the manager tools.

Reports: Click this tab to run available preset reports.

Transcript or My Progress: Only one will be available. Transcript will show you passing and failing grades as well as incomplete attempts for every Product (course) you are registered to. My Progress contains the same information as transcript as well as certification information progress, if applicable.

Search: This tab allows you to enter simple search terms to look for something in the system. The returned results are also links that you can click to go directly to the item.



2.2 Information Bar

Displays your user login status and contains the following links:

Profile: Click this link to update your account information and password.
Help: Click this link to open a copy of this manual.
Logout: Click this link instead of simply closing the browser window to ensure that any changes you have made will be saved and that your session will be properly recorded
Quick Register
If available, this field is used to enter an access code that can automatically register you to specific products.

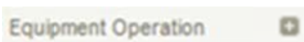
2.3 Product Menu

The product menu on the left is an interactive list that lets you launch any products that you are registered to. Simply click the name of any product to begin. You can hide or show this menu by clicking the triangle at the top of the menu. Here is a guide to some of the colours and symbols you may see on this menu:

Products that have a strikethrough are not available to participants and are not seen when they log into Informetica. They can be edited by publishers. Changing a product's status to inactive will make it unavailable to participants.

Products that show up in **teal** have completion rules assigned to them and that have not yet been finished.

Products that show up in ***green italics*** have completion rules assigned to them that have been finished. For example, there may be two exams in the product that must be passed for the product is considered complete.



Items in the list with a plus symbol before the name are courses that are bundled together. Click the plus symbol to expand the list. Click it again to re-collapse the list.

Items in the list with an exclamation before the name are courses that have been granted an extension.

2.4 Accessibility Box

This box allows you to change the language and the size of the font on the page.

English: Click 

to change the language you view the page in if multiple languages are in use by your system.

aAA: Click 

to change the font size you view the page in. Click the leftmost A to view in the smallest font and the right most A to view in the largest font.

Page Link: 

Systems configured with this option can create a direct URL link to any Informetica page and sent to other users. Clicking the link will be prompt users to login and they will be directed to the destination page or will see a message if do not have access to the destination page.

Edit: If your LMS is configured for this option, campus admins may also have the ability to edit their homepages.

2.5 Events Box

The events box allows you to keep track of items that are due, see deadlines and read news events. It is typically used as a way to send global messages to all users on the system and to allow participants to keep track deadlines and tasks. Note that not all three items in the example of the events box may be in use on your system.

Today: This area shows any items that are due on the current day. This includes automated deadlines.

My Tasks: This area shows self-created tasks entered from the calendar tab.

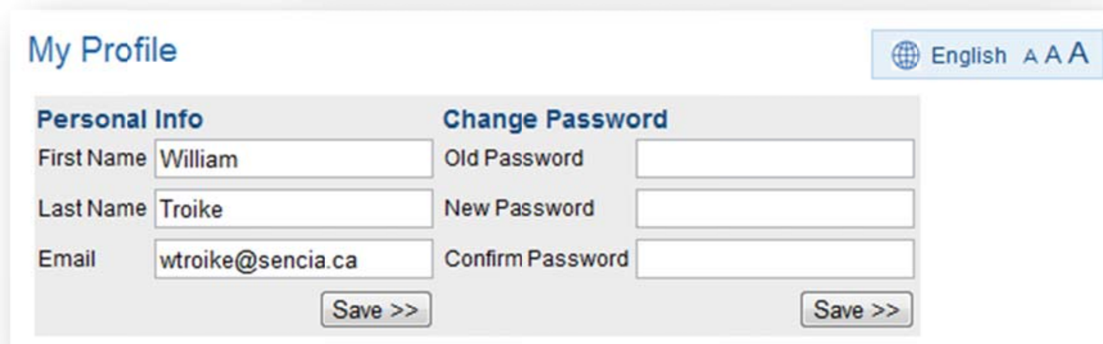
News: These news items are events set up by site managers.

2.6 Publisher Tool

The wrench icon is used throughout the system to give you access to publisher tools. This includes editing product names, availability and status as well as access to product authoring and editing abilities.

2.7 Change Password or Profile Information

You can access your user profile at any time by clicking on Profile next to your name in the Status Panel. Make changes to your Personal Info or Change Password and then click the Save button to keep the changes. This information can be viewed by site managers and instructors.



3. User Accounts

Informetica provides unparalleled user creation and management. The system gives you the flexibility to create individual user accounts, upload accounts en masse, place users in groups, assign access rights, and much more.

Topics Covered in this Chapter

3.1 User Types and Permissions

The Informetica system has a number of default user types to allow for accounts with varying levels of access and permissions. Note that some systems have custom user types and configurations which may modify their default permissions to meet your specific needs.

3.1.1 Site Manager

The site manager accesses the administration side of Informetica where they can create campuses, user groups, course topics, certification tracks (including rules) and assign different user types to users. For example, the site manager can provide a user with publisher access to author a specific course or courses. This way, multiple publishers can be assigned to the system to create courses for a campus. Course assets include: modules, assignments, references, tests, assessments, certifications and more. Refer below for the user types that a site manager can create.

3.1.2 Campus Admin

Desktop managers have the combined permissions of publishers, instructors, and campus managers, including reports for campuses which they manage.

3.1.3 Campus Manager

A campus manager can access all the user groups within their assigned campuses and may obtain reports on all users within those user groups. Campus managers are able to create and manage users and user groups, upload mass groups of users toward user creation and/or product registration and they can assign training to individual or multiple users. Below is a list of rights that may be present for campus managers, depending on your site's configuration.

1. Users
    a. View users by various filters, create, activate and deactivate users and register users via access codes.
    b. View a user's transcript to see a list of the products they are registered to as well as which gradable assets they have attempted/not yet attempted the number of attempts and the grades received for each.
    c. Add or remove the user groups a user is assigned to.
    d. See which products a specific user is registered to as well as when or if they have completed them.
    e. Grant additional access to a course or a course item. This is usually used for a testing asset such as an evaluation or assessment.
    f. See a list of any access codes that have been used either by the user or by a manager on the user's behalf.
    g. See details on evaluations and assessments the user is registered to.
    h. View a listing of all certifications the selected user has already obtained, is working toward or has qualified for.
2. Access Codes: Create new codes, view detailed debit information, edit, activate and deactivate access codes.

3. Subscriptions: View and purchase subscriptions
4. Curriculum: View current curriculum, create, edit, activate and deactivate curriculum.
5. Classifications (Used with the curriculum feature): View current classifications, create, edit, activate and deactivate classifications.
6. Discipline: View current disciplines, manage campuses, create or delete disciplines.
7. Import: Import users, user certifications and user product registrations from an Excel spreadsheet.User Group Manager

When a user group manager logs into the system, they are able to obtain reports on users within their user group(s) that are under their supervision. The reports they select can show a user's activity, grades, and the IP address they used when going into the system. When viewing a student's activity, the user group manager is able to see what areas of the course the student looked at, the amount of time he/she looked at each area, and their grades. The site manager can provide user group managers with access to more than one user group, if needed.

3.1.4 Publisher

The publisher is able to create course material within the system, as well as exams and assessments. Courses from other providers can also be uploaded into the system. Tools to upload a number of file formats are available such as PowerPoint presentations, PDFs, excel spreadsheets, word documents, flash presentations and a number of others. A publisher is able to access participant records and other reports, based on the user group(s) to which they belong.

3.1.5 Instructor

An Instructor is able to facilitate a course and view all applicable students' records and reports but, unlike a publisher, a trainer does not have the 'rights' to modify any of the course assets. They are able to approve users for pending registrations, as well as grade their users.

3.1.6 Participant

A participant is the learner or student taking the course. Participants may access their assigned training, a list of courses available for registration, a list of in progress and earned certifications, a transcript, a calendar, forums, activity log, a roster, and a task list. Access to many of these options will be dependent on the configuration of your Informetica system. In the corporate market, a participant is often that company's employee. The flexibility of the Informetica system enables campuses to use it as a collaboration and communication tool for specific user groups. For example, senior board members are able to select their committee name under the menu in order to obtain key documents and share ideas.

3.1.7 Certificate Issuer

As users complete the requirements of a certification, they may receive an official certificate through the mail. The certificate issuer user type exists to easily compile a list of earned certifications, and user mailing addresses. Informetica will also track a certification sent date to indicate the date the certification of completion was mailed to the user by the certificate issuer. For example, as a site manager, you can create a certificate name called

"First Aid 101 Certification". The rules that may apply are that users must pass four course exams by obtaining a mark of no less than 80%. The exam titles might be: Severe Bleeding, Cardiovascular Emergencies, Wound Care, and Burns. When a certificate issuer goes into the system, they can access reports to display names of those users that have achieved this certification in order for the certificates to be mailed. Reports are also available to show when certificates were issued and when they are up for renewal.

Alternatively, the site manager can create a certification that carries a user-printable certificate upon successful completion of the certification requirements. This user type is not used in configurations which provide digital certificates to be printed by the user.

3.1.8 Helpdesk User

A helpdesk user may access the account list of their respective campuses and user groups. From the account list, helpdesk users may have the ability to reset passwords, unlock accounts, grant exceptions, and view other profile information. The permissions of the helpdesk user will vary based on the configuration of your Informetica system.

3.1.9 Forum Expert

Informetica allows you to designate any user from any user type (even a participant) as the "Forum Expert". Through the forum utility users may post questions and/or comments for the expert and their colleagues to view and return comment upon; the forum expert is automatically e-mailed notification of the post to permit them to respond in their expert capacity. This user type may be created by a site manager or a publisher. This is especially useful when assignments/courses are being undertaken by a mixture of junior and senior staff.

3.1.10 Rep

The Rep is a user type with the same access as a participant, with the additional ability to run reports on other participants within their user groups.

3.1.11 User Roles and Permissions

LEGEND	
✔	Permission is standard for this user type
✓	Permission is optionally available for this user type
no	Permission is not available for this user type

USERS AND ACCOUNT MANAGEMENT Permission vs. Role	Site Manager	Campus Admin	Campus Manager	User Group Manager	Publisher	Instructor	Help Desk	Rep
Activate & Deactivate Users	✔	✓	✓	no	no	no	✔	no
Approve Experience Logs	no	✔	✔	✔	✔	✔	✔	no
Create User Accounts	✔	✓	✓	no	no	✔	no	no
Create/Manage User Groups	✔	✓	✓	no	no	no	✔	no
Create Administrative User Types	✔	no	no	no	no	no	no	no
Manage User Classifications	✔	✓	✓	✓	no	no	✓	no
Archive Users	✔	✓	✓	no	no	no	✓	no
Delete Users	✔	no	no	no	no	no	no	no
Edit and Delete Classifications	✔	✓	✓	no	no	no	no	no
Edit User Account Details & Passwords	✔	✓	✓	no	no	no	✔	no
Import Users from Excel	✔	✓	✓	no	no	no	no	no
Manage User Roles and Permissions	✔	no	no	no	no	no	no	no
View Archived Accounts	✔	no	no	no	no	no	✔	no
View User Certifications	✔	✓	✓	✔	✔	no	✔	no

ADMINISTRATIVE PERMISSIONS Permission vs. Role	Site Manager	Campus Admin	Campus Manager	User Group Manager	Publisher	Instructor	Help Desk	Rep
Create Campuses	✔	no	no	no	no	no	no	no
Create System Support Tickets	✔	no	no	no	no	no	no	no
Manage Security Features	✔	no	no	no	no	no	no	no
Manage e-Commerce Products	✔	no	no	no	no	no	no	no
Manage Language Dictionaries	✔	no	no	no	no	no	no	no
Run Reports	✔	✓	✓	✓	✓	✓	✔	✔
Set Up Automated Email notifications	✔	no	no	no	no	no	no	no

COURSEWARE AND FILE MANAGEMENT

Permission vs. Role	Site Manager	Campus Admin	Campus Manager	User Group Manager	Publisher	Instructor	Help Desk	Rep
Approve Course Completion Manually	no	no	no	no	no	✓	no	no
Create Access Codes (activate/deactivate, edit, view debits)	✓	✓	✓	no	no	no	no	no
Create Bundled Course Offerings	✓	no	no	no	no	no	no	no
Create Certifications	✓	no	no	no	no	no	no	no
Create Curriculum (edit, delete, activate/deactivate)	✓	✓	✓	no	no	no	no	no
Enable Automated Course Enrollments	✓	✓	no	no	✓	no	no	no
Grant Course Extensions, Additional Retakes	✓	✓	✓	✓	✓	✓	✓	no
Import Course Enrollments, Certifications from Excel	✓	✓	✓	no	no	no	no	no
Manage Course Enrollments (access codes)	✓	✓	✓	✓	no	no	no	no
Manage Availability (course catalogue, expiry, retakes, duration, access restriction, timed tests)	✓	✓	no	no	✓	no	no	no
Manage Supplemental Training for Users	✓	✓	✓	✓	no	no	no	no
Manually Grade (Modules, Essays, etc.)	✓	no	no	no	✓	✓	no	no
Override Exam Responses	✓	✓	✓	no	no	no	no	no
Reset Exams	✓	no	no	no	no	no	no	no
Run Course Level Reports	✓	✓	✓	✓	✓	✓	no	no
Set Prerequisites, Completion Rules at Course Level	✓	no	no	no	no	no	no	no
Set Prerequisites, Completion Rules for Course Assets	✓	✓	no	no	✓	no	no	no
Upload Large Files via Informetica FTP	✓	✓	no	no	✓	no	no	no
View Course Progress and Results	✓	✓	✓	✓	✓	✓	no	no
View and Purchase Subscriptions	✓	✓	✓	no	no	no	no	no

COMMUNICATIONS								
Permission vs. Role	**Site Manager**	**Campus Admin**	**Campus Manager**	**User Group Manager**	**Publisher**	**Instructor**	**Help Desk**	**Rep**
Assign Forum Moderators	✓	no	no	no	✓	no	no	no
Create Calendar Entries for Course Start/End Dates	✓	✓	no	no	✓	✓	no	no
Create Calendar Entries for Deadlines (Automatic)	✓	✓	no	no	✓	✓	no	no
Create Course Level Events/News and Personal Tasks	no	✓	✓	✓	✓	✓	no	no
Create System-Wide (Global) Events/News	✓	no	no	no	no	no	no	no
Create Events/News for Groups	✓	✓	✓	✓	no	no	no	no
Create Events/News for Individuals	no	✓	✓	✓	✓	no	no	no
Email to Entire Class Roster	✓	✓	no	no	✓	✓	no	no
Monitor and Particiate in Forums	no	✓	✓	✓	✓	✓	no	no
Monitor Feedback via Affidavits	✓	✓	✓	✓	✓	✓	no	no
Participate in Course Chat	no	✓	✓	✓	✓	✓	no	no
View Class List	no	✓	✓	✓	✓	✓	no	no

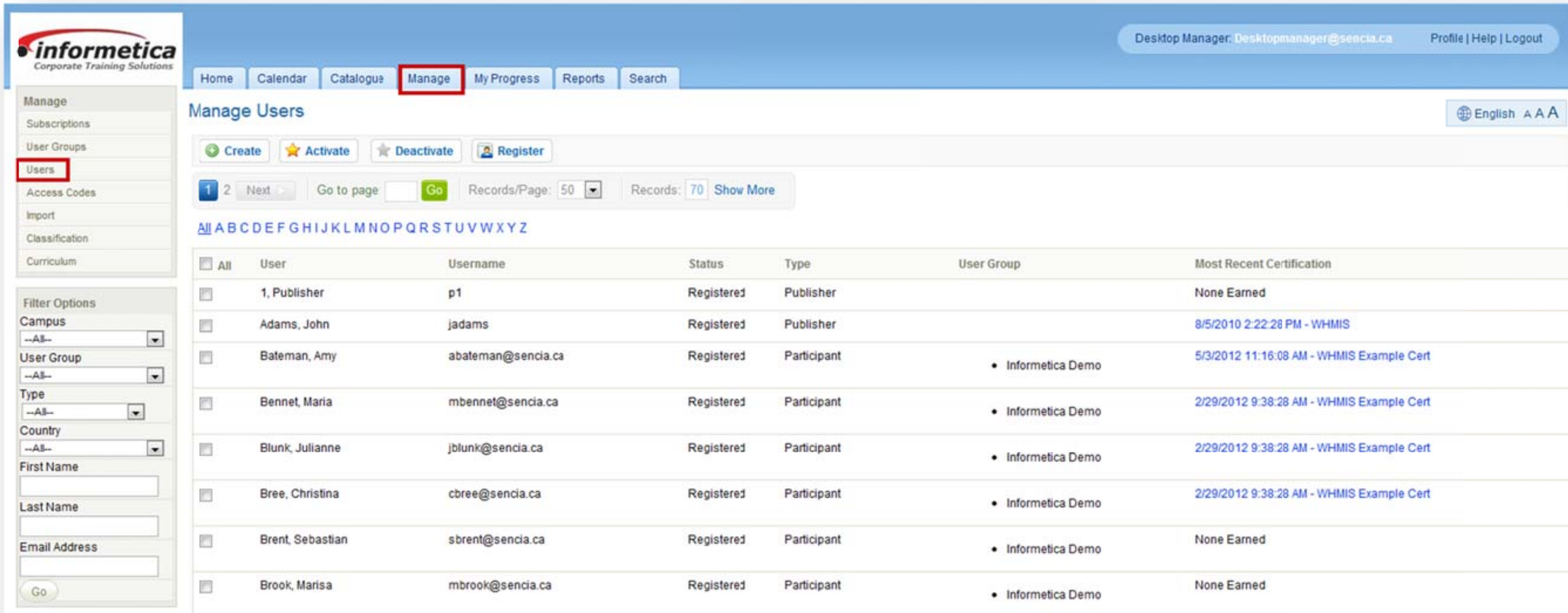
COURSE AUTHORING								
Permission vs. Role	**Site Manager**	**Campus Admin**	**Campus Manager**	**User Group Manager**	**Publisher**	**Instructor**	**Help Desk**	**Rep**
Activate and Deactivate Courses	✓	✓	no	no	✓	✓	no	no
Create Courses from Templates	✓	✓	no	no	✓	no	no	no
Create Affidavits	✓	✓	no	no	✓	no	no	no
Create and Edit Content (move, copy, rename, hide, assign, reorganize, export)	✓	✓	no	no	✓	no	no	no
Create Testing Materials, Questionnaires, Appraisals	✓	✓	no	no	✓	no	no	no
Delete Courses	✓	no	no	no	no	no	no	no
Delete Files and Course Components	✓	✓	no	no	✓	no	no	no
Export to Informetica Created Course to SCORM	✓	✓	no	no	✓	no	no	no
Manage Course Descriptions	✓	✓	no	no	✓	no	no	no
Upload from 3rd party course authoring applications such as Captivate/Articulate	✓	✓	✓	no	✓	no	no	no
Upload Presentation, Video, Image and Document Files	✓	✓	no	no	✓	no	no	no

3.2 Manage Users

3.2.1 For Campus Admins / Campus Managers

The manage users screen allows you create new users, view a list of existing users, register users to new products and activate or deactivate user accounts. Information provided at a glance from the manage users page is the user's name (user) and login (username), status, which user groups the accounts belong to and any recent certifications earned.

Using the Filter Options menu on the left, you can filter the results to only show specific user accounts such as users in specific user groups or country or by searching name or email address. To access to the manage users screen, click the Manage tab from the main navigation bar, then click the Users link from the Manage menu on the left.

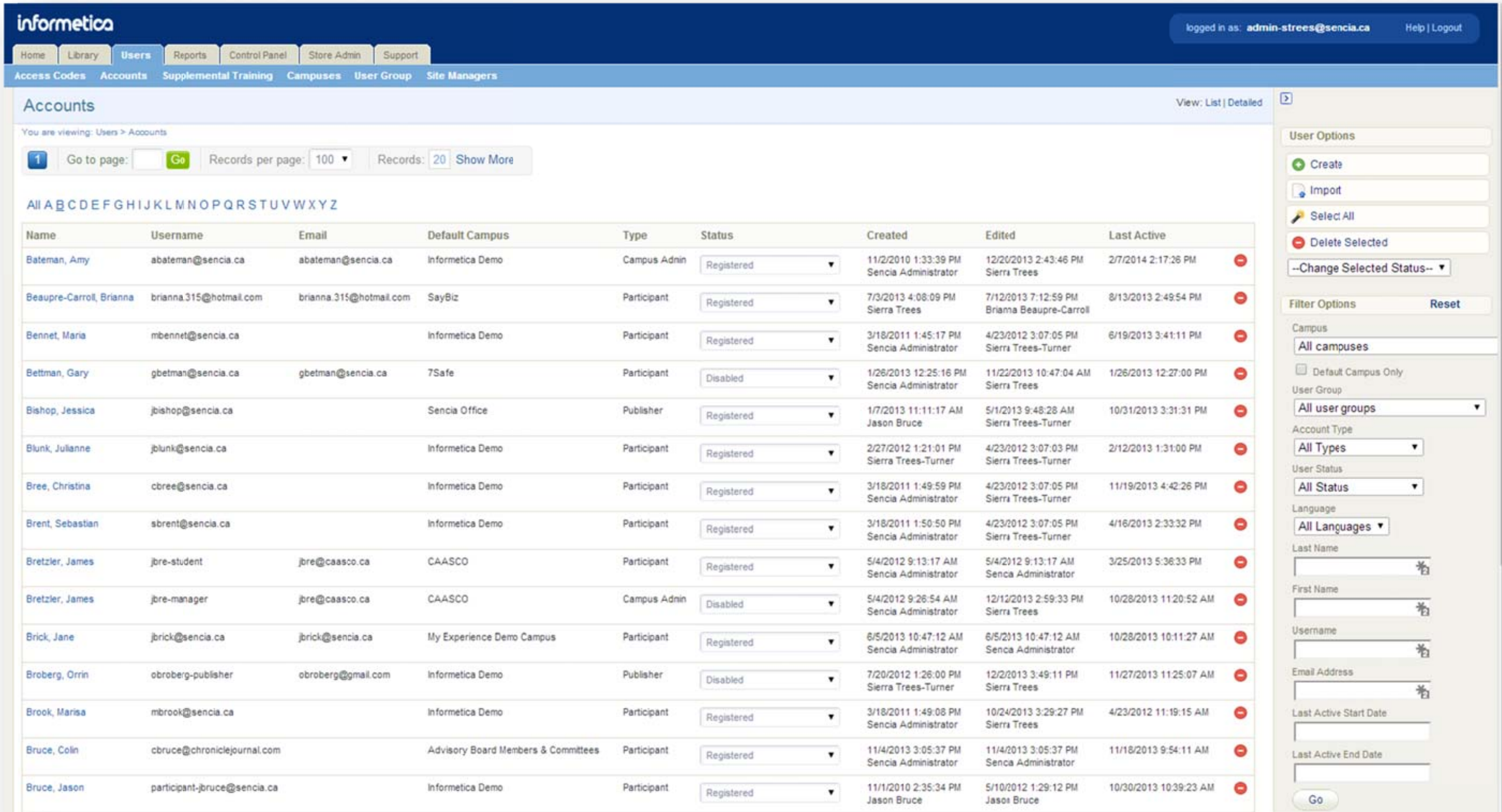


3.2.2 For Site Managers

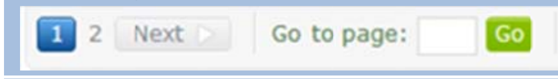
Below is a brief description of the fields:

Field	Description	Interactive
Check Box	Select any user by clicking the check box on front of their name. Select the All check box to select every user in the list at once.	Yes
User	This is the name of the user. Click any name to enter the Edit User Info screen.	Yes
User Name	This is the name the user logs in with.	No
Status	If this field says registered, then the account is active. If the field says registration pending, this indicates that the account is not active but can be reactivated.	No
User Group	Shows a list of all user groups the user belongs to. For users that belong to many user groups, this list is often truncated. You can view the entire list by clicking View All.	No
Most Recent Certifications	This field indicates any recent certifications the user has obtained, if any.	Yes

The accounts page allows you create new users or to view a list of existing user accounts. Information provided at a glance for user accounts are the date that the account was created and updated, the type of account, when they were last active and which User Groups the accounts belong to. The detailed view also provides email addresses and the last date that the user logged in. Using the filter options menu on the right, you filter the results to only show specific user accounts such as users in specific user groups, account type (participant, site manager, instructor, etc.), first or last name, username or email address.

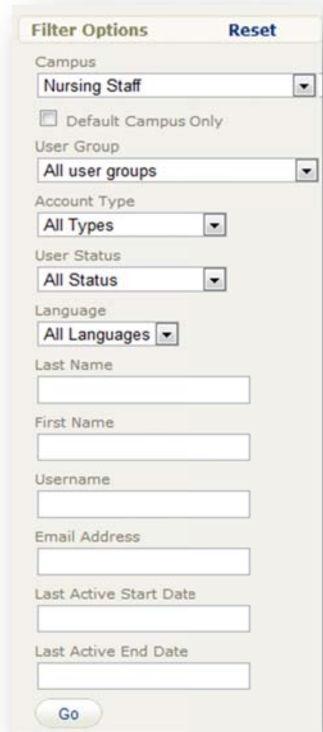

informetica
logged in as: admin-strees@sencia.ca
Help | Logout
Home
Library
Users
Reports
Control Panel
Store Admin
Support
Access Codes
Accounts
Supplemental Training
Campuses
User Group
Site Managers
Accounts
View: List | Detailed
You are viewing: Users > Accounts
1
Go to page:
Go
Records per page: 100
Records: 20 Show More
All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
Name Username Email Default Campus Type Status Created Edited Last Active
Bateman, Amy abateman@sencia.ca abateman@sencia.ca Informetica Demo Campus Admin Registered 11/2/2010 1:33:39 PM Sencia Administrator 12/20/2013 2:43:46 PM Sierra Trees 2/7/2014 2:17:26 PM
Beaupre-Carroll, Brianna brianna.315@hotmail.com brianna.315@hotmail.com SayBiz Participant Registered 7/3/2013 4:08:09 PM Sierra Trees 7/12/2013 7:12:59 PM Brianna Beaupre-Carroll 8/13/2013 2:49:54 PM
Bennet, Maria mbennet@sencia.ca Informetica Demo Participant Registered 3/18/2011 1:45:17 PM Sencia Administrator 4/23/2012 3:07:05 PM Sierra Trees-Turner 6/19/2013 3:41:11 PM
Bettman, Gary gbetman@sencia.ca gbetman@sencia.ca 7Safe Participant Disabled 1/26/2013 12:25:16 PM Sencia Administrator 11/22/2013 10:47:04 AM Sierra Trees 1/26/2013 12:27:00 PM
Bishop, Jessica jbishop@sencia.ca Sencia Office Publisher Registered 1/7/2013 11:11:17 AM Jason Bruce 5/1/2013 9:48:28 AM Sierra Trees-Turner 10/31/2013 3:31:31 PM
Blunk, Julianne jblunk@sencia.ca Informetica Demo Participant Registered 2/27/2012 1:21:01 PM Sierra Trees-Turner 4/23/2012 3:07:03 PM Sierra Trees-Turner 2/12/2013 1:31:00 PM
Bree, Christina cbree@sencia.ca Informetica Demo Participant Registered 3/18/2011 1:49:59 PM Sencia Administrator 4/23/2012 3:07:05 PM Sierra Trees-Turner 11/19/2013 4:42:26 PM
Brent, Sebastian sbrent@sencia.ca Informetica Demo Participant Registered 3/18/2011 1:50:50 PM Sencia Administrator 4/23/2012 3:07:05 PM Sierra Trees-Turner 4/16/2013 2:33:32 PM
Bretzler, James jbre-student jbre@caasco.ca CAASCO Participant Registered 5/4/2012 9:13:17 AM Sencia Administrator 5/4/2012 9:13:17 AM Sencia Administrator 3/25/2013 5:36:33 PM
Bretzler, James jbre-manager jbre@caasco.ca CAASCO Campus Admin Disabled 5/4/2012 9:26:54 AM Sencia Administrator 12/12/2013 2:59:33 PM Sierra Trees 10/28/2013 11:20:52 AM
Brick, Jane jbrick@sencia.ca jbrick@sencia.ca My Experience Demo Campus Participant Registered 6/5/2013 10:47:12 AM Sencia Administrator 6/5/2013 10:47:12 AM Sencia Administrator 10/28/2013 10:11:27 AM
Broberg, Orrin obroberg-publisher obroberg@gmail.com Informetica Demo Publisher Disabled 7/20/2012 1:26:00 PM Sierra Trees-Turner 12/2/2013 3:49:11 PM Sierra Trees 11/27/2013 11:25:07 AM
Brook, Marisa mbrook@sencia.ca Informetica Demo Participant Registered 3/18/2011 1:49:08 PM Sencia Administrator 10/24/2013 3:29:27 PM Sierra Trees 4/23/2012 11:19:15 AM
Bruce, Colin cbruce@chroniclejournal.com Advisory Board Members & Committees Participant Registered 11/4/2013 3:05:37 PM Sencia Administrator 11/4/2013 3:05:37 PM Sencia Administrator 11/18/2013 9:54:11 AM
Bruce, Jason participant-jbruce@sencia.ca Informetica Demo Participant Registered 11/1/2010 2:35:34 PM Jason Bruce 5/10/2012 1:29:12 PM Jason Bruce 10/30/2013 10:39:23 AM
User Options
Create
Import
Select All
Delete Selected
--Change Selected Status--
Filter Options
Reset
Campus
All campuses
Default Campus Only
User Group
All user groups
Account Type
All Types
User Status
All Status
Language
All Languages
Last Name
First Name
Username
Email Address
Last Active Start Date
Last Active End Date
Go

Below is a brief description of the fields on the User Accounts page (as shown in list view)

Field	Description	Interactive
Page Navigation bar	Click a page number, the next button to enter a number in the go to page field 	Yes
Alpha Filter bar	Click any letter to filter to see only those accounts whose last names start with the letter selected. 	
Show More	Click “show more” to see a list of user types that can then be clicked to show only the type selected. 	Yes
Name	This is the name of the user. Click any name to enter the edit user info screen.	Yes
User Name	This is the name the user logs in with.	No
E-Mail	This is the user’s email address.	No
Integration Username	The integration username was implemented to allow site managers the ability to view and manage Integration Usernames. This affects only those systems using single sign on.	No
Default Campus (Campus)	Shows the default campus that the user belongs to.	No
Type	Indicates which user type the user is.	No
Status	If this field says registered, then the account is active. If the field says registration pending, this indicates that the account is not active but can be reactivated.	Yes
Created	Shows when the account was created.	No
Edited	Indicates when the account information was last edited.	No
Last Active Start Date	The last timestamp of when the user logged in.	No
Last Active End Date	The last timestamp of when the user logged out.	No
Delete	Click the delete icon to delete a user account.	Yes

3.2.3 Filtering Users

To change the order in which the list of users is displayed or to see only specific user accounts displayed on the accounts page, click any of the options under the filter options menu on the right hand side, use any of the options under the Filter Options menu on the left hand side. By default, users are sorted alphabetically by Last Name. Please note that the field names used for your system may be customized and therefore differ from the examples in this manual. Below is a brief description of the fields, note that some of them are available only to site managers:

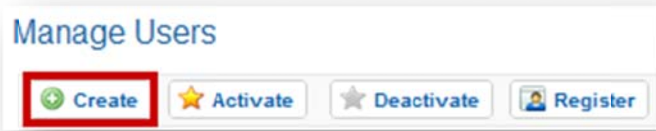


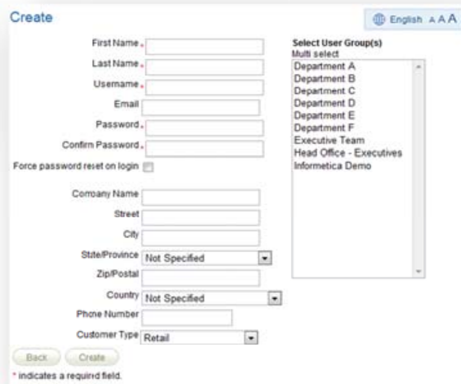
Filter Option	Description	Click Go
Reset	Choose the reset link at the top to remove any filters.	Click Reset
Campuses	Use the drop down menu to see users assigned to a specific campus.	Required
User Group	Use the drop down menu to see users assigned to specific user groups.	Required
Account Type	Use the drop down menu to see users that are a specific user type.	Required
User Status	Use the drop down menu to see only accounts that have a specific status (registered, registration pending, disabled or archived).	Required
Language	Use the drop down menu to see only accounts using a specific language.	Required
Name Last/First/User	Type in a full or partial search term for a specific first name.	Required
Last Active Start/End Date	Use these two fields to create a date range to search for accounts based on activity level.	Required

3.4 Create Users

3.4.1 For Campus Admins / Campus Managers

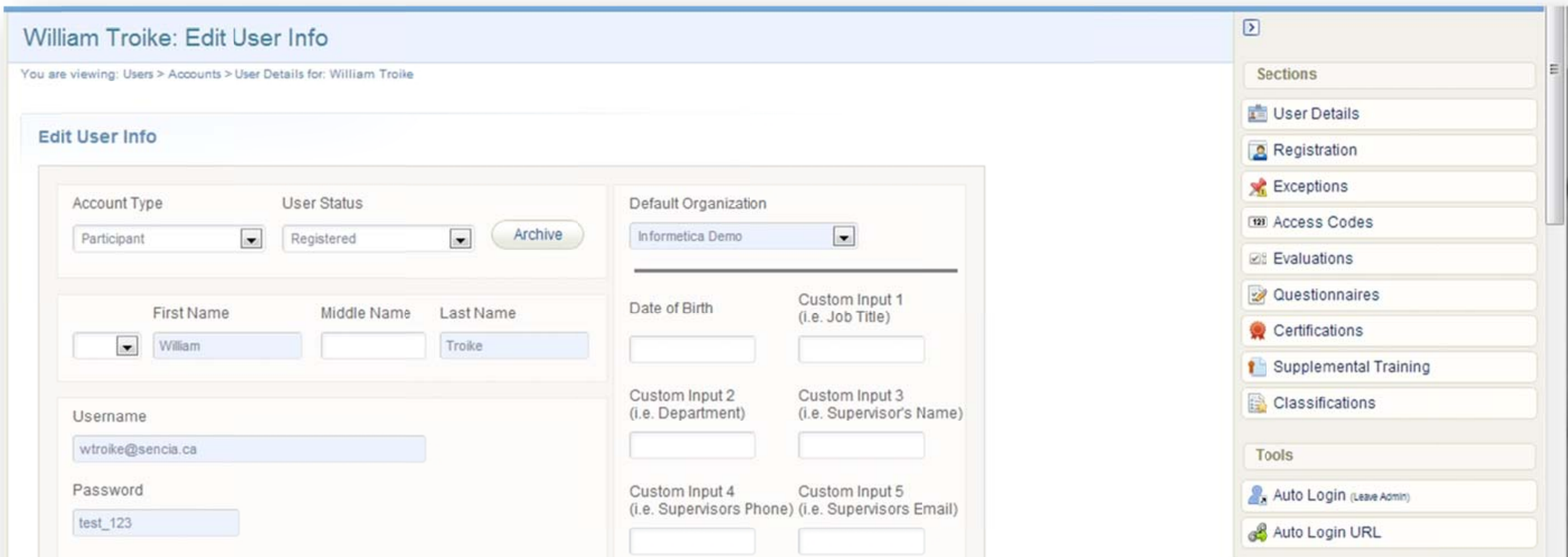
To create a new participant account, click the create button from the manage users page. Fill out all of the required fields (indicated with a red asterisk *) and select at least one user group. Click the create button at the bottom or click back to cancel the creation and return to the manage users page. Alternatively, you can create many users accounts at once using the import tool. This is covered in the Importing Data chapter of this manual. The fields and criteria you see may differ from the example below, depending on your system's configuration.





3.4.3 For Site Managers

From the accounts page you can press the create button to create a new user or click a user's name to view an individual user account. Alternatively you can create a new user from the home page under quick create by clicking user account. Either method will bring you to the user details page where you can enter data into a number of fields and where a site manager can make changes.



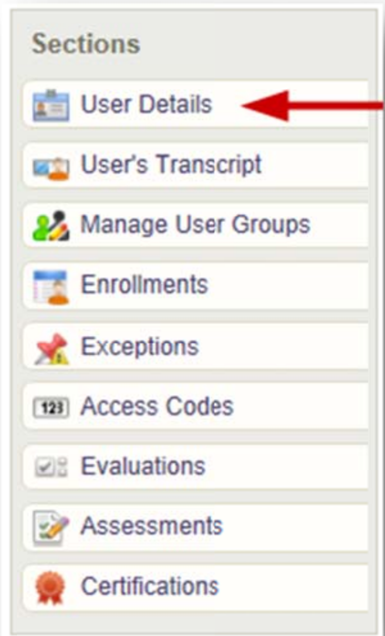
3.4.4 User Info Field Descriptions

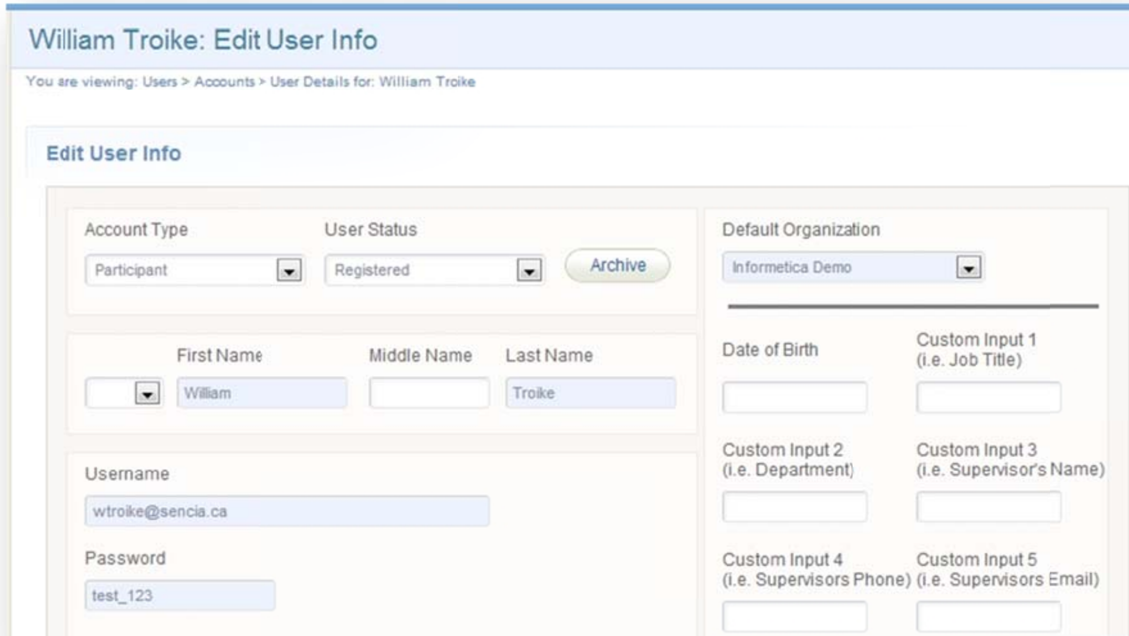
The fields set up for your Informetica system may differ than those listed below. What follows is a list of common fields.

Info Field	Description
Name	Change the User's First Name and Last Name. A prefix such as Dr. or Mrs. can be added or changed from a drop down menu as well.
Username	Enter the new Username.
Password	You can change the user's password here. Confirm the change by typing it in exactly the same in the Confirm Password field.
Minimum Password Requirements	This field simply shows if the user's password meets specifications previously set up for your LMS. The criteria with a red x are not met and the criteria with a green checkmark √are met.
Contact Information	Enter or change User's Email address, Web Address, Address or Phone Number and extension in these fields. You can use the dropdown list to determine the type of phone number and add multiple phone numbers with the add button.
Default Campus	The user's default campus can be changed using the dropdown menu here if you manage more than one Campus. Changing the campus will also change the user's corresponding landing page.
Company Contact Information	Enter such information as a secondary job title, department, supervisor's name, phone and email and the user's company name.
Classification	Use the dropdown list to select a classification if necessary
Language & Dictionary	See the language the user currently views the LMS in and the corresponding dictionary assigned to that language
Security Information	View the User's security question and answer. Users will be prompted for the answer to their security question when using the Forgot Password feature on the LMS login. An account will become automatically locked when the security question has been answered incorrectly 3 times or if a site manager manually locks the account.
Account Lock Status	Shows if a user's account is unlocked or locked. You can also unlock the account or lock it for a specified time.. An account will become automatically locked when the security question has been answered incorrectly 3 times.
Account Password Reset	The force password reset option allows an admin to flag single accounts to require a password reset. If you toggle this option on for a user, that user will be prompted by the LMS to change their password upon login. The user will be unable to do anything else until they change their password, which will have to match the current security settings.
Required Fields	Required fields are determined during your initial LMS set up. Users will be prompted to fill out all required fields when registering.

3.5 Edit User Details

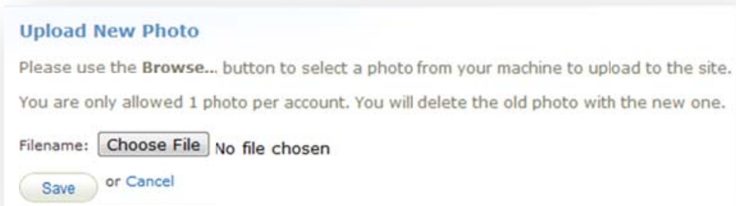
Click on any user's name to open the Edit User Info page. If you navigate away from this page, simply click the User details link in the sections menu on the left to return to it. Alternatively, you can update many user accounts at once using the Import Tool. This is covered in the Importing Data chapter of this manual.

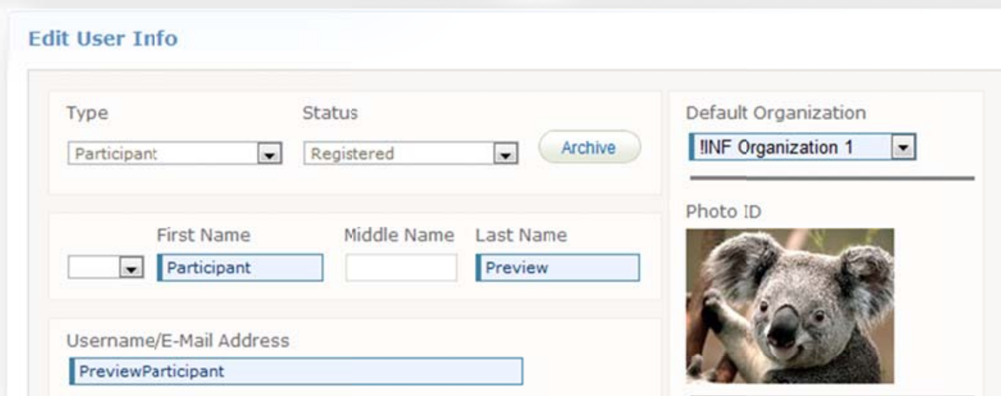




3.6 Upload a User Photo

Some sites have an optional configuration to upload a photo of the user to the account information. Click on the Upload link under Photo ID and then use the browse or choose file button to select a photo to upload. Click the save button and a confirmation window will let you know that the photo was uploaded successfully.



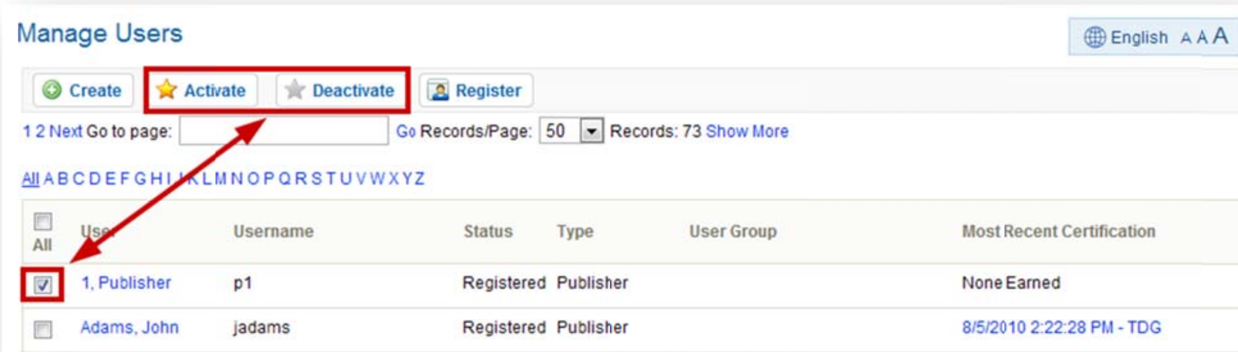


The photo will now show up in the user's profile.

3.7 Activate or Deactivate Users

3.7.1 For Campus Admins and Campus Managers

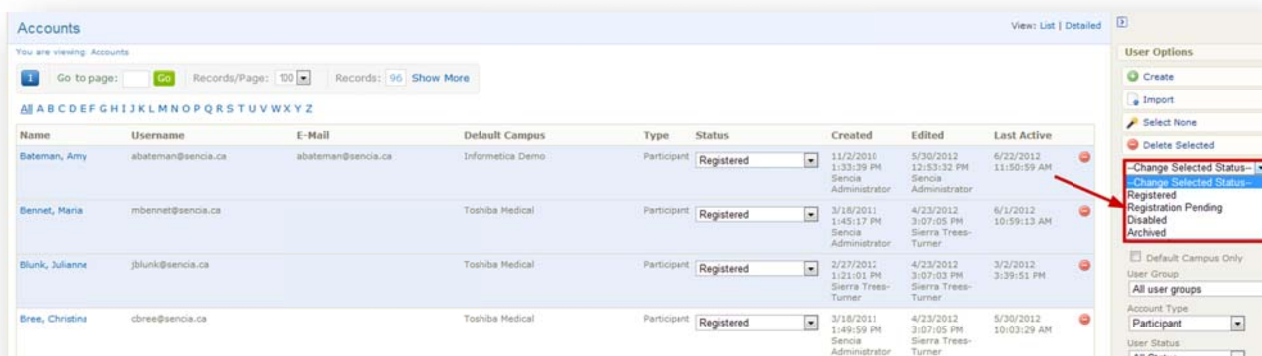
From the manage users screen, you can activate or deactivate users. This affects their access to the Informetica system.



To activate a user listed with a status of registration pending, select the user by clicking the check box in front of the user. Click the activate button near the top of the manage users page to give the user access to the Informetica system. The process is the same for deactivating a user, except that the deactivate button is selected instead.

3.7.2 For Site Managers

You can change the status of a single account from the user's profile. Navigate to the edit user info page for the user you wish to change and use the drop down menu under status to make a new selection. Alternatively, from the accounts page, you can highlight specific accounts and use the change selected status drop down to change all of the selected accounts. This can be done from both list or detailed views. The example below is using List view. Note that the filter options and the select all tool on the right hand menu can be used to help find specific users.

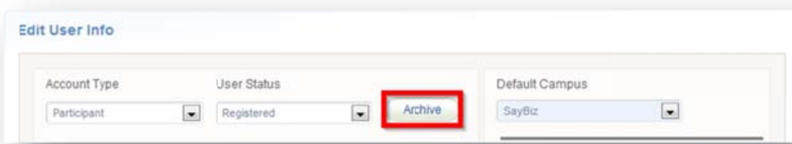


3.8 Archive Users

This option is available to site managers, campus admins, campus managers, and help desk users.

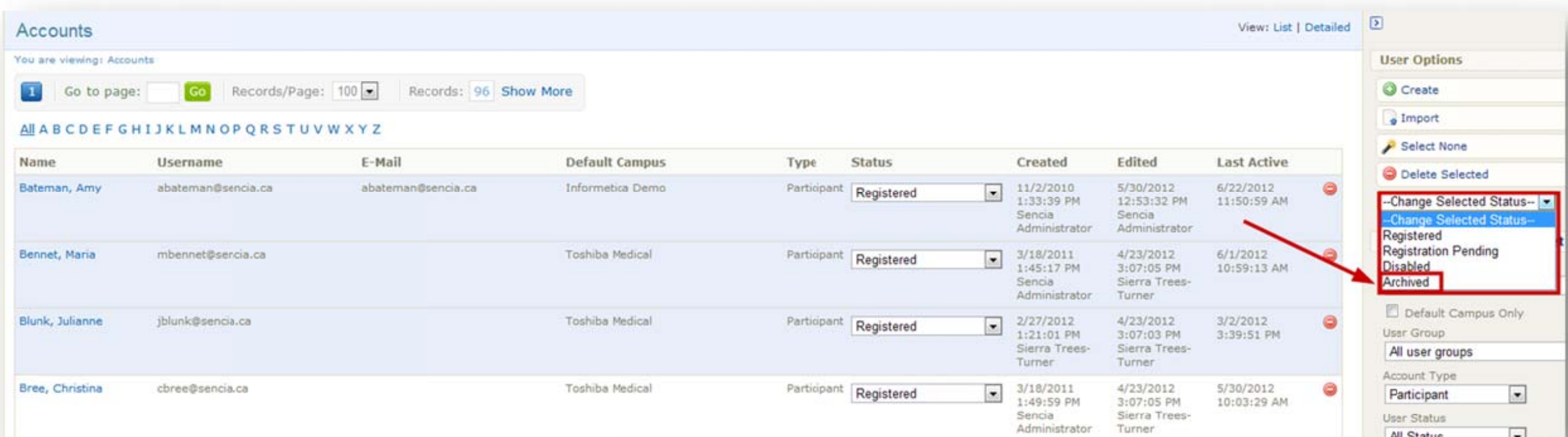
Archived users are not counted towards the total user count when determining Informetica subscription pricing and should only be applied to users who no longer need to access the system for any reason. Archived users also do not appear on any reports. Reinstating archived users requires a request to Sencia to re-activate the account for which a service charge may apply. Archiving a user will result in a confirmation window. You can archive a single account from the user's profile. Navigate to the edit user info page for the user you wish to archive and press the archive button.

You can no longer report on archived users, however, systems enabled with the certification log, can view keep an historical record of archived users who have obtained certifications within Informetica.



Alternate archive method for site managers

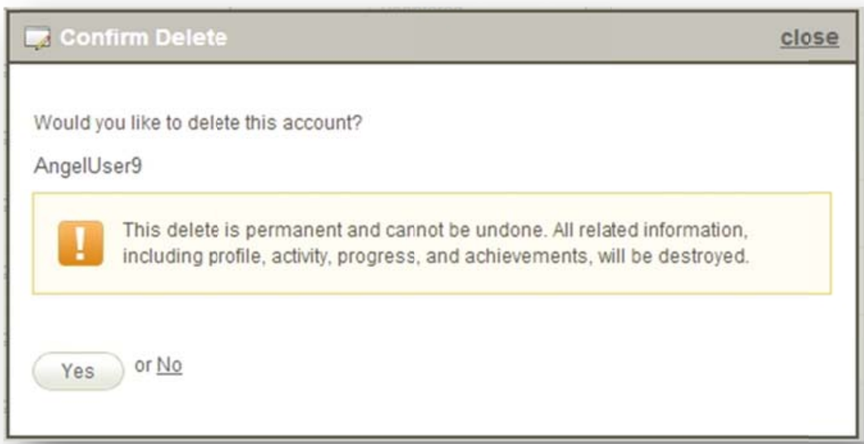
Alternatively, from the accounts page, you can highlight specific accounts and use the change selected status drop down to archive all of the selected accounts. This can be done from both list or detailed views. The example below is using List view. Note that the filter options and the select all tool on the right hand menu can be used to help find specific users.



3.9 Delete Users

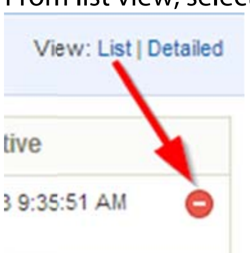
This option is available only to site managers.

Deleting users permanently destroys profile information, activity, progress, grades and achievements. Consider archiving users if you prefer to retain their records. Before you finalize a deletion, you will be asked to confirm.



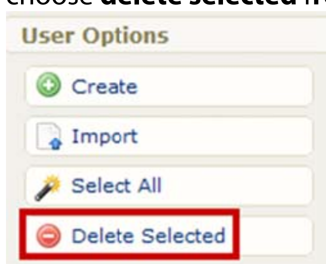
Delete one user

From list view, select the **delete** icon next to the user you want to delete.



Delete multiple users

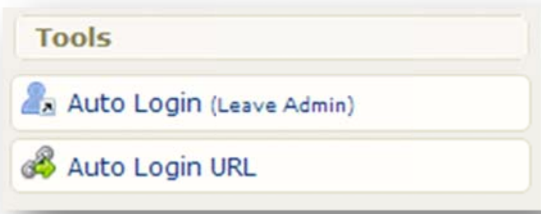
Select the user(s) by clicking inside of the information box, and then choose **delete selected** from the user options menu.



3.10 Auto Logins

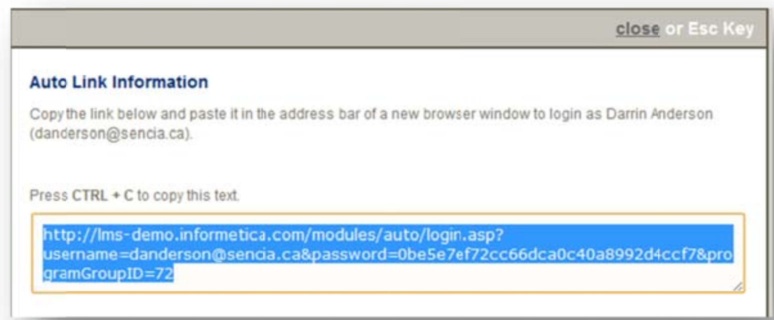
This option is available only to site managers.

The auto login tool allows site managers to login to user accounts without needing to type in their username and password. This is handy for viewing the desktop as that user sees it or even to provide a link for another person to login to the system.



When you select the auto login link, the system will automatically log you out of your site manager account and log you in as the selected user.

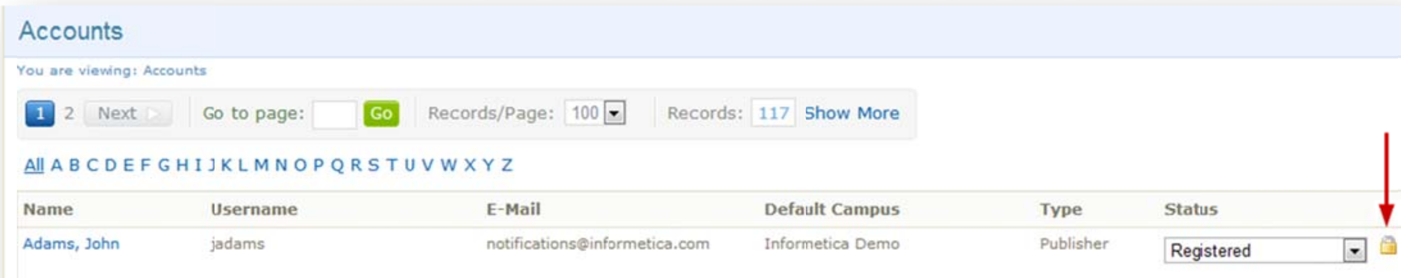
When you select the auto login URL, the system provides you with a link that can then be pasted into a browser window and used to automatically login to the system. Common practice is to open this link in a different browser so that the site manager can remain logged in to their own account while still viewing the desktop account. The link may also be sent to other users to provide an automatic login so they can view the system.

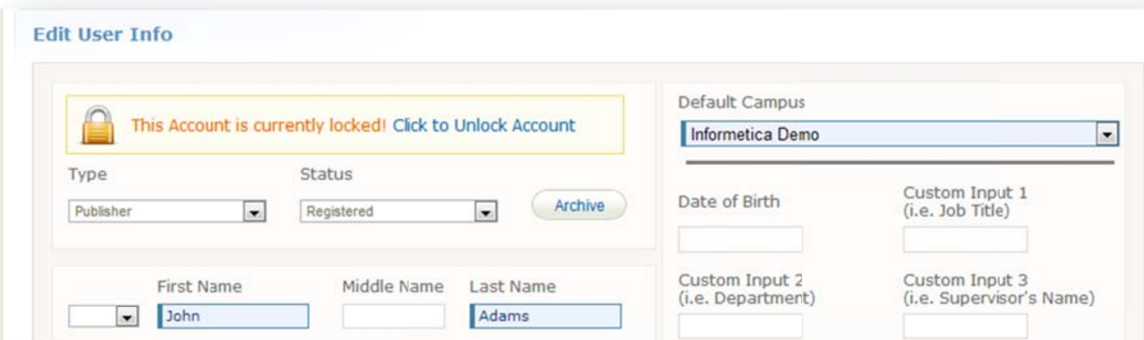


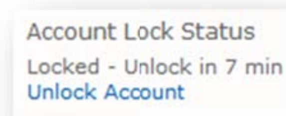
3.11 Locked Accounts

This option is available only to site managers.

For site managers, locked user accounts are identified with a lock icon that is visible both on the user accounts page and on each individual account. A user's account will become automatically locked if the security question has been answered incorrectly 3 times. Site managers can also lock an account for a specified number of minutes. You can click the lock icon from the user accounts page to unlock the account, or do so by opening the individual account from the "edit user info" page by clicking the lock icon at the top or the "unlock account" link in the profile.



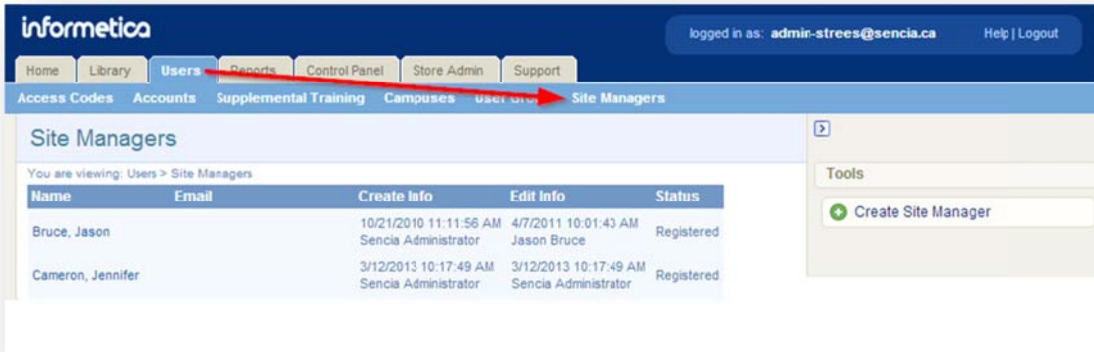




3.12 Site Manager Account Management

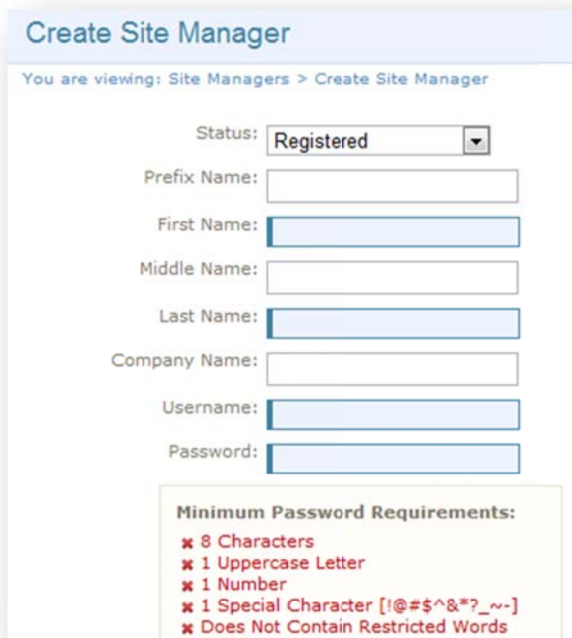
This option is available only to site managers.

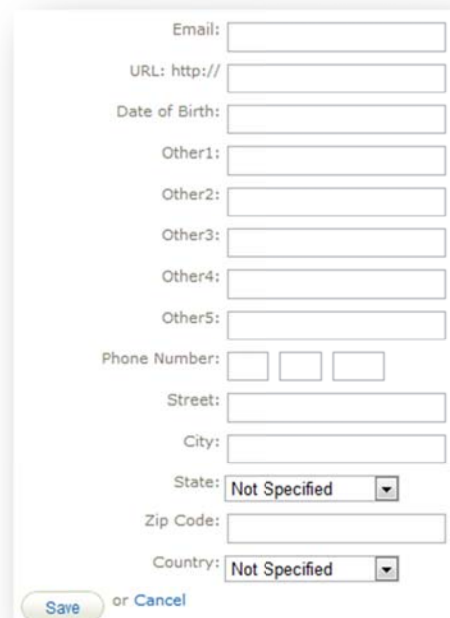
Click Users and then Site Managers to open the Site Managers screen where you can create new site managers or edit existing site manager information. This page provides a list of all site managers whether their account status is set to registered, registration pending or disabled.



Click create site managers in the sidebar to go to the create site manager page and then enter the information for the new site manager. Configurations will vary with password requirements and required fields. Click on the name of a Site Manager to open the Edit Site Manager page and make the desired changes, then click save.

indicates a required field

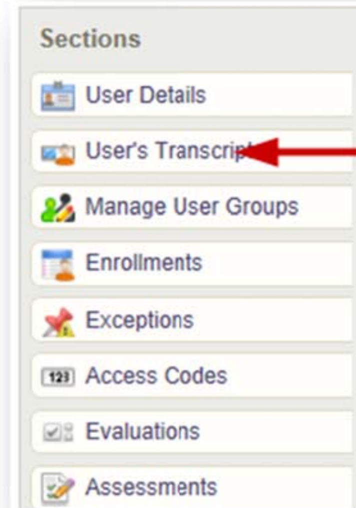




3.13 User's Transcript

This option is available to campus admins and campus managers.

View a user's transcript to see a list of products they are registered to as well as which gradable assets they have attempted or not yet attempted the number of attempts, and the grades received for each. Select any user name to access the Sections menu. Select **Transcript** from the sections menu on the left to open the user's transcript. Click the + symbol to expand the product and view the individual product's gradable assets. The transcript will not show any information for products that have no gradable content or have not yet been attempted.



Below is a brief description of the fields:

Field	Description
My Results	Shows the name of the gradable asset.
Required	Y indicates that the asset is a curriculum requirement. N indicates that there is no curriculum requirement, the curriculum requirement is optional, or the curriculum option is not being utilized.
Due Date	If applicable, this will show the date by which the asset must be completed.
Take #	Number of times a user has attempted the asset. The most recent passed attempt will show over other attempts. **No takes**: User has not yet attempted the asset. **Take # 0:** User has started the asset, but not yet completed it.
Date	This is the date that the asset was completed by the user.
Highest Grade	This shows the best mark that the user has received for the asset.
Passed	Shows whether or not the user has passed the asset. This field will shows as Yes, No or Incomplete. Yes shows when the user has received a passing score. No shows when the user has not received a passing score. Incomplete shows when the user has started the asset but not yet completed it to receive a score/grade.

3.14 Product Enrollments / Registrations

View the products that a specific user is enrolled in and when the products were completed. This section is where you can view, edit or add additional registrations to the user's organization, user group and products. The registration dropdown menus contain only the user groups that belong to the selected user's organizations. Similarly, only products that are available to the assigned user groups will be available. Each product type has its own registration area and drop down menus. Registration can be found within a user profile on the edit user info page under the sections menu. Each product type has its own registration area and drop down menus.

Below is a brief description of the fields

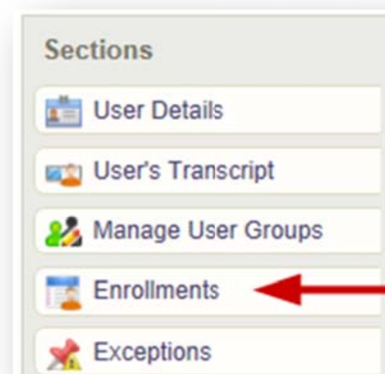
Field	Description
Name	The name of the product the user is registered to.
Type	This lists the product type.
Status	Registration status can be active, inactive, or inactive-imported (SCORM import utility was used to enrol user).
Published	A course that is published forever or whose publishing dates are within current date will show a Yes in this column.
Enrollment	Indicates whether the user is approved or pending registration for the corresponding product.
Enrollment Date	This is the date and time that the user was enrolled to the product.
Duration	This indicates the number of days the user has access to the product, if applicable.
Finish Date	This field shows the date that the use completed the product.

View as Campus Admin or Campus Manager

Select any user by clicking their name to access the Sections menu. Click the Enrollments link from the sections menu on the left to open the enrollments page for the user.

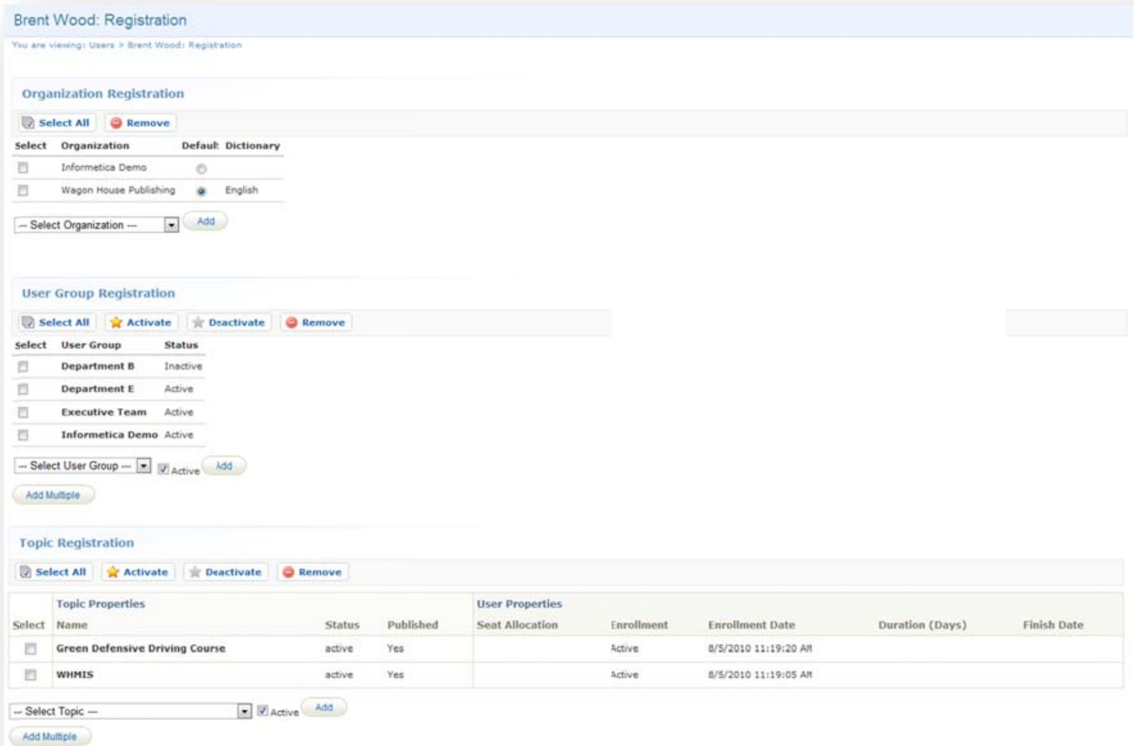

Betsy Henderson: Enrollments

	Products Properties			User Properties			
Name	Type	Status	Published	Enrollment	Enrollment Date	Duration (Days)	Finish Date
C001 Beginner Skills	Topic	active	No	Register - Approved	11/3/2010 5:43:09 PM		
C002 Intermediate Skills	Topic	active	No	Register - Approved	11/3/2010 5:43:17 PM		
C003 Advanced Skills	Topic	active	No	Register - Approved	11/3/2010 5:43:27 PM		
PL01-Attendance Policy	Topic	active	No	Register - Approved	11/3/2010 7:44:01 PM		
PL03-Snow-Closure	Topic	active	No	Register - Approved	11/3/2010 7:44:14 PM		
WHMIS	Topic	active	No	Register - Approved	11/3/2010 5:43:49 PM		



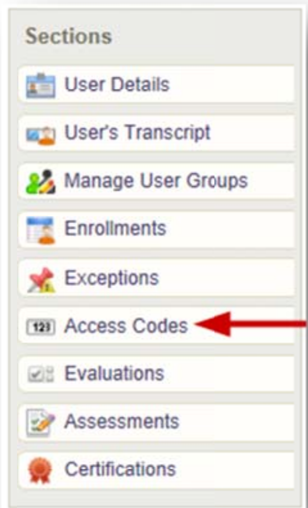
View as Site Manager

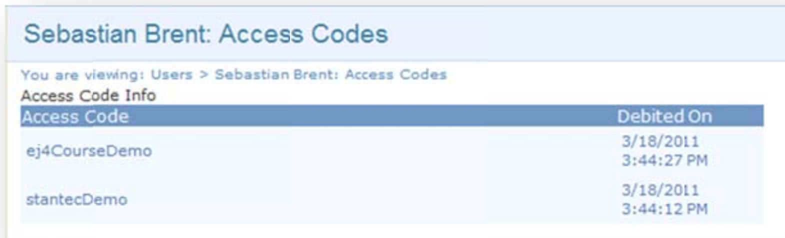
Select any user by clicking their name to access the Sections menu. Select **Registration** from the sections menu on the left to open the registration page for the user.



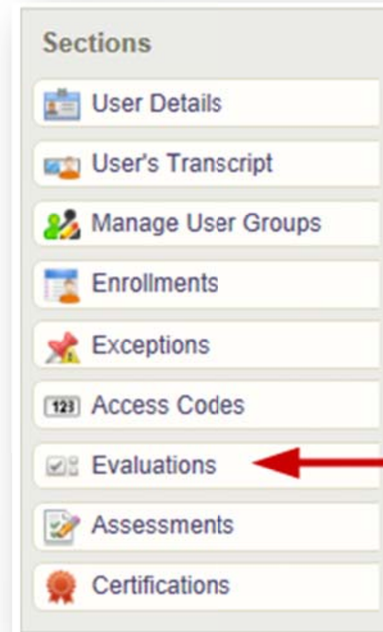
3.15 Access Codes

To see a list of access codes any access codes that have been used either by the user or by a manager on the user's behalf, select any user by clicking their name to access the Sections menu and click Access Codes. The column called access code indicates the name of the access code and column called Debited On indicates the date and time the code was used. Managers must use access codes to register a user to products. For more on registrations using access codes, please visit the Access Codes chapter of this manual.





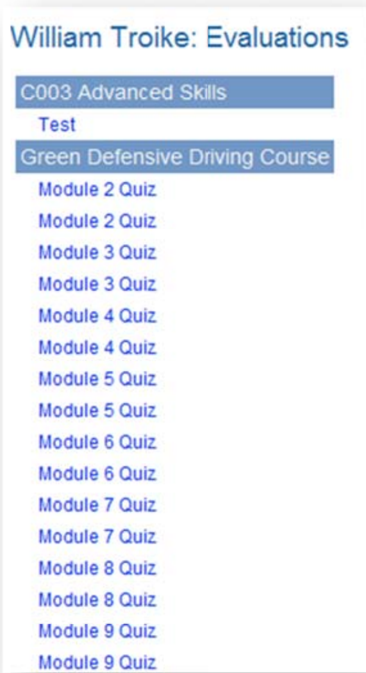
3.16 Evaluations

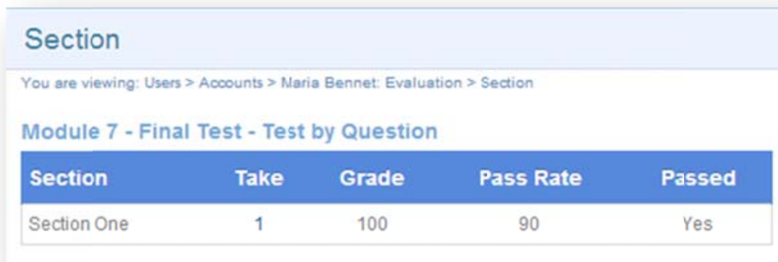


Evaluations are built within Informetica and are the primary testing assets. They may be used to test a participant's knowledge of the content that is provided, collect feedback about a product or an instructor or used as practice exercises. There are 7 different types of questions that can be used to create an evaluation: essay, fill in the blank, matching, multiple answer, multiple choice, ranking and true or false. Informetica can automatically grade every type of question in an evaluation except for essays. A product may contain any number of evaluations.

Evaluations are accessed within a user's profile on the Edit User Info page under the Sections menu.

This section shows which evaluations the user is registered to. The names of all evaluations are listed under products they belong to. Click any evaluation name to open a window with more details. This will be a mostly blank page if the user had not yet attempted the evaluation.



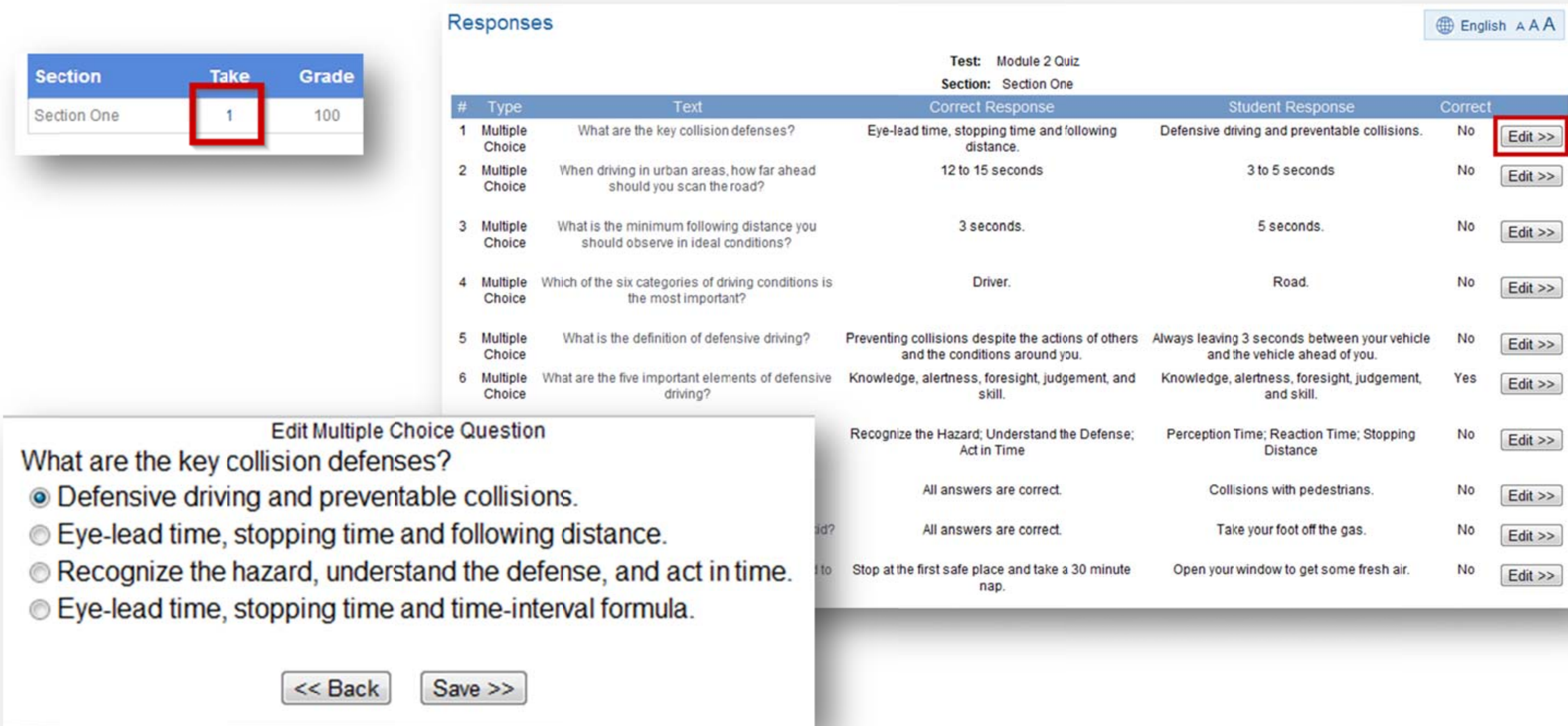


Field	Description
Section Take	Indicates which section of the evaluation was attempted and how many times the user attempted the evaluation.
Grade	Indidcates the score or grade the user received for each attempt of the evaluation.
Passed	Indicates whether or not the user passed the evaluation.

3.16.1 Override Evaluation Answers

This option is available to site managers, campus admins, and campus managers.

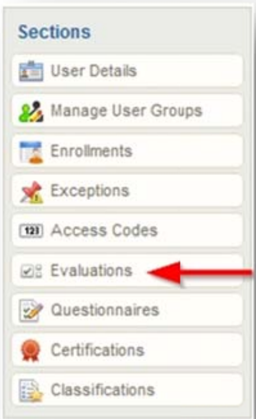
Managers can override specific answers on an evaluation for a user if necessary. Click on any evaluation in the user's list to see more details about the evaluation and then click the interactive take number (see example below). This will open a page of the user's specific responses, what the correct responses are and if the user answered correctly or incorrectly. Click the edit button on the far right for any question to manually change the user's answer and then click save. The answer and any grade change will automatically be reflected on the user's account.

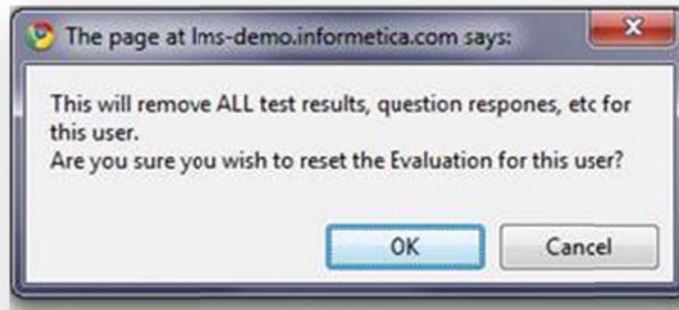


3.16.2 Resetting an Evaluation

This option is available to site managers, campus admins, and campus managers.

Evaluations can be found on the edit user info page under the sections menu on the right hand side. This section of the user details shows which evaluations the user is registered to. The names of all evaluations are listed under products they belong to. From here the manager can reset the evaluation for a user. Doing so will remove all previous answers and the user will be required to start the evaluation over. The system will ask you to confirm before resetting the evaluation.



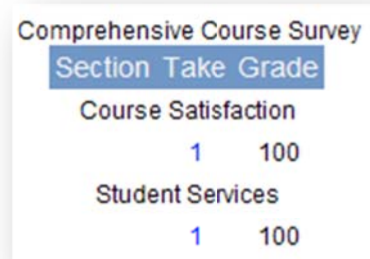


3.17 Assessments

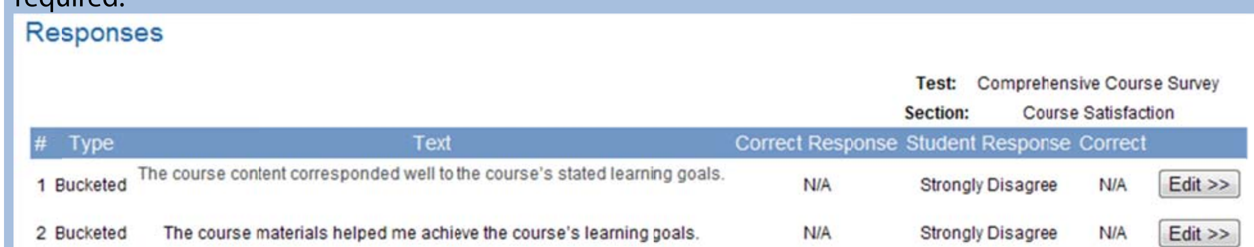
Assessments are an informal way to measure something about your participant by posing content where there is no right or wrong answer. Assessments are often an objective way to measure things like professional strengths and weaknesses, time management abilities, goals or aptitudes. Assessments can also be used as a survey tool to measure something, like online course satisfaction. Within Informetica, an assessment is created using bucketed questions. This bucketed style of testing allows for points to be assigned to a variety of predetermined responses presented either question by question or by sections. A report run on an assessment provides scores for each assessment bucket for each user's section and take of the assessment. The report quickly summarizes:

- Which of their employees are taking the assessment and how many times they attempted the it,
- The date of employees' last completion,

Each employee's response "score" (i.e. level of competency within a given skill set). Assessments can be found on the edit user info page under the sections menu on the right hand side. This section of the user details shows which assessments the User is registered to. The names of all assessments are listed under products they belong to. Assessments can be found on the edit user info page under the sections menu on the right hand side. This section of the user details shows which assessments the User is registered to. The names of all assessments are listed under products they belong to. Click any assessment name to open a window with more details, including the bucket, number of takes and the grade (weight given for the questions). This will be a mostly blank page if the user had not yet attempted the assessment.



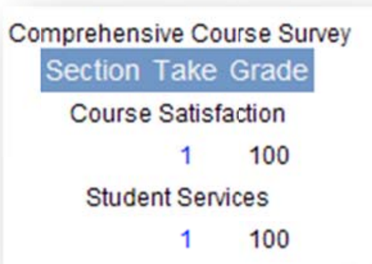
Below is a brief description of the fields:

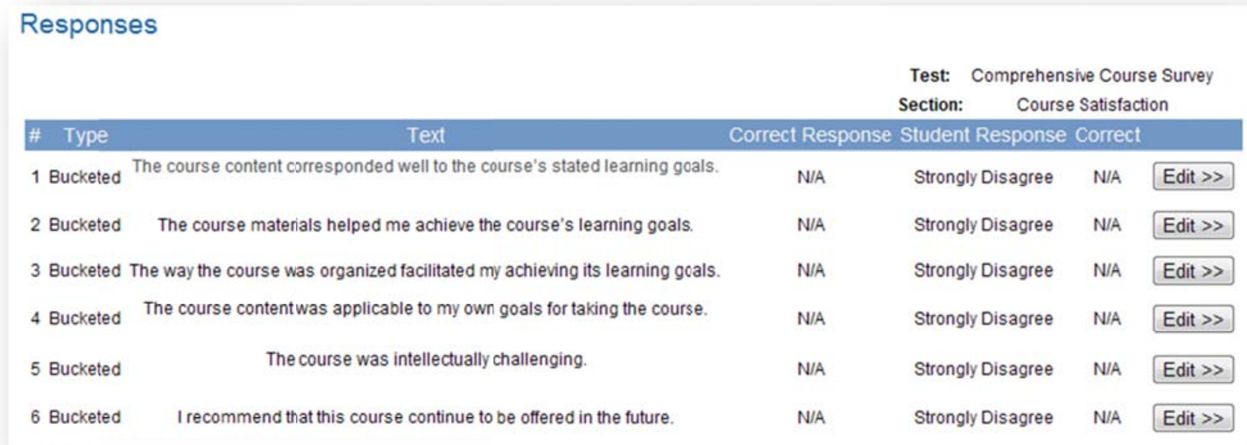
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Section Take</td><td>Indicates which section of the assessment was attempted and how many times the
user attempted the assessment. You can click the take number toview the participant's specific responses and make edits if required.

</td></tr>
<tr><td>Grade</td><td>Indidcates the weight or score the user received for each bucket within the assessment.</td></tr>
</table>

3.17.1 Override Questionnaire Answers

This option is available to site managers, campus admins, and campus managers.

Managers can override specific answers on questionnaires by clicking on the user's list to see more details and then clicking the blue interactive text, such as the number of the section in the example below. This will open a page of the user's specific responses. Click the edit button for any question to manually change the user's answer and then click save. The answer and any score change will automatically be reflected on the user's account.

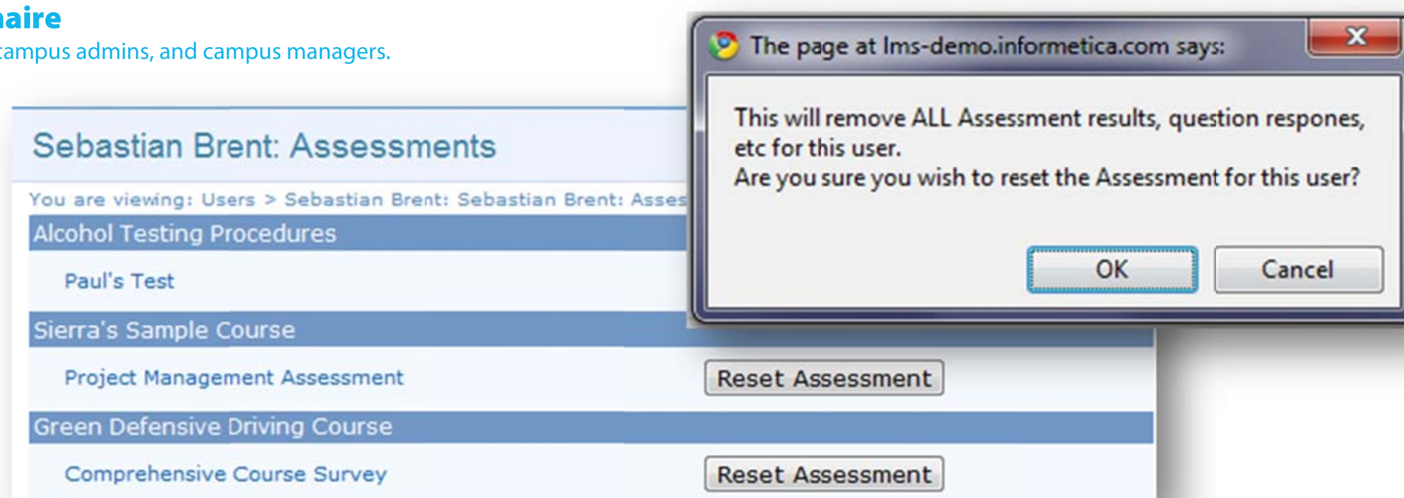




3.17.2 Resetting a Questionnaire

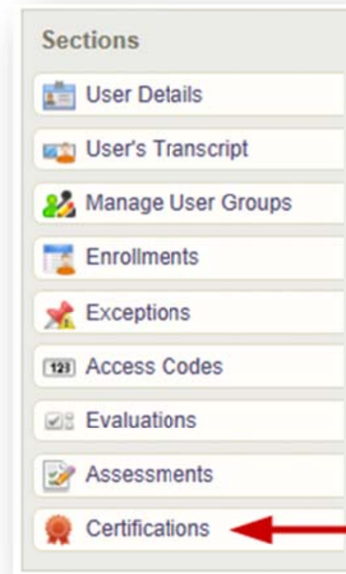
This option is available to site managers, campus admins, and campus managers.

A site manager can reset any assessment for a user. Doing so will remove all previous answers and the user will be required to start the assessment over. The system will ask you to confirm before resetting the assessment.



3.19 Certifications

Certifications can be found on the Edit User Info page under the Sections menu. The certifications section shows a listing of all of the certifications the selected user has already obtained, is working toward, or is eligible to earn.



Certification Progress shows how far a user had progressed toward completion of a certification. Below is a brief description of the fields:

Field	Description
Name	The name of the product.
Progress	This is a percentage of completion towards the certificate.
Enrolled	The date the user enrolled into the product.
Earned	The date the certificate was earned.
Set Earned Date	This interactive field lets you set a new date that the certificate was earned on.
Expires	The certification's expiration date if applicable
Certification Sent	The date that the certification was sent. This is used for clients who send out manual certifications.

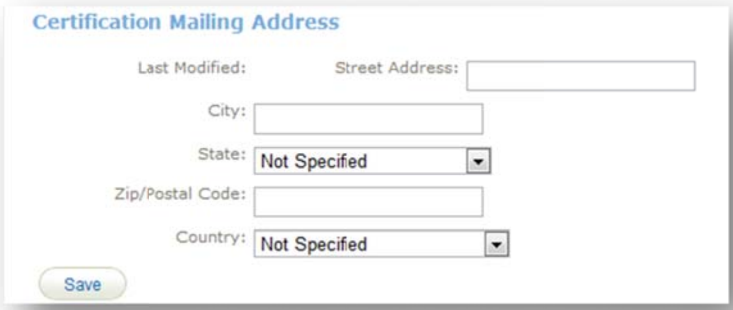
Certificate List is not to be confused with certifications. Certificate list show a simple list of achieved assets with a date and time stamp of when an asset was completed in the system by the user.

Below is a brief description of the fields:

Field	Description
Name	The name of the asset.
Earned	The date the asset was completed.
Certification Sent	This will either show the date that the certification was sent or will have a button that the manager can click to set the date to current the current date.

3.19.1 Certification Mailing Address

Some clients opt to send a physical copy of a certification to a user. It will be populated from the address information on the user registration if completed, but can also be edited by the site manager here.



4. Managing Enrollments

Topics Covered in this Chapter

Note that there are many methods of enrolling your users. This chapter covers manual enrollments directly in Informetica from the User's profile.

See the Access Codes chapters for enrollments using an access code.

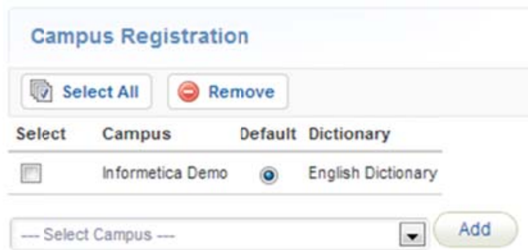
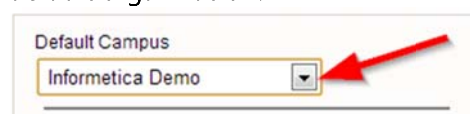
See the Importing Data chapter for instructions on using the import tool for enrollments.

See your own internal documentation for SSO registrations and enrollments.

4.1 Campus Enrollments

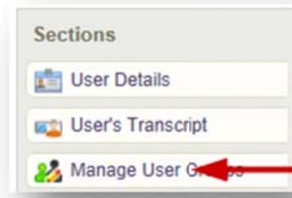
This option is available to site managers, campus admins, and campus managers.

To manage the campuses a user belongs to, first open the user's profile (see User Accounts chapter for details, if needed). Note that only campus admins and campus managers belonging to more than one campus may add users to any of the additional campuses they belong to.

	Site Manager	Campus Admin, Campus Manager
Add campus:	Under the Campus Registration area, choose the campus from drop down menu and select **Add**. You can only add users to one campus at a time from the user's profile.  	Open the user's profile, use the drop down menu under default campus, and then choose the campus to add the user to. Note that this does not remove the user from their former default organization. 
Change default campus:	Open the user's profile, use the drop down menu under default campus, and then choose the new default campus. Note that this does not remove the user from their former default organization.  	Open the user's profile, use the drop down menu under default campus, and then choose the new default campus. Note that this does not remove the user from their former default organization. 
Remove campus:	Under the Campus Registration area, select the box in front of any campus you wish to remove and then select **Remove**. You can also use **Select All** to remove several campuses at a time, but you will be required to keep the user in at least one campus.	N/A

4.2 User Group Enrollments

4.2.1 Managing Groups for One User



To manage the user groups a user belongs to:

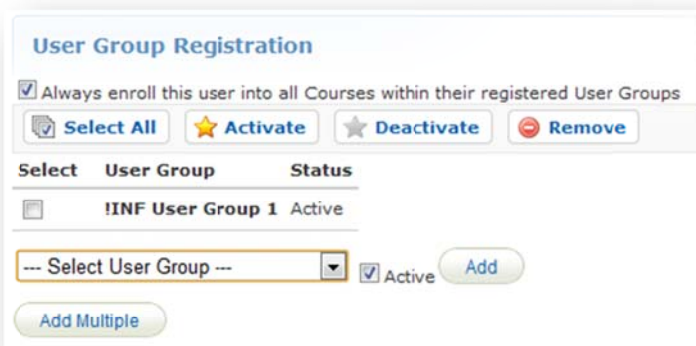
- Site manager: open the user's profile and then select Registration from the Sections menu.
- Campus admin or campus manager: open the user's profile and then select Manage User Groups from the sections menu.

Add user groups: use the campus drop down menu to populate the available users groups for that campus. Select the user groups from the Available Users Group box by clicking to highlight them. Hold down shift or control on your keyboard while clicking to select more than one user group. Click the add button to move the user group to the Linked User Groups box.

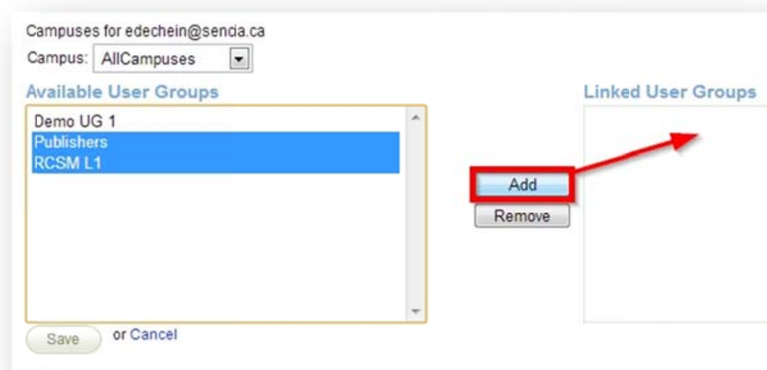
Save button and user will belong to the user groups you moved over to the Linked User Groups box.

Remove user groups: select the user groups from the Linked User Groups box and then click the remove button to move the user groups back over to the Available Users Groups box. Click save and user be removed from the user groups you moved over to the Available Users Groups box.

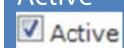
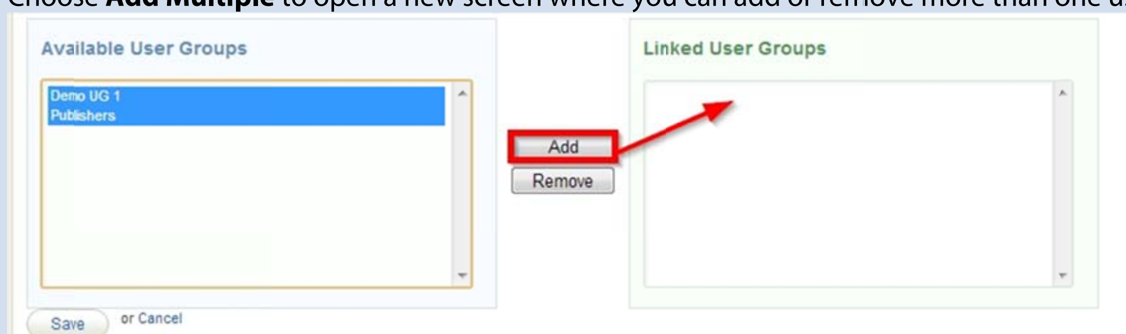
Site manager view



Campus admin / campus manager view



Below is a brief description of the site manager fields:

Filter Option	Description
Always enroll this user into all courses within their registered user group	This option is only seen by configurations where users have automatic access to every course in their user groups. It is enabled by default. Uncheck to disable the feature. Users with this function disabled will need to be manually enrolled into any products that are added to their user groups.
Select All	Choose **Select All** to select all of the visible user groups for this user.
Activate	Select one or more user groups and then select **Activate** to make this group visible on the desktop for any of the desktop accounts. This means that any manage and help desk screens or reports that show users and their user groups will list the activated user groups.
Deactivate	Choose **Deactivate** to make selected groups unavailable for any desktop accounts. Manage pages, helpdesk screens, and reports that show users and their user groups will not list the deactivated user groups.
Remove	Select **Remove** to remove the user from all selected user groups. A user must belong to at least one user group.
Select	Click the checkboxes to select a user group to remove, deactivate or activate.
User Group	The name of the user groups the user belongs to.
Status	Indicates whether the user group is currently active or inactive.
Select User Group	Use the drop down menu to select a user group to add this user to.
Active 	**Active** is selected by default when adding a new user group. If it is checked, then the user groups the user is registered to will be added as active. If the active checkbox is not selected, then the user groups the user is registered to will be added as Inactive. This checkbox indicates to site managers which user groups are available for reporting purposes to desktop users. Users that have the user group registration deactivated would not appear on a report for that specific user group, while users that have the user group registration activated will appear on reports for that specific user group.
Add	Select **Add** to register this user to the selected user group.
Add Multiple	Choose **Add Multiple** to open a new screen where you can add or remove more than one user group at a time. 

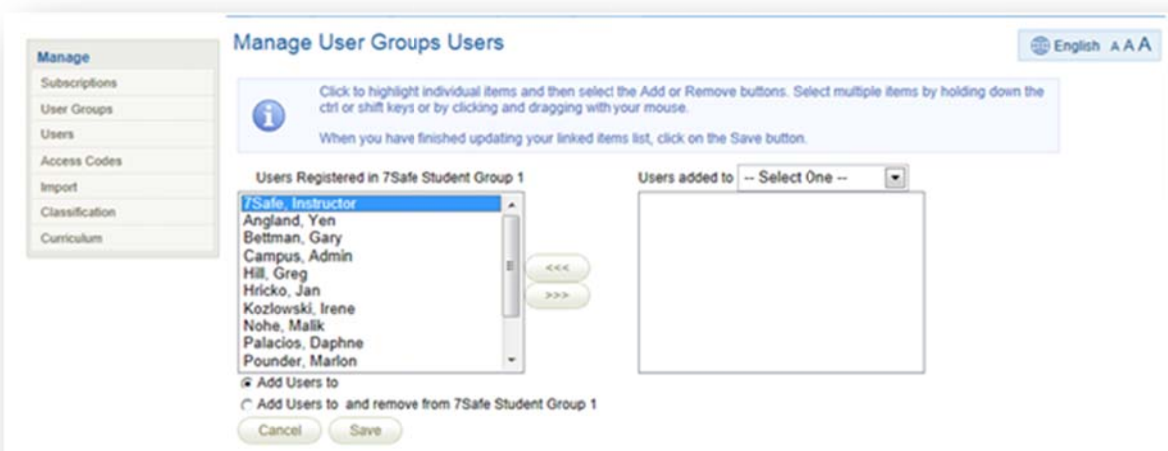
4.2.2 Managing Groups for Multiple Users

There are various methods to enroll users en masse to one more user groups in the system.

Manage User Groups

Campus admins, and campus managers can select the manage tab, choose the User Groups link from the manage menu, and then select the **Add/Remove User** link for the user group for which you want to manage users.

Select users from the left, use the drop down menu to select the target user group, and then use the button with the right arrows to add the users to the new group. You can remove users by selecting them and using the button with the left arrows.

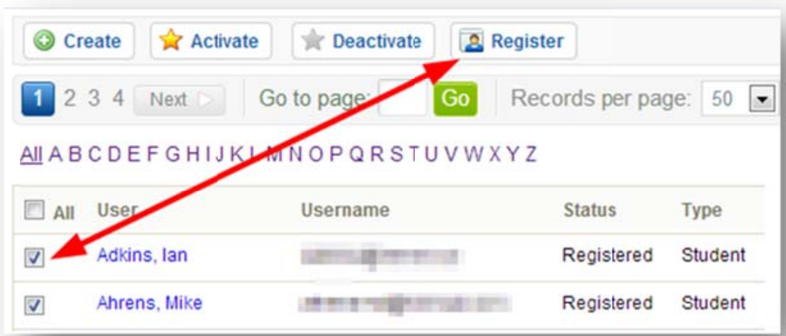


Before you **save**, select the correct option:

- add users to the target user group and let them remain in the original group
- add users to the target user group and remove them from the original group

Access Codes

Campus admins and campus managers can use an access code to enroll multiple users to user groups. Follow the same process as Product Enrollments for campus admins and campus managers. You must know beforehand which access code to use and a site manager must have set up an access code for the purpose of user group enrollment. The access code can have products associated to it or only user groups.



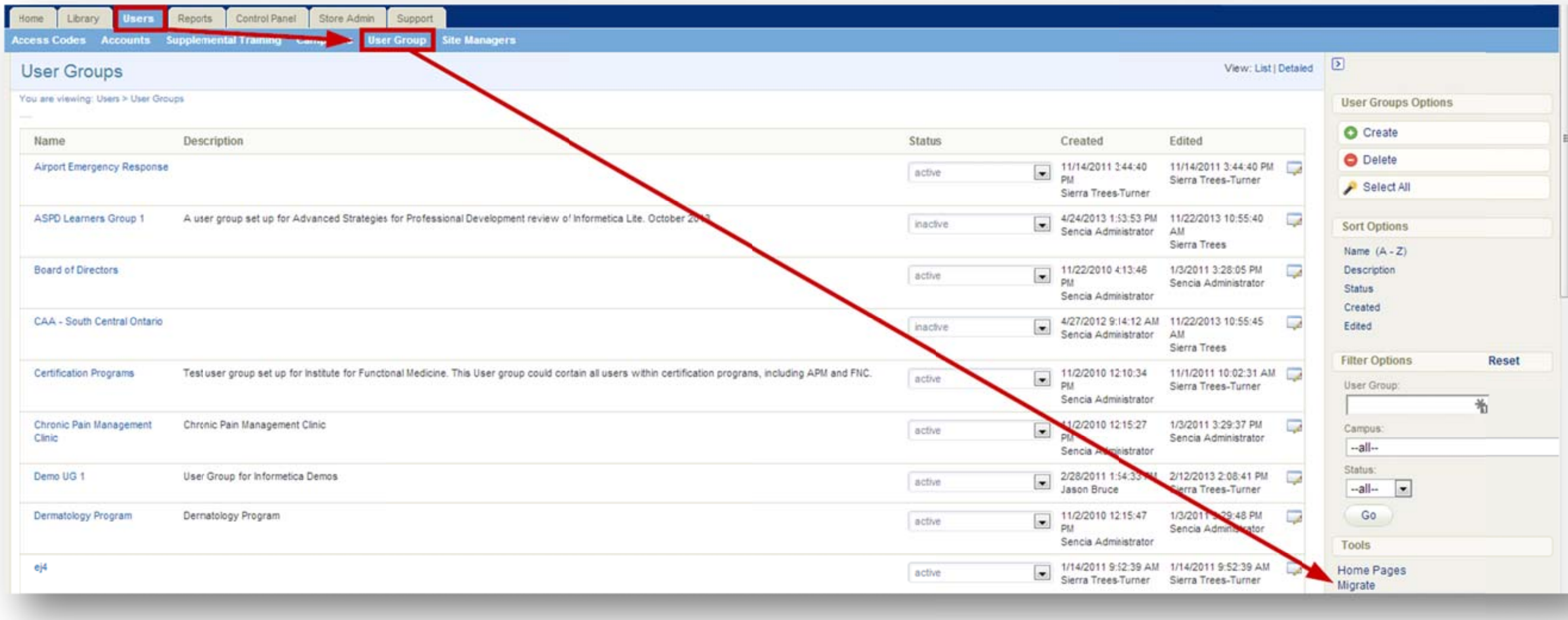
Excel Upload

Site managers and campus admins / campus managers (if configured) can use an Excel spreadsheet and the Users import tool. Visit the Importing Data chapter of this manual to learn more.

4.2.3 User Group Migration Tool

This option is available to site managers.

Navigate to the migration tool by selecting the Users tab, User Groups, and then Migrate from the Tools menu on the right.

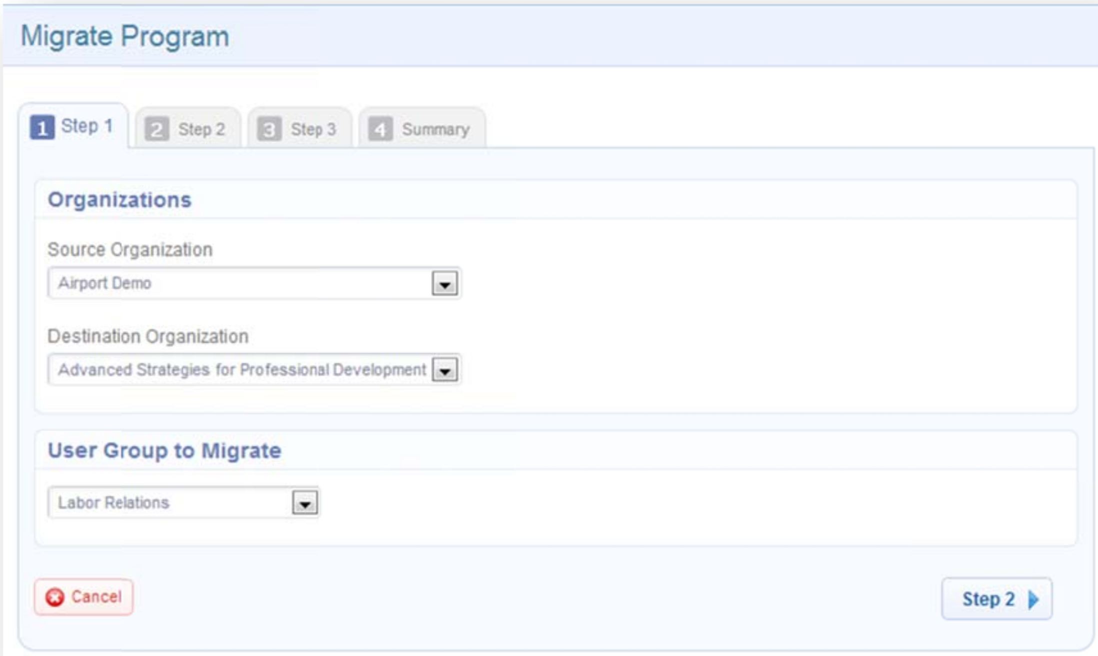


Step 1: Choose the Migration Options

Use the drop down menus to:

- Choose the source Organization, where the User Group currently resides
- Choose the destination Organization, where you would like the User Group to be migrated to

- Choose the User Group to migrate

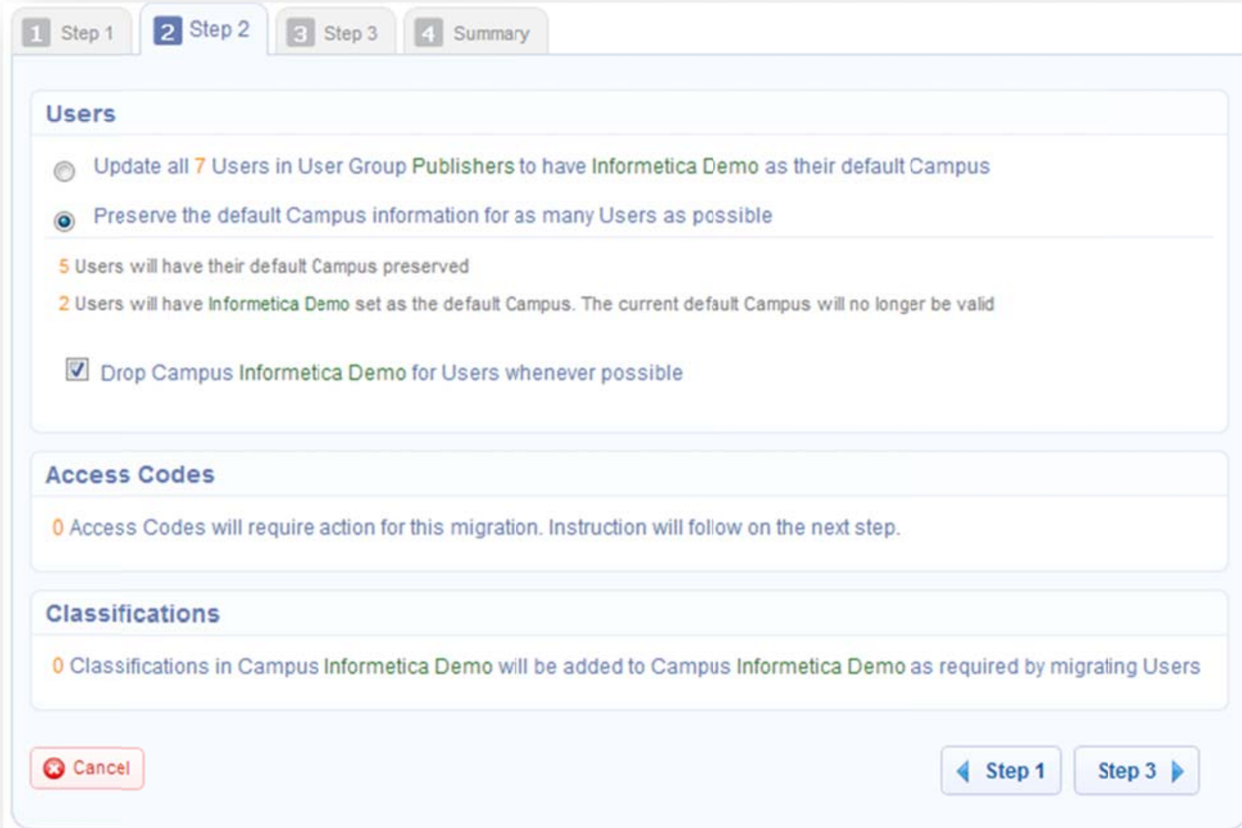


Step 2: Make decisions on the Users Default Organization

You have two choices: either update the Default Organization or preserve the Default Organization.

- Update Default Organization: When you move the user group to a different organization, you might also want to update the default organization. The tool will check for users registered into that user group and if so, you can update their default organization as well.
- Preserve Default Organization: Users may belong to multiple user groups and even though you are migrating one of them, you can opt to preserve their existing user group / default organization relationship. You also have the option to remove the source organization from the

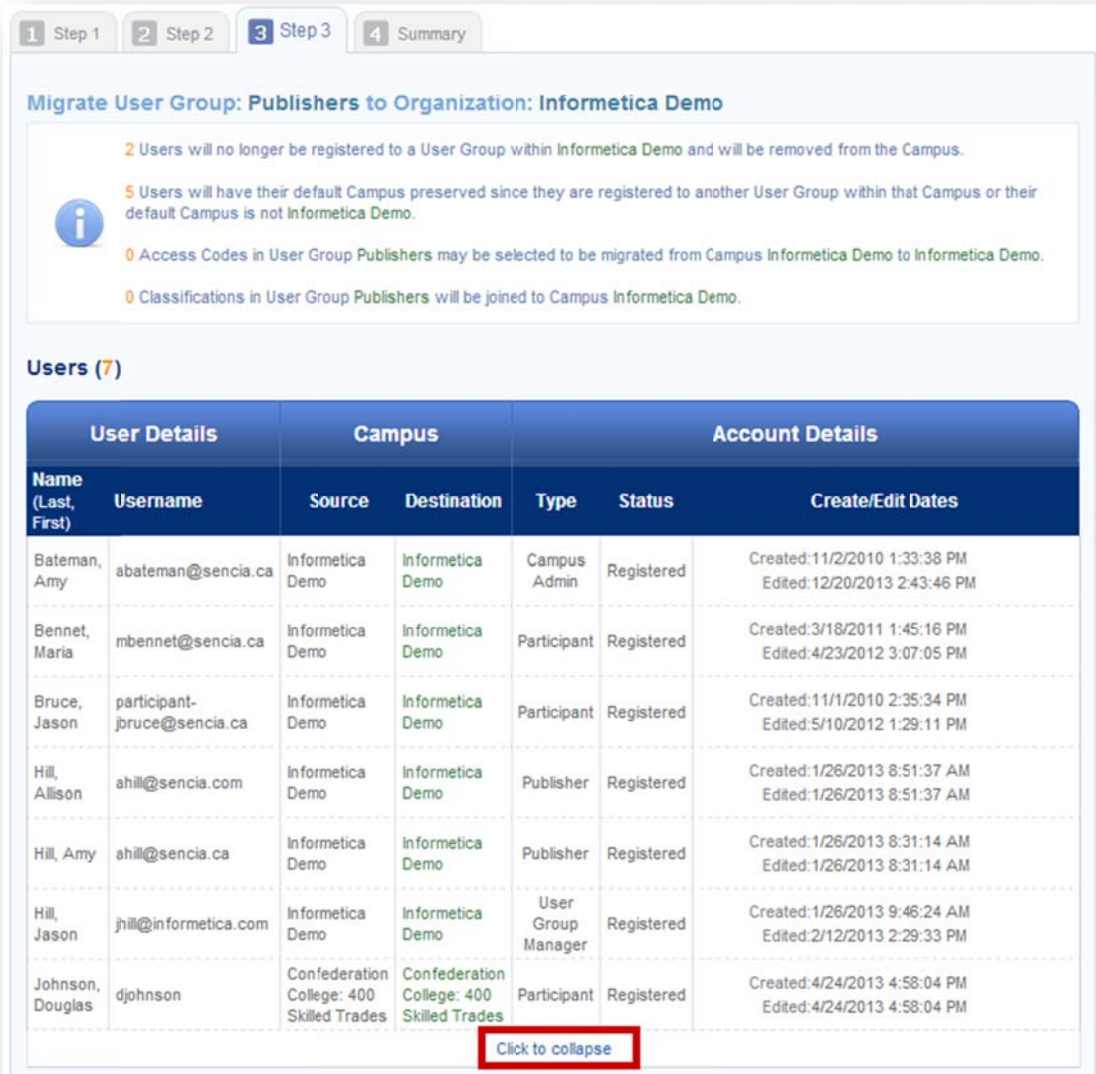
user accounts whenever possible by selecting Drop Campus.



Step 3: Review changes to Users and choose Access Code/Classification Options

- Based on selected options from Step 2, you will get a summary of the changes that are about to happen with the migration

- Expand the users to see what changes will or will not be made to users' default organizations

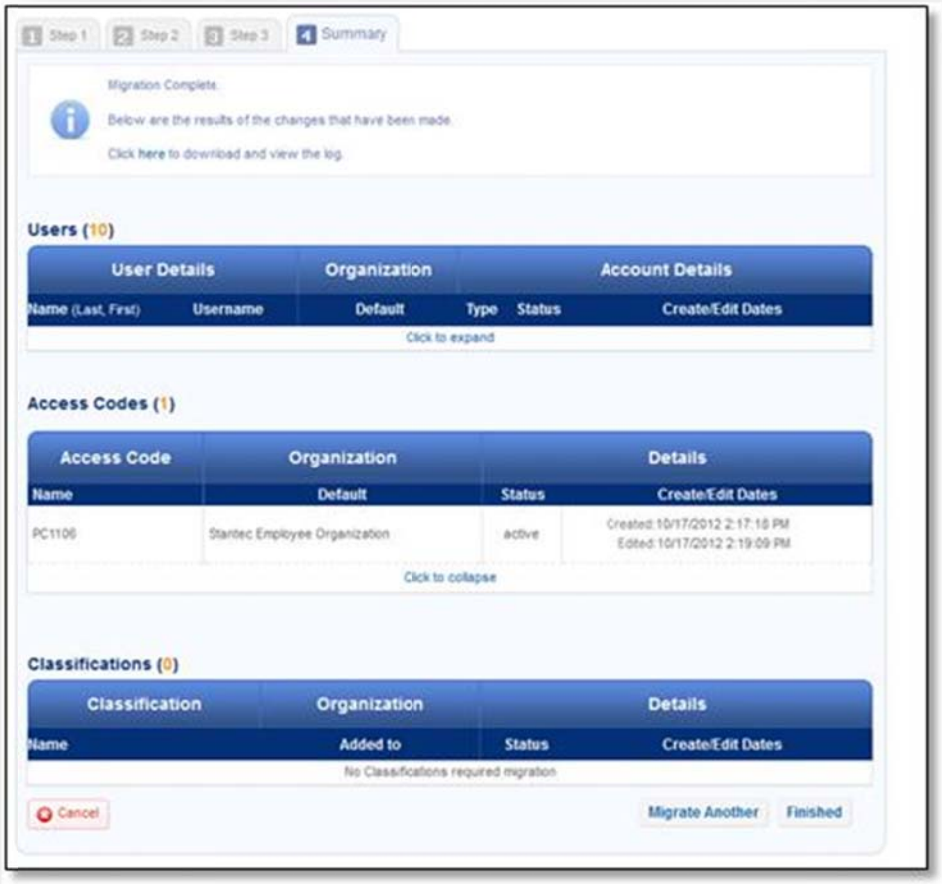


User Details		Campus		Account Details		
Name (Last, First)	Username	Source	Destination	Type	Status	Create/Edit Dates
Bateman, Amy	abateman@sencia.ca	Informetica Demo	Informetica Demo	Campus Admin	Registered	Created:11/2/2010 1:33:38 PM Edited:12/20/2013 2:43:46 PM
Bennet, Maria	mbennet@sencia.ca	Informetica Demo	Informetica Demo	Participant	Registered	Created:3/18/2011 1:45:16 PM Edited:4/23/2012 3:07:05 PM
Bruce, Jason	participant-jbruce@sencia.ca	Informetica Demo	Informetica Demo	Participant	Registered	Created:11/1/2010 2:35:34 PM Edited:5/10/2012 1:29:11 PM
Hill, Allison	ahill@sencia.com	Informetica Demo	Informetica Demo	Publisher	Registered	Created:1/26/2013 8:51:37 AM Edited:1/26/2013 8:51:37 AM
Hill, Amy	ahill@sencia.ca	Informetica Demo	Informetica Demo	Publisher	Registered	Created:1/26/2013 8:31:14 AM Edited:1/26/2013 8:31:14 AM
Hill, Jason	jhill@informetica.com	Informetica Demo	Informetica Demo	User Group Manager	Registered	Created:1/26/2013 9:46:24 AM Edited:2/12/2013 2:29:33 PM
Johnson, Douglas	djohnson	Confederation College: 400 Skilled Trades	Confederation College: 400 Skilled Trades	Participant	Registered	Created:4/24/2013 4:58:04 PM Edited:4/24/2013 4:58:04 PM

- Expand the Access Codes and choose all the access codes you also want to migrate
- Expand the Classifications and choose all classifications you want to migrate

Step 4: Summary and confirmation of changes

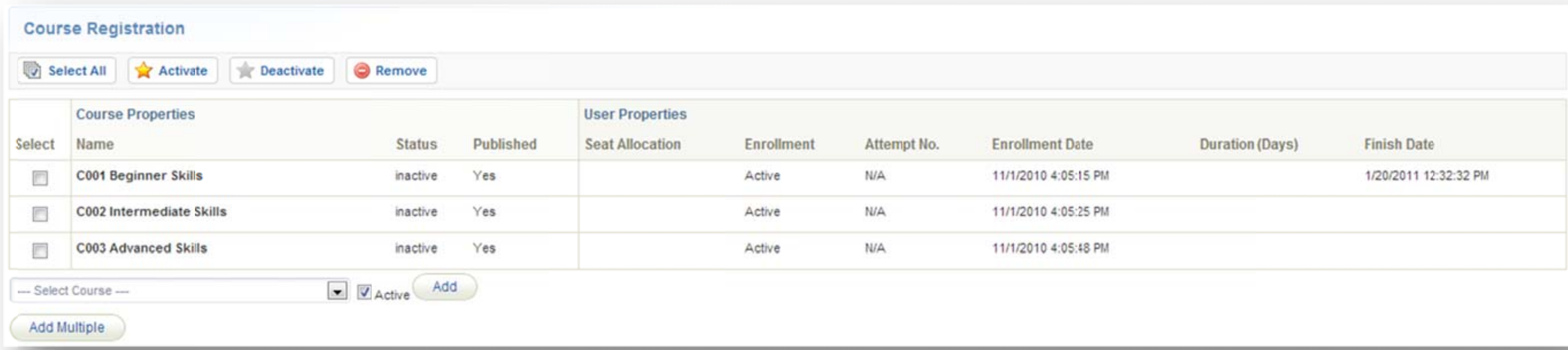
Migration is complete and you will see a summary of what has been changed. You can also download a log of the changes.



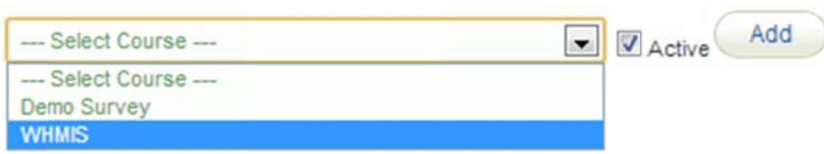
4.4 Product Enrollments

4.4.1 For Site Managers

Navigate to the individual user's registration page (Users > Accounts > Registration). Only products belonging to the same user groups as the user will be available for selection.



For one product at a time, use the drop down menu to select the product you would like to enroll the user to and then select **Add**.



For multiple products, select **Add Multiple** to open a new registration screen. You can also enroll several users at once to one or more products with an Excel spreadsheet using the User Course Registration import tool. Visit the Importing Data chapter of this manual to learn more.

If desired, filter by campus to see only products within user groups assigned to the selected campus. Select the products that you would like to add from the available products on the left and then click "Add" to move the selected products over to the linked products box on the right. Choose **Save** to complete the changes to the product registration.

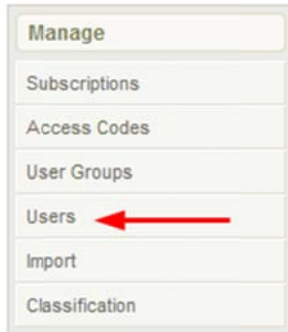
Field	Description
Select All	Click “Select All” to insert a check mark in front of all products in that section that this user is enrolled to.
Activate	Activate sets the current user’s enrollment to products as active (enrolled).
Deactivate	Deactivate sets the current user’s enrollment to products as pending.
Remove	Select one or more products and then select **Remove** to remove the user from the selected product enrolments.
Select	Select the boxes to indicate which items you wish to activate, deactivate or remove.
Topic Properties:	
Name	The title of the product.
Status	Indicates whether the product is currently active, inactive or a template. If the status is inactive or template, then the product is not available to users. (Templates can be seen by Publishers and Campus Admins).
Published	Indicates whether the product is available based on the publish date if the product (published forever or within date range). If the publisher status is no, then the product is not available to users.
User Properties:	
Enrollment	Indicates whether the user’s enrollment to this product is active or pending. If enrollment is pending, then the product is not available to users.
Attempt No.	The number of times the user has attempted this product.
Enrollment Date	The date that the user was enrolled into the product.
Duration	The number of days the user has access to the product.
Finish Date	The date that the user completed the product, if applicable.

Note that your site’s configuration may use multiple product types. Each product type has its own registration area and drop down menus.

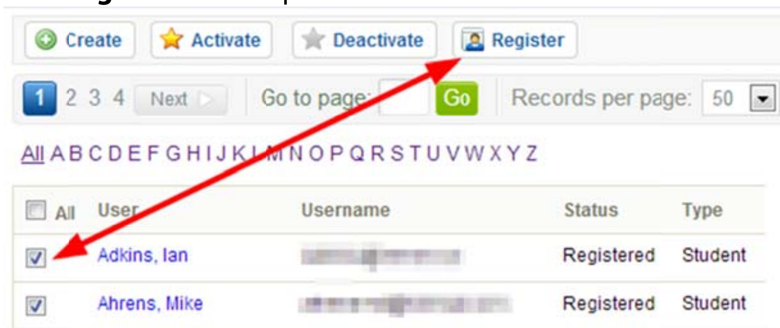
4.4.2 For Campus Admins and Campus Managers

Campus admins and campus managers use access codes to enroll individual users to products. To enroll one or more users to products:

1. **Click the Manage** tab, and then click **Users** on the manage menu on the left.



2. **Select users to enrol** by checking the boxes for each user, and then click **Register** at the top of the list.



3. **Select an access code** from the drop down menu to enroll the user to that course, and then click **Register Now.**

4. **Confirmation and email.** A summary screen will confirm the enrolments and you can opt to automatically send the users an enrolment email.

Sorting and Filtering

To narrow the list of users, use the sorting and filtering options on the menu.

You must have access codes available prior to enrolling users to a product. Visit the Access Codes and Subscriptions chapter of this manual for more information.

4.4.3 Multiple User Enrollments

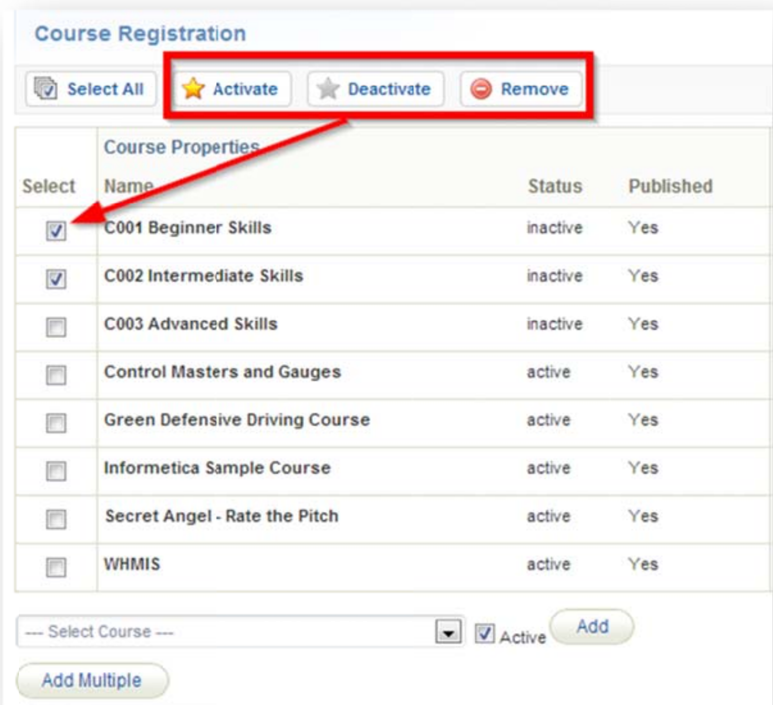
This option is available to site managers, campus admins, and campus managers.

You can enroll several users at once to one or more products with an Excel spreadsheet using the User Course Registration import tool. Visit the Importing Data chapter of this manual to learn more.

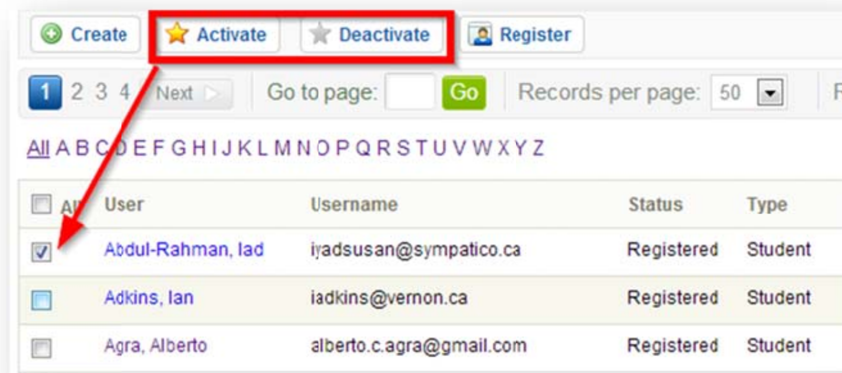
4.4.4 Activate, Deactivate, or Remove an Enrollment

Use the selection boxes to indicate which items you wish to activate or deactivate. Site managers also have the ability to remove a product enrollment.

Site Managers



Campus Admins and Campus Managers



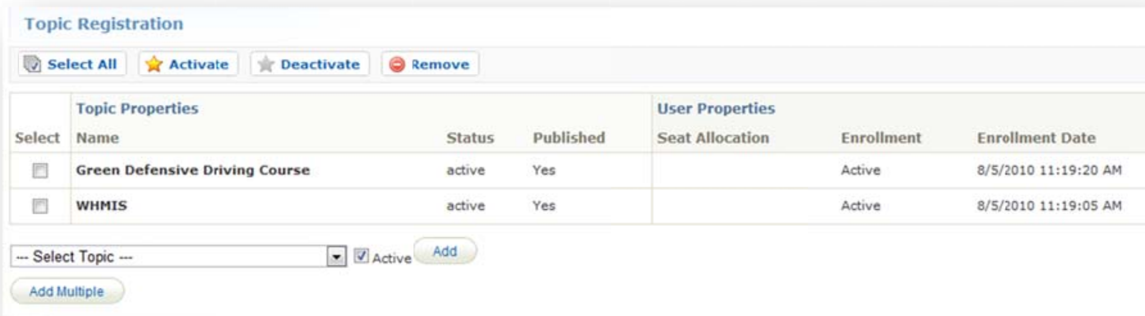
Note that your site's configuration may use multiple product types. Each product type has its own registration area and selection boxes.

4.4.5 Product Disenrollments

4.4.5.1 Individual Disenrollments

This option is available to site managers.

Navigate to the individual user's registration page (click Users > Accounts > Registration). Select the products that you would like to remove from the user's enrollments and then click "Remove".



Note that your site's configuration may use multiple product types. Each product type has its own registration area and drop down menus.

4.4.5.2 Multiple Deactivations

This option is available to site managers, campus admins, and campus managers.

You can deactivate the registration for remove multiple users from one or more products all at once using the User Course Registration import tool. Using the duration field, add a number of days and then users will no longer have access to the product after the entered number of days have passed. You can add this value to your Excel spreadsheet upload or directly into the import tool itself.

The import tool is covered in the Importing Data chapter of this manual, including details on each step and cautions. If you do not see User Course Registration import option, contact your site manager. If you are the site manager, contact a Sencia Administrator to have the User Course Registration tool activated for your system.

5. User Groups

Topics Covered in this Chapter

5.1 What is a User Group?

User groups are the primary method of managing users in Informetica. Users are grouped by organizations / campuses and then divided further into user groups. There is no limit to the number of user groups each user may be assigned to. User groups are typically named in a logical group of users. For example, a user group may be named based on a skill, a job role, a department, a location or even a division.

User groups are used in many important aspects of Informetica such as product registrations, reports, home pages, and access codes. For example, a user's catalogue is limited to the products assigned to their current user groups. Manager reports are also restricted by campuses and user groups.

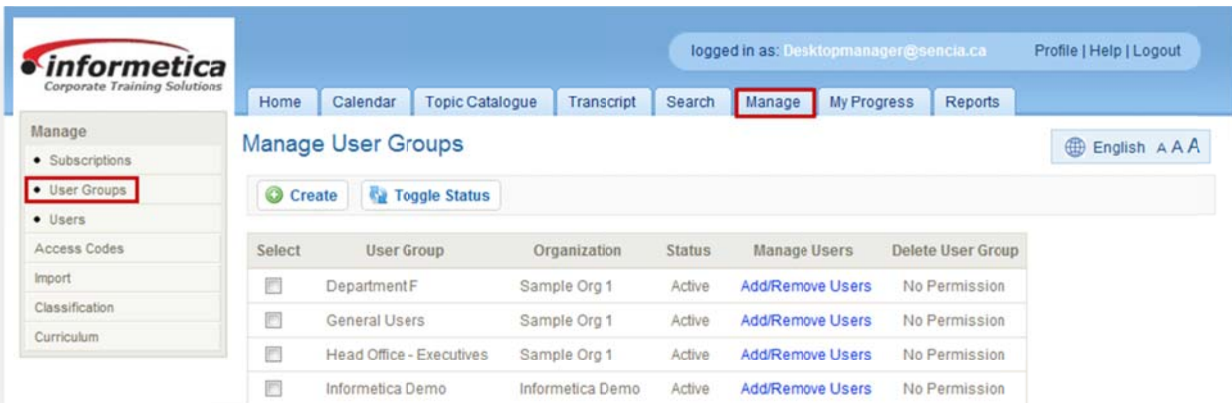
5.2 The Manage Users Groups Page

The manage user groups page allows you see which user groups are assigned to your organization(s). You can add and remove users to these user groups, create new user groups and activate or deactivate user groups.

5.2.1.1 Desktop and Organization Manager Navigation

Click the manage tab and then the user groups link from the manage menu. The page will show you the names of all of the user groups you have been assigned to as well as which products (the example below calls these topics) and bundles are associated with them.

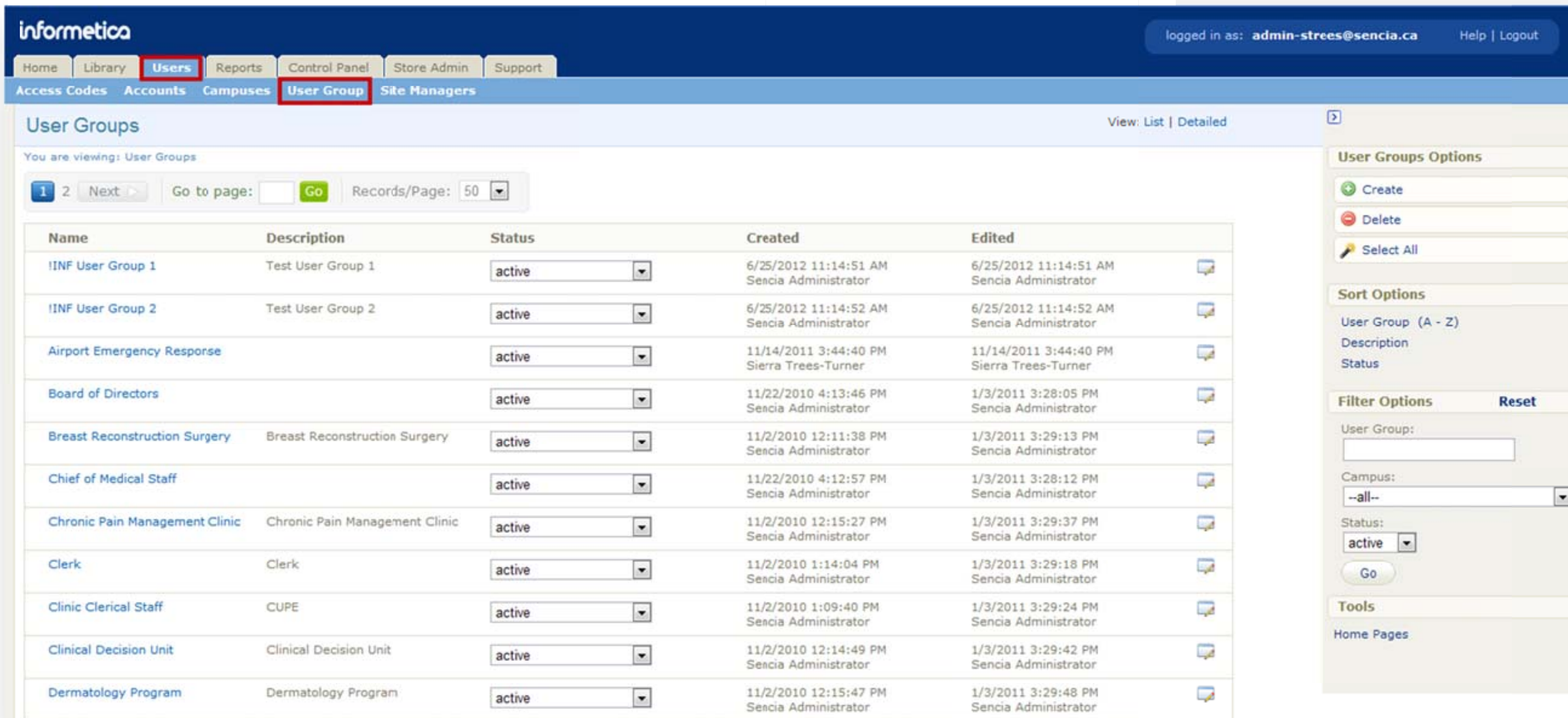
Desktop and Organization Manager View



5.2.1.2 Site Manager Navigation

Click the user tab and then the user group link. The page will show you the names of all of the user groups already set up as well as which products (the example below calls these topics) and bundles are associated with them.

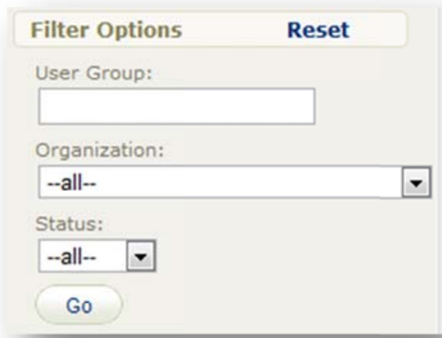
Site Manager View



5.3 Sort and Filter User Groups

This option is available only to site managers.

To change the order in which the list of user groups is displayed, click any of the options under the sort options menu on the right hand side: alphabetically, by description or by status (active or inactive). User groups are sorted alphabetically by default. To show only specific user groups, use the filter options menu on the right hand side. This is particulary useful if you have a large number of user groups set up.



Below is a brief description of the fields:

Filter Option	Description	Click Go
Reset	Choose the reset link at the top of the filter options menu to remove any filters.	Click Reset
User Group	Enter a word or two that is contained in the name of the user group.	Required
Organization	Use the drop down menu to see only user groups assigned to a specific organization.	Required
Status	Use the drop down menu to see only user groups that are active or inactive.	Required

5.4 Create a User Group

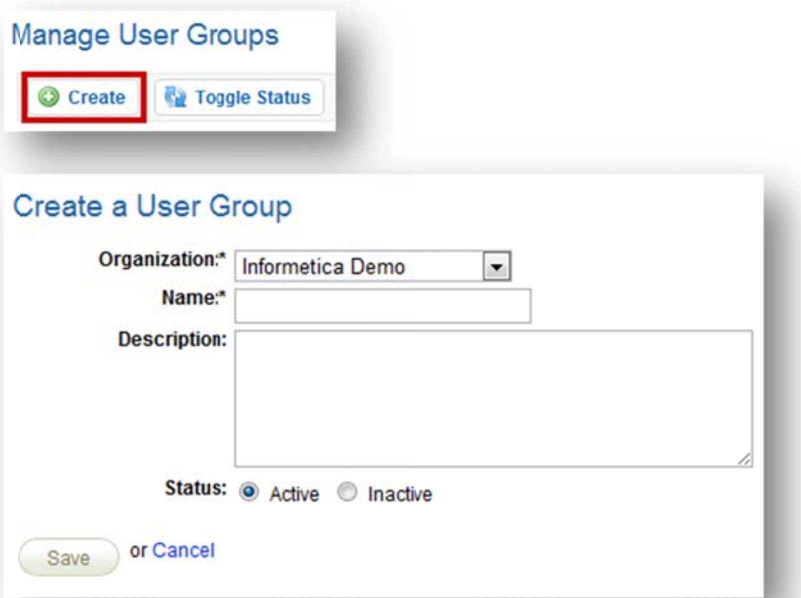
When creating a new user group, make sure you also:

Step 1
- Add the user group to any certifications and check for eligible users, if necessary

Step 2
- Add the user group to any product bundles, if required.

For Desktop and Organization Managers

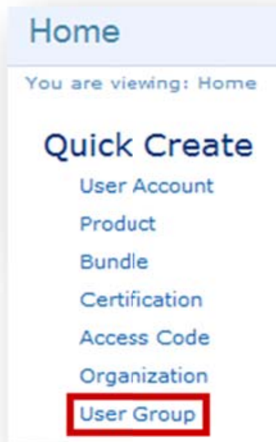
From the manage user groups page, click on the create button near the top of the page to open the Create a User Group screen. Enter the information onto each field and then save. Below is a brief description of the fields:

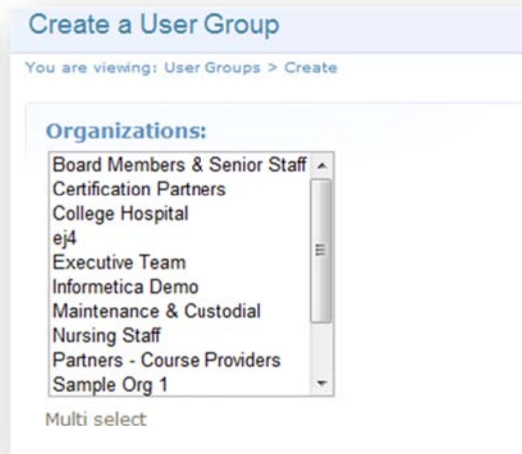


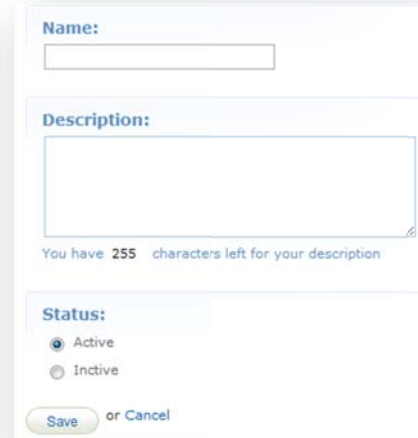
Field	Description	Input
Organization	Select an organization to link the new user group to.	Required
Name	Enter a name for the user group.	Required
Description	Enter a description for the user group if desired. The description is not publicly displayed.	Optional
Status	Set the status of the user group to either active or inactive.	Required

For Site Managers

Click on the create link in user group options menu on the right. Alternatively you can create a new user group from the home page under quick create by clicking user group. Either method will bring you to the create user group screen.







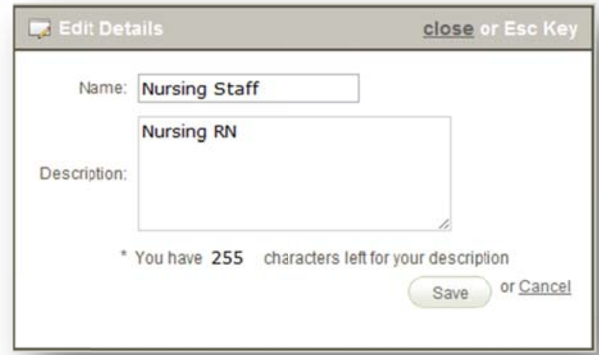
Below is a brief description of the fields:

Field	Description	Input
Organization	Select one or more organizations to link the new user group to. This can always be changed later. Click the mouse with the CTRL button held down to select more than one organization.	Required
Name	Enter a name for the user group.	Required
Description	Enter a description for the user group. The description is not publicly displayed.	Optional
Status	Set the status of the user group to either active or inactive.	Required

5.5 Edit User Group Details

This option is available only to site managers.

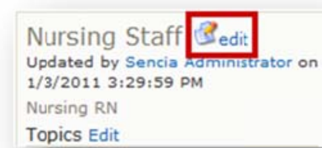
Click on name of the user group from either list or detailed view or click the edit link edit in the user group's information box. This will open an edit page where you can then modify the name and description. After saving, you will be returned to the main user group page.



5.6 Edit User Group Products

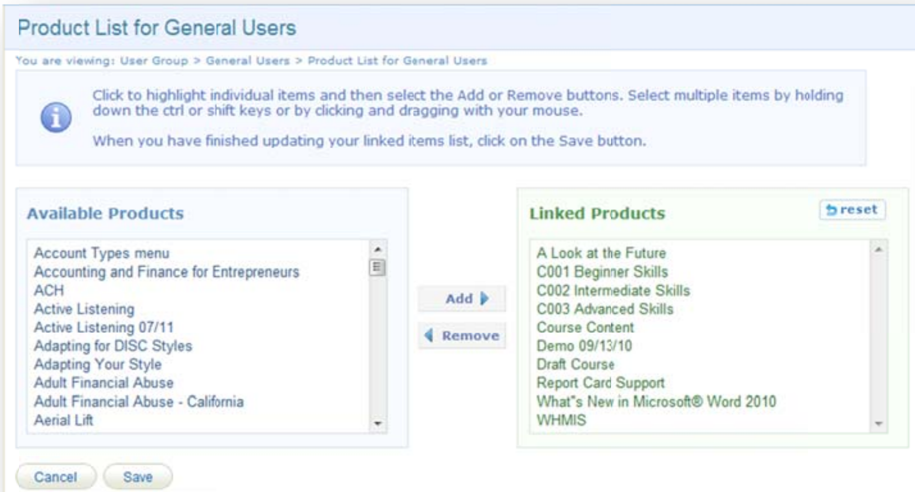
This option is available only to site managers.

From detailed view, click on the product's edit link in the user group's information box, or, from list view, click on the edit button. This will open the product list page for the user group where you can link specific products to the user group.



For systems that are configured to automatically register users to all products within their assigned user groups, adding any new products to a user group will automatically enroll all users into the newly added products.

Select the products from the available products on the left and then click the add button to move them to the linked products on the right. This will assign them to the user group. Click the save button to finish assigning products and return to the main user groups page.



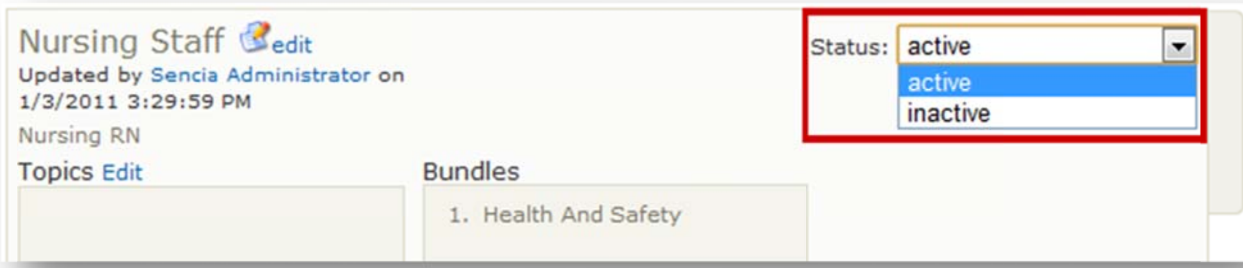
5.7 Activate/Deactivate a User Group

For Desktop and Organization Managers

From the manage user groups page, select the user groups you would like to activate or deactivate by clicking the check boxes in front of them. Click the Toggle Status button near the top of the page. Any active user groups selected will become inactive and any inactive user groups selected will become active.

For Site Managers

To change the status of a user group, use the drop down menu within the information box to select active or inactive. Changing the drop down selection changes the status automatically; there is no confirmation or save to complete the change.



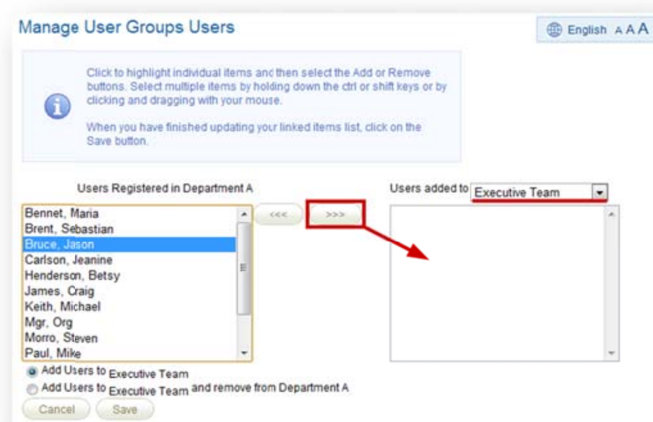
5.8 Add or Remove Users from User Groups

From the manage user groups page, click the Add/Remove Users link next for the appropriate user group. This will open the manage user groups page where you can see a list of all users registered to the selected user group.

5.8.1 Add Users to a User Group

This option is available only to campus admins and campus managers.

Select the users that you want to add to a new user group from the “Users Registered in Department A” box on the left. The names of the user groups you select will be populated on this screen. Use the drop down menu to select a target user group to add the users to (Executive Team in this example). Select the first radial dial below the list of names, “Add Users to Executive Team”. The name of user group you actually select will appear here.



Click the button with three arrow heads facing to the right >>> to move the user names over to the “Users added to Executive Team” box. If you changed your mind or accidentally selected the wrong user, you can select the user name from the “Users added to Executive Team” box and click the button with three arrow head saving left <<< to remove them before you save. Click the save button to assign the users to the Executive Team user group. These users will also remain registered to the Department A user group.

5.8.2 Remove Users from a User Group

This option is available only to campus admins and campus managers.

Select the users that you want to remove from the “Users Registered in Department A” box on the left. The names of the user groups you select will be populated on this screen. Use the drop down menu to select a target user group to add the users to (Executive Team in this example). Select the second radial dial below the list of names, “Add Users to Executive Team and remove from Department A”.

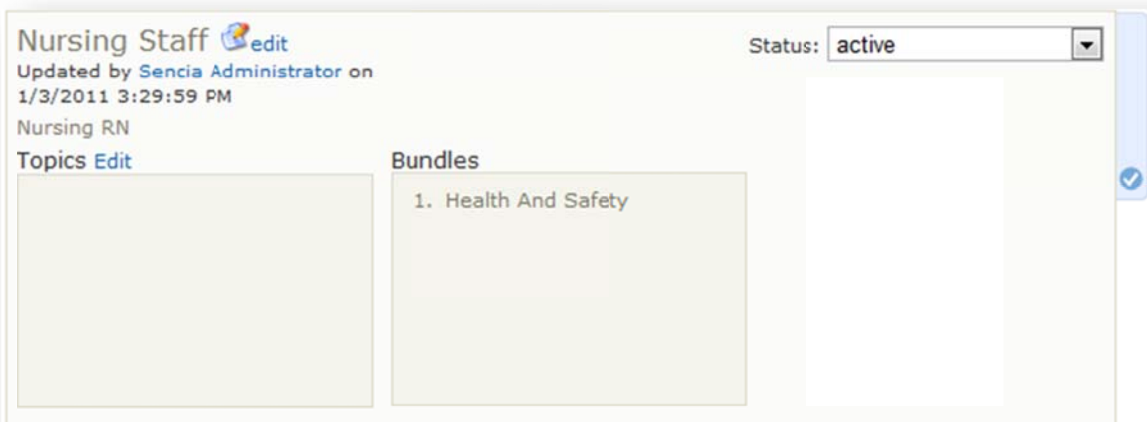
Click the button with three arrow heads facing to the right 

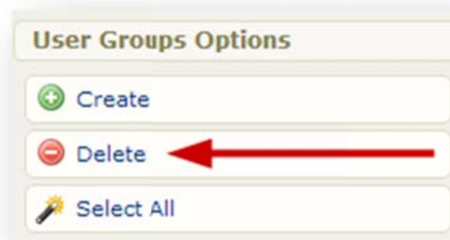
to move the user names over to the “Users added to Executive Team” box. If you changed your mind or accidentally selected the wrong user, you can select the user name from the “Users added to Executive Team” box and click the button with three arrow head saving left 

to remove them before you save. Click the save button to assign the users to the Executive Team user group and remove them from the Department A user group.

5.9 Delete User Groups

Select the user group you would like to permanently delete by clicking inside of the user group’s information box. The tab on the user group information box will change to blue and will have a white checkmark in it to show that it is selected. Choose **Delete** link in the user group options menu. After deleting, you will be returned to the main user group page.





6. Calendar, Tasks, News, and Forums

Topics Covered in This Chapter

6.1 Notification Legend

Several types of notifications can be displayed on a user's desktop calendar or in the News & Task box on their home page. Some events are created by managers, publishers, or instructors, some are personal tasks created by the user, and some are automatically added to the calendar based on the event type and date.

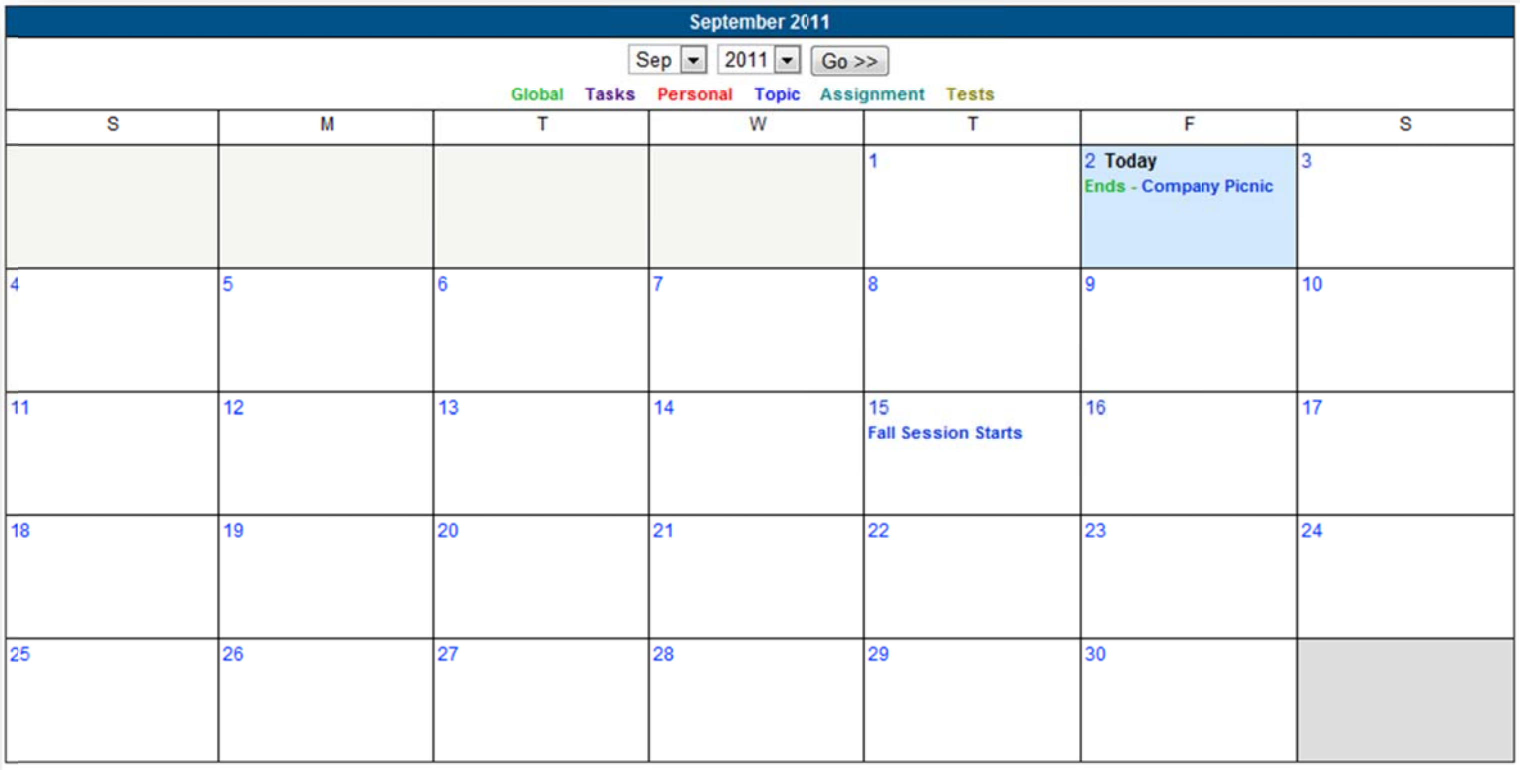
Type	Description	Created by
Assignment	Assignments are added to the calendar automatically based on the due date. **These events are displayed on the calendar in teal**	Automatically Created
Global	Global events are displayed on the calendar for most registered users as well as in the news box on user's home pages. **These events are displayed on the calendar in green**	Site Manager
Personal	A personal event can only be viewed by the user who created it. These are personal reminders for the user and are not necessarily related to their course material or training. **These events are displayed on the calendar in red**	Any User (except Help Desk Users)
Tasks	Tasks are displayed on the calendar for relevant users as well as in the news box on user's home pages. **These events are displayed on the calendar in purple**	Any User (except Help Desk Users)
Tests	Tests are added to the calendar automatically based on the date. **These events are displayed on the calendar in gold**	Automatically Created
Course	Course calendar entries represent the start and end date of any particular course. **These events are displayed on the calendar in blue**	Publishers and Instructors
User Group	This event item will be displayed in the news box on the home page of all users in the particular user group to which it was assigned.	Site Managers and Publishers

6.2 Calendar

Some Informetica systems feature a calendar where users can view events, tasks, and deadlines for courses, assignments, modules, and tests. Items may be added automatically based on their due dates or scheduled by managers, publishers, and instructors. See the News and Task Box section to learn how to add personal tasks to the calendar.

Access the Calendar:
Click the Calendar tab from the main navigation bar at the top.

Site Managers:
From the control panel, select the calendar link.

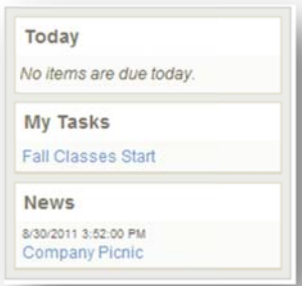


By default the calendar shows the current month with the current day highlighted in blue. To view a month that is not the current month, use the drop down menus to change the month and year and then press the go button. Click on any event to view more details, who created the event, and the start and end dates.

6.3 My Tasks and News Box

This view is not available to site managers.

Some Informetica systems feature a box on the home page that shows news and tasks relevant to the user.



6.3.1 Today

Today automatically shows assignments and evaluations that have a deadline of today (e.g. the publishing date ends on today's date).

6.3.2 My Tasks

My Tasks keeps track of to-do lists and personal items within Informetica. Tasks may be added by you, a manager, publisher, or instructor. Tasks that you add personally are private and you can opt to view them on the calendar in addition to My Tasks.

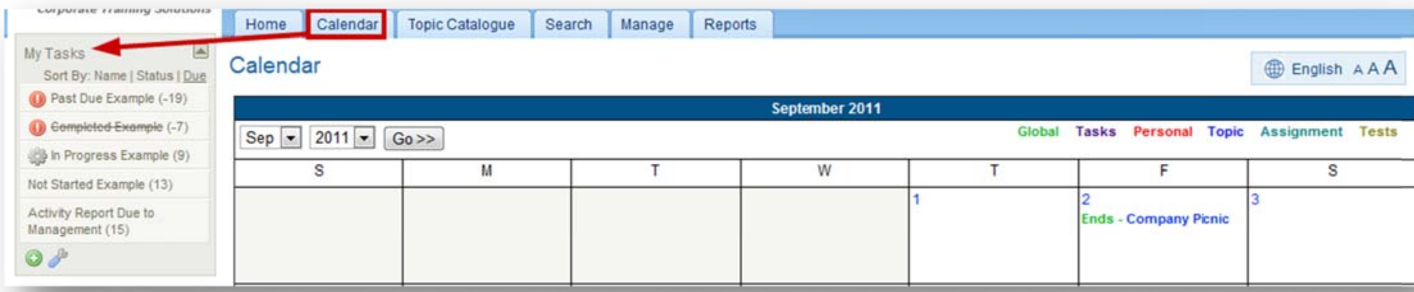
6.3.3 News

News items are added by a manager, publisher, or instructor and show items within a set date range. For example, an event scheduled from March 1-March 15, will not appear in the news box before March 1 or after March 15. The news box lists a maximum of 10 news items at once.

6.3.4Managing Tasks

This view is not available to site managers.

Open the calendar to view and manage tasks. Click the to collapse or expand the list. The numbers to the right of the tasks indicate how many days until the task is due. A negative number is the number of days it is past due.



Task Icon	Description
No icon	Items that you have not started.
	Items that are in progress.
	Items that are due today or past due.
~~Completed Example~~ (5)	Lined out Items have been completed. Completed items will stay at the top, even when sorted.

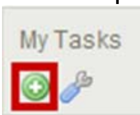
6.3.5 Sort Tasks

Tasks are sorted automatically by due date, but you can re-sort the list to show the tasks alphabetically by name, completion status, or due date. To interact with My Tasks, click the calendar tab from the main navigation bar and use menu on the left. Tasks sorted by status show completed items first, then not started and then in progress.

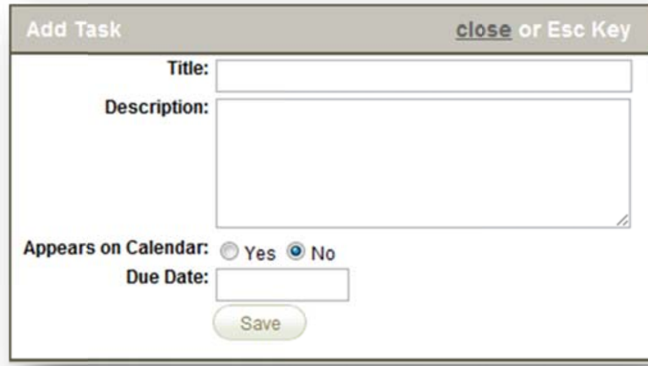
6.3.6 Add Tasks

Participants can only add personal tasks.

1. Open the calendar
2. Click the plus symbol at the bottom of the My Tasks menu



3. Complete the form (an example is shown at right)
4. Save

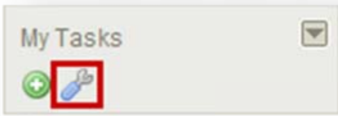


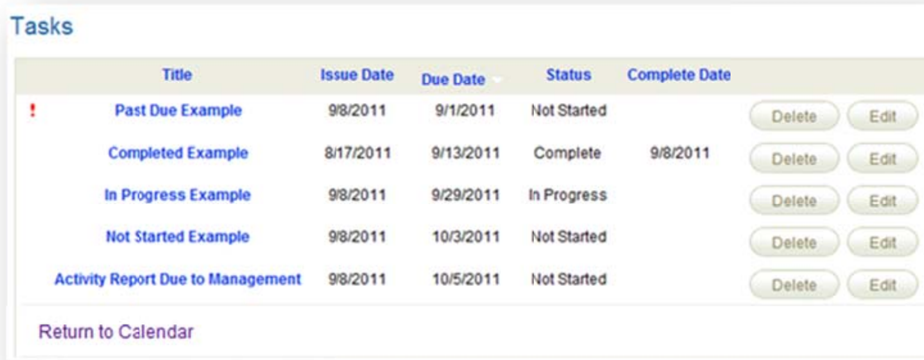
Below is a brief description of the fields.

Field	Description
Title	Add a name for your task.
Description	Enter a description for the task, if desired.
Appears on Calendar	Select yes to see this task on the calendar. Select no to see this task only on the my tasks list.
Due Date	Enter the date by which this task must be completed.
Save	Click Save. Upon saving, the event will be viewable on the my task list and on the calendar if you selected that option.
Close or ESC	Click the close link at the top or press the ESC key to cancel the creation.

6.3.7 Delete and Edit Tasks

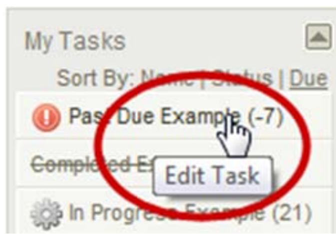
Click the wrench at the bottom of the My Tasks menu to see a list of tasks. You can edit or delete tasks from this page.



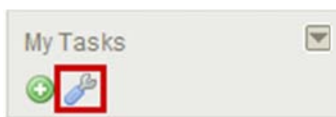


You can edit a task's title, description, status, calendar presence, or due date. There are three ways to edit a task. Make sure to save your changes.

1. Click the name of the task from My Tasks to open the edit task page.



2. Click the wrench at the bottom of My Tasks, and then click the edit button to edit that task.



3. Click the name of the task on the calendar. This will open the manage tasks page. Click the edit button to open the edit task page.

Below is a brief description of the fields:

Field	Description
Title	This is the name of the task.
Issue Date	This is the date that the task was created.
Due Date	This is the date by which this task must be completed.
Status	This indicates if the task is completed, in progress or not started.
Complete Date	If the task is complete, this indicates the date it was completed.
Delete	Click the delete button to remove a task.
Edit	Click the edit button to make changes to the task's title, description, status, appearance on the calendar or due date.

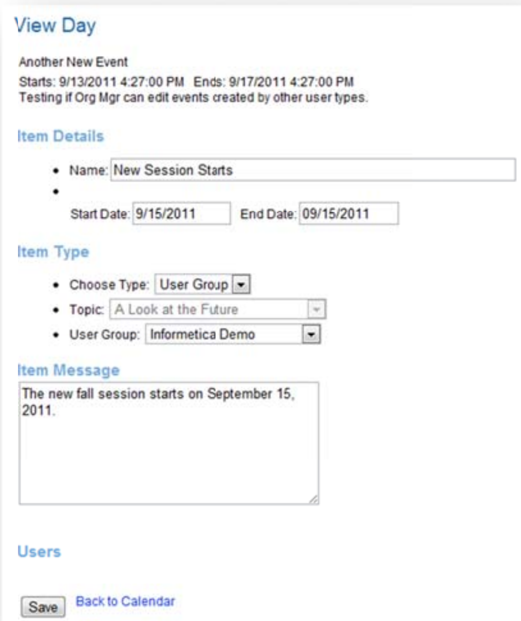
6.4 Managing Calendar and News Events

This option is not available to participants.

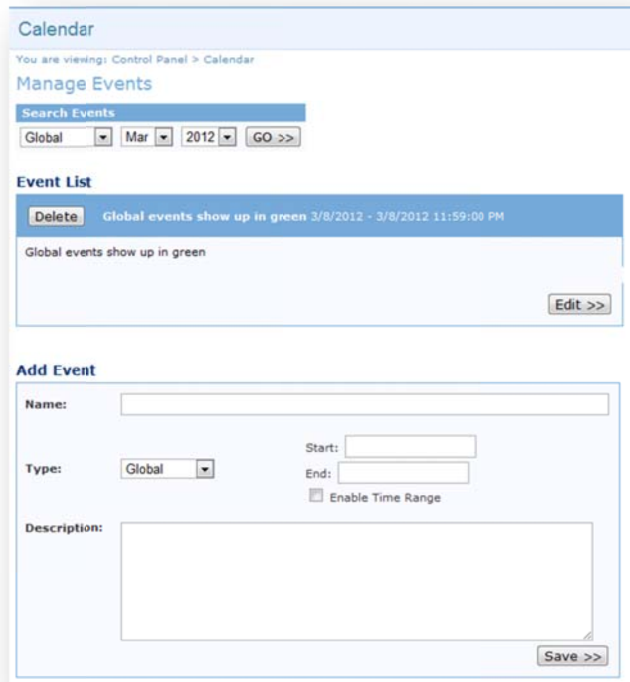
6.4.1 Add and View Events

You can create events and announcements for other users.

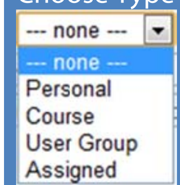
Add and View: From the calendar, click the date for the new event to open the View Day page, fill out the fields (described below), and then save. Existing events, if any, will show up at the top. Item details, item type and item message must all be completed to create a new event.



Site Managers: Click the calendar link, fill out the Add Event fields (described below), and then save. Existing events, if any, will show up under Event List and can be searched for by type and date.

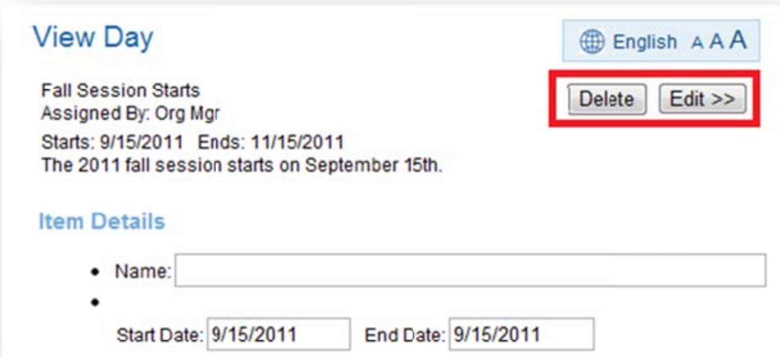


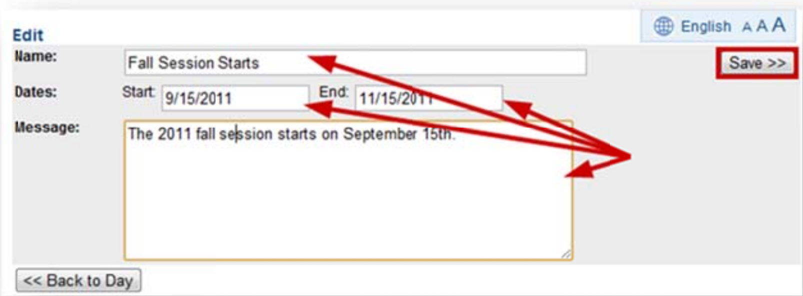
Below is a brief description of the fields:

Field	Description
Search Events	Select an event type, month, and year from the drop down menus, and then click the go button. **Site manager only.**
Event List	A list of events for the current month shows near the top of the page. If there are no events for the current month, you will see the message: "*There are currently no items for this date.* "
Name	Add a name for your event.
Start Date	Enter the start date for the event.
End Date	Enter the end date for the event.
Enable Time Range	You can add a time range to your dates by checking the box before "enable time range". **Site manager only.**
Choose Type 	Choose one type from the drop down menu. Note that not all options below may be available to you. Personal When this type is chosen, it will create a personal event that only you can view; **available to all desktop users** Course When this type is chosen, it will create an event that all users enrolled to the product selected from the Topic field can view; **available to campus admins, campus managers, user group managers, publishers, and instructors** User Group When this type is chosen, it will create an event that users belonging to the selected user group can view; **available to site managers, campus admins, campus managers, and user group managers** Assigned When this type is chosen, it will create an event that only the users selected in the users listing at the bottom of the page can view. **available to campus admins, campus managers, user group managers, and publishers** Global When this type is chose, it will create an event that every desktop user in the system can see. Global events are displayed on the desktop calendar for most registered users as well as in the news box on user's homepage. **available to site managers**
Topic	If you have selected course from the choose type field, then use this drop down menu to select the product. Everyone registered to the selected product will be able to view the event.
User Group	If you have selected user group from the choose type field, then use this drop down menu to select the user group. Everyone registered to the selected user group will be able to view the event.
Message/Description	Enter the text you wish to appear for the event.
Users	If you have selected assigned from the choose type field, then this area will be populated with a multiple select box based in the user groups you belong. Select which users you want to be able to view the event.
Save	Click Save. Upon saving, the event will be viewable on the calendar by the selected users.

6.4.2 Edit and Delete Events

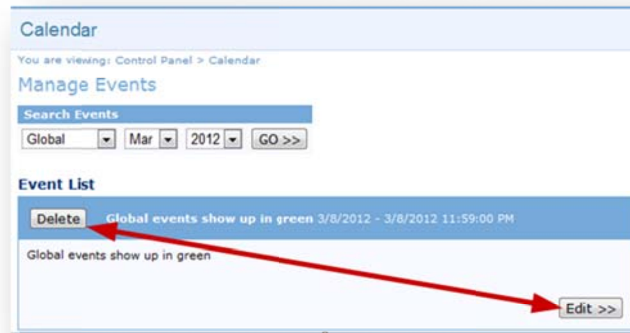
Edit: You can edit the details on events that you have created. Click the event from the calendar to open the View Day page, click the edit button on the top right, make your changes, and then save. You cannot edit global events that are set up by site managers.





Delete: You can delete an event that you have created. Click the event from the calendar to open the View Day page, and then click the delete button on the top right. You cannot delete global events that are set up by site managers.

Site Managers: Click the calendar link and then edit or delete events directly from the Event List. A list of events automatically shows for the current month, but you can also use Manage Events to search for specific events and events in different months: select type, month, and year from the drop down menus, and then click the go button.

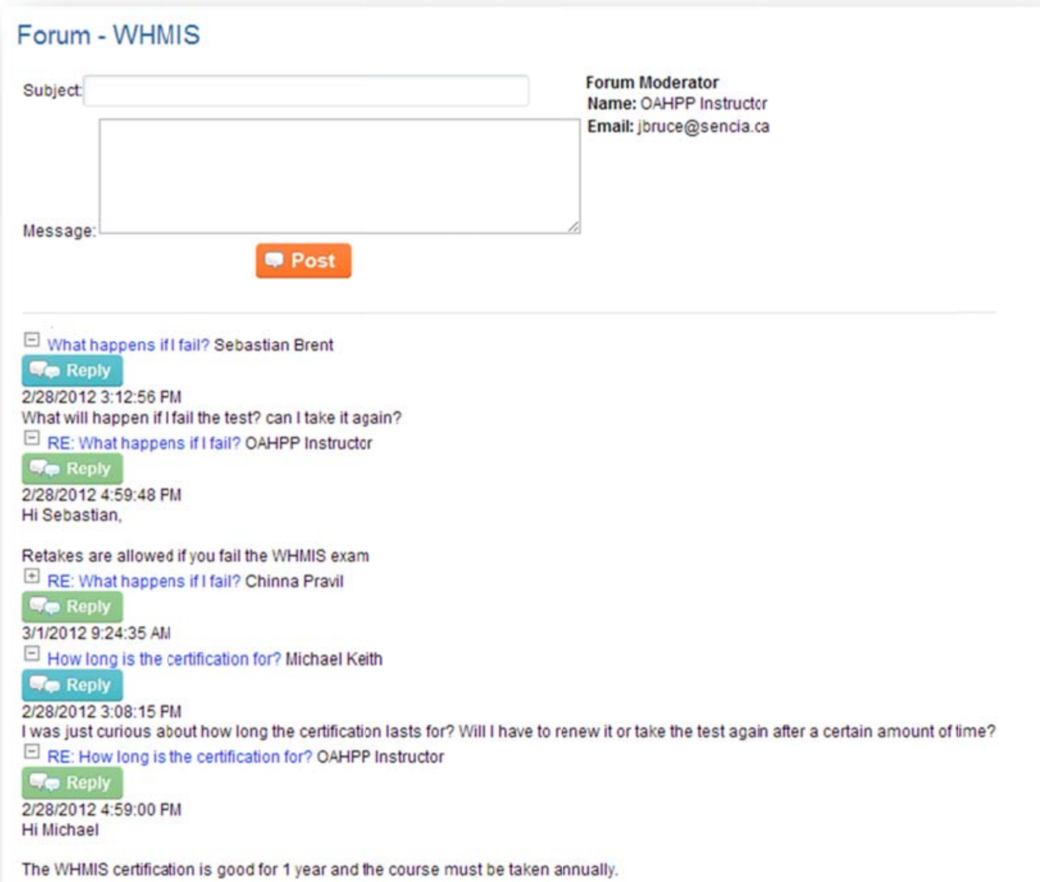


6.5 Product Forums

This view is not available to site managers.

Some Informetica systems use a forums feature. Click the name of any course from your home page to see the Utilities menu and then click the forum link to open the forum board for that course. Everyone with access to the course will be able to read the forum posts.

- **Post a new subject:** fill out the subject and message and then click "Post".
- **Respond to a post**: click "Reply" next to the post you want to respond to, create your message, and then click "Post Reply".
- **Read full posts:** click ⊞ (plus symbol) to read full posts.

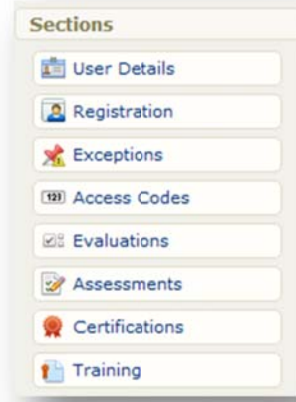


7. Access Codes

Access codes can be used for things like quick registering a group of users to new courses or to guide a new user through the registration process and give them immediate access to the groups and courses they need.

Topics Covered in this Chapter

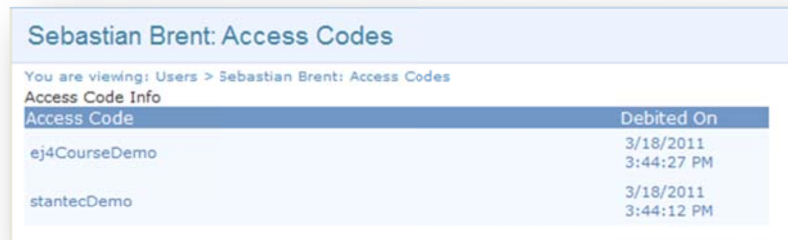
7.1 What is an Access Code?



An access code is a group of alphanumeric characters that are unique to specific user groups and products. You can create and assign access codes to users who can in turn use the code to register to these user groups and products automatically. Access codes can be utilized in several ways:

- Users who do not already have an account within the system can enter their access code from the login screen. This will prompt them through a registration wizard.
- Users who already have an account can enter their access codes after they log in to register to new products.
- Non-site managers can register users to products manually using an access code. Instructions for non-site managers to manually register users to products can be found in the Manage Users chapter under Register Users to Products.

To see a list of access codes any access codes that have been used either by the user or by a manager on the user's behalf, open the user's to access the sections menu on the right and click access codes. The column called access code indicates the name of the access code and column called Debited On indicates the date and time the code was used. Managers must use access codes to register a user to products. Please visit the Register Users to Products section of this manual for instructions.



7.2 Using Access Codes for Auto-Enrolment

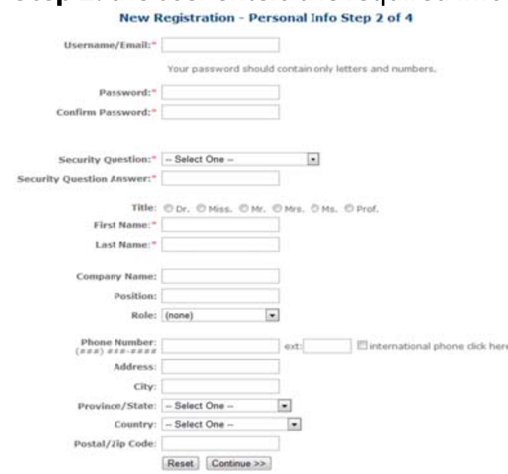
How access codes are used and work for your users is dependent upon the configuration of your system. One typical use for access codes is to automatically enroll users into specific products based on the user groups they belong to. The access code registers a user to user groups and the auto-enrolment then enrolls the user to all products attached to that user group. If your site uses the auto-enrolment configuration, then everyone in a user group has the exact same list of courses as each other. When de-registering a user from a user group, all of the products that are linked to that group are automatically removed from their account. Users would either enter the access code in the quick register box after logging in, or enter it via the Log In page to register for a new account as appropriate.

7.3 Using Access Codes for New User Registrations

How access codes are used and work for your users is dependent upon the configuration of your system, however one typical use for access codes is for users who do not already have an account within the LMS. Those users can enter their access code from the login screen by clicking the link: Do you have an access code? This will start a quick four step process to create a new account.

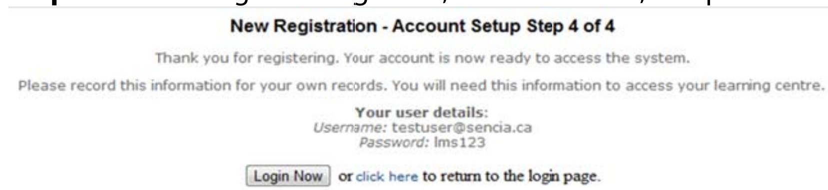
Step 1: the user enters an access code

Step 2: the user enters the required information for registration



Step 3: the user confirms or edit their entries

Step 4: the user is given a login link, their username, and password.



7.4 Using Access Codes with Current User Registrations

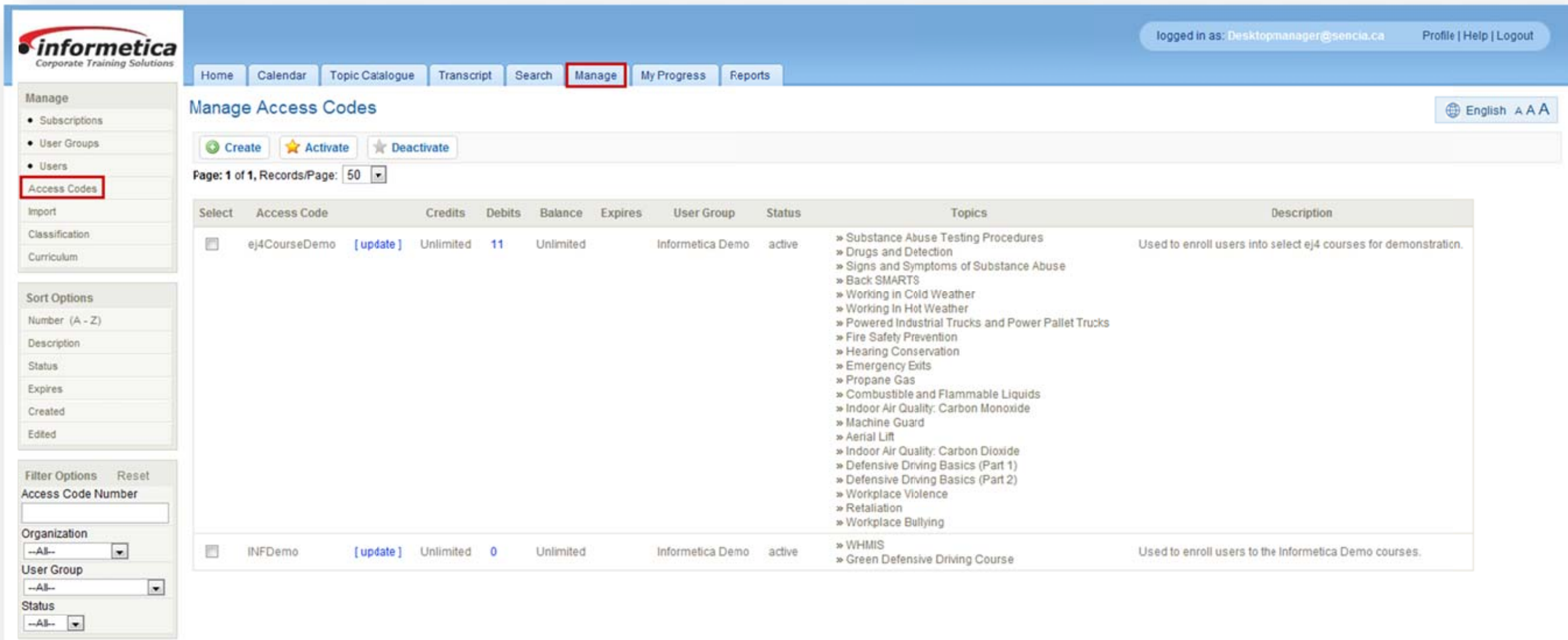
How access codes are used and work for your users is dependent upon the configuration of your system, however, one typical use for access codes is for users who already have an account within the LMS. Those users would enter their access code after they log in from the quick register information field on the left side. The quick register box will let the user know if they have already used the code, if the code is invalid or if the code is accepted. The user would then be eligible to register for any of the products the access code granted them access to from the catalogue.

7.5 The Manage Access Codes Page

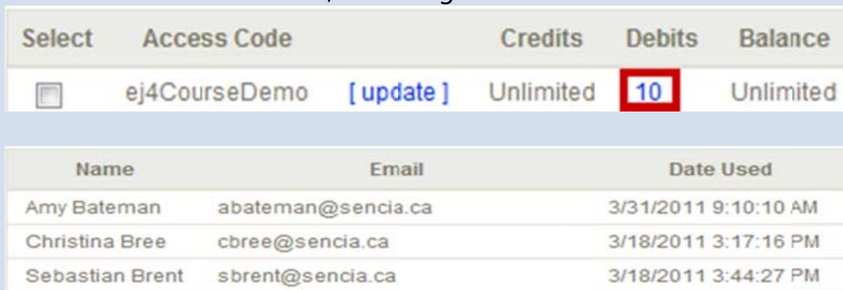
The manage access codes screen allows you to view a list of all access codes in use by your organization(s), create new access codes, view details about each access code, activate or deactivate codes and rename codes. Site managers can view every access code in the system.

7.5.1 Non-Site Managers

To access to the manage access codes screen, click the manage tab from the main navigation bar, then click the access codes link from the manage menu on the left.

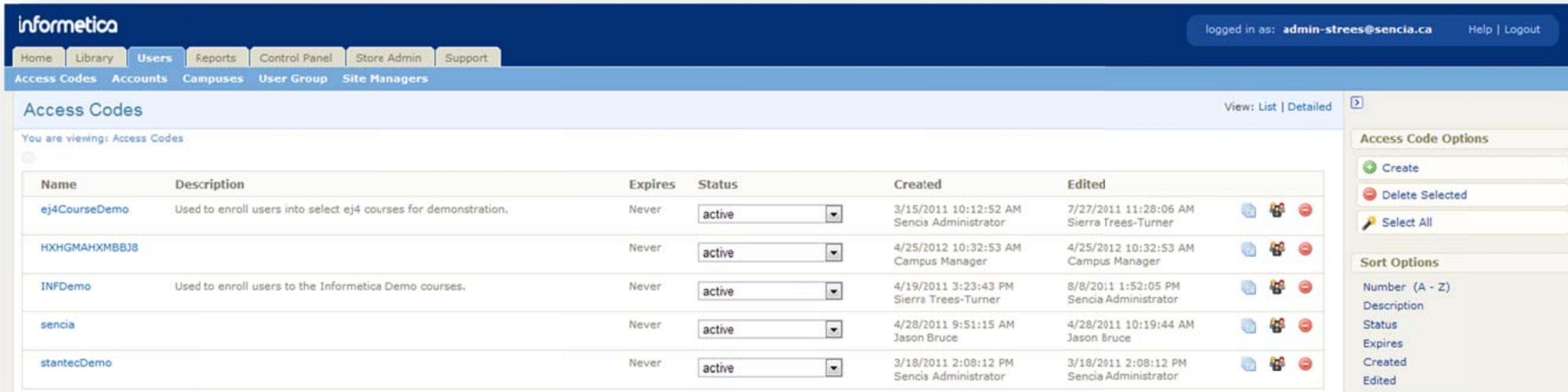


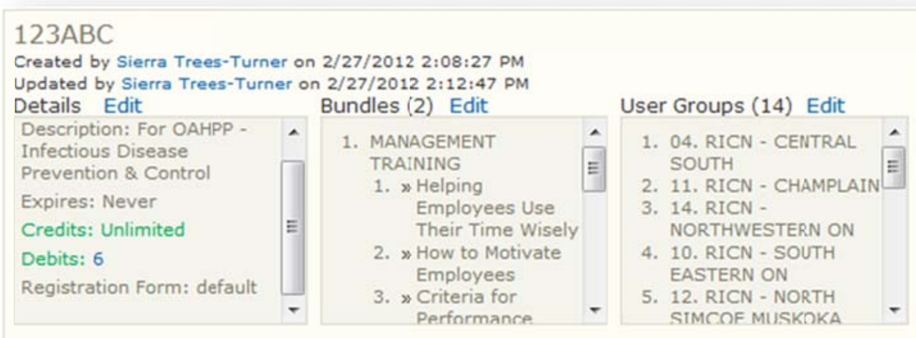
Below is a brief description of the fields:

Field	Description	Interactive
Select	Use the check box in front of any code name to actively select specific access codes. Selection is used to activate or deactivate an access code.	Yes
Access Code	The name of the access code. Use the update link [update] to change the name of the access code.	Yes
Credits	The total number of times the access code can be used.	No
Debits	The number of times the access code has been used. You can click the entry to view a list of which accounts have used the access code, including their email address and the date the code was used. 	No
Balance	The number of uses remaining for the access code.	No
Expires	If applicable, this will indicate the date that the access code becomes unavailable.	Yes
User Group	Lists the user group the access code belongs to.	No
Status	Indicates whether the access code is active or inactive.	No
Topics/Products	Lists the products that the access code will register users to.	No
Descripton	Shows a description of the access code if one was entered.	No

7.5.2 Site Managers

Site managers can view every access code in the system by selecting users from the main navigation panel and then clicking access codes. Click detailed view for access to more information such as debits, credits, and to edit the codes.





Below is a brief description of the fields:

Field	Description	Interactive
Name	The name of the access code. Use the edit link from detailed view to change the name of the access code.	Yes
Descripton	Shows a description of the access code if one was entered.	No
Expires	If applicable, this will indicate the date that the access code becomes unavailable.	Yes
Status	Indicates whether the access code is active or inactive.	No
Created/Edited	Logs the date and time of the creation and last edit of the access code	No
Bundles	Lists the bundles that the access code belongs to.	Yes
User Groups	Lists the user groups that the access code belongs to.	No
Delete	Site managers can delete an access code.	
Credits	The total number of times the access code can be used. Description: Expires: Never Credits: 5 Debits: 0 Registration Form: Default	No
Debits	The number of times the access code has been used. You can click the entry to view a list of which accounts have used the access code, including their email address and the date the code was used. Description: Expires: Never Credits: 5 Debits: 0 Registration Form: Default	No
Balance	The number of uses remaining for the access code.	No
Products	Lists the products that the access code will register users to.	No

7.5.3 Sort Access Codes

Access codes are sorted alphanumerically by default. To change the order in which the list of access codes is displayed, click any of the options under the sort options menu on the right hand side:

Number – sorts alphabetically and numerically by name (ascending or descending).

Description – sorts by description alphabetically (ascending or descending).

Status – sorts by the active or inactive status of the codes (ascending or descending).

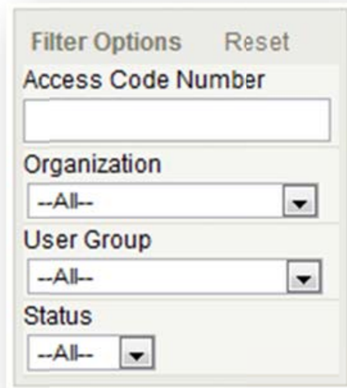
Expiration Date – sorts from oldest to newest expiry or from newest to oldest expiry.

Created Date – sorts from oldest to newest creation date or from newest to oldest creation date.

Edited Date – sorts from oldest to newest edit date or from newest to oldest edit date.

7.5.4 Filter Access Codes

To show only specific access codes, use the filter menu on the right. This is particulary useful if you have many access codes.



Reset – Choose reset to remove any filter options.

Access Code Number –Enter a word or two that is contained in the name of the access code.

Organization – Use the drop down menu to see only access codes assigned to a specific organization.

User Group – Use the drop down menu to see only access codes assigned to a specific user group.

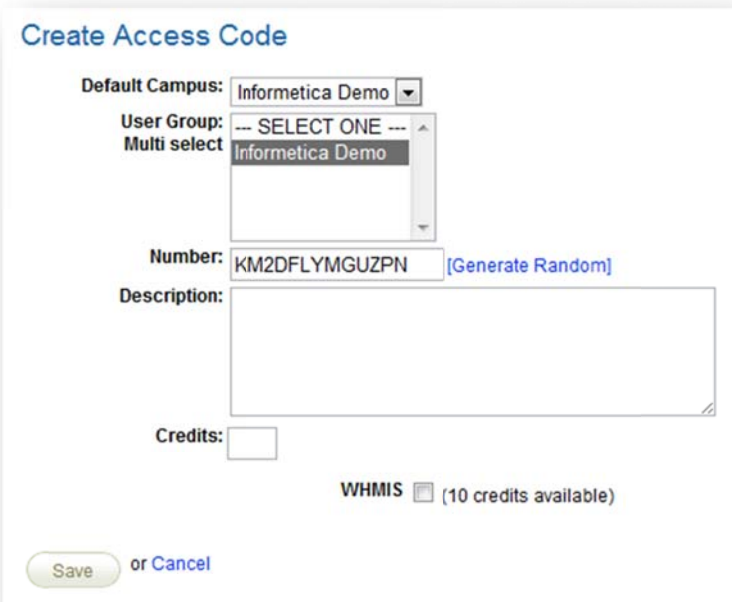
Status – Use the drop down menu to view only access codes that are active or inactive.

7.6 Create an Access Code

7.6.1 Create an Access Code: Campus Admins and Campus Managers

Informetica offers two access code creation configurations for non-site managers. Your system will only have one configuration. Instructions for both configurations are shown below. Note that non-site managers can only create active access codes with an unlimited use and once an access code is created, only the name can be changed.

Configuration 1: Create an Access Code without Subscriptions



This configuration gives non-site managers the authority to assign products via access codes without needing to purchase subscriptions. To create a new access code, click the create button from the manage access codes page.

Default Organization – Use the drop down menu to select organizations to assign the access code to.

User Group – Use the drop down menu to select the user groups to assign the access code to.

Code Number – Enter an access code name/number or click generate random to create one for you.

Description – Enter an optional brief description of the access code. This description is for internal use only.

Expires – Enter an expiry date or select never.

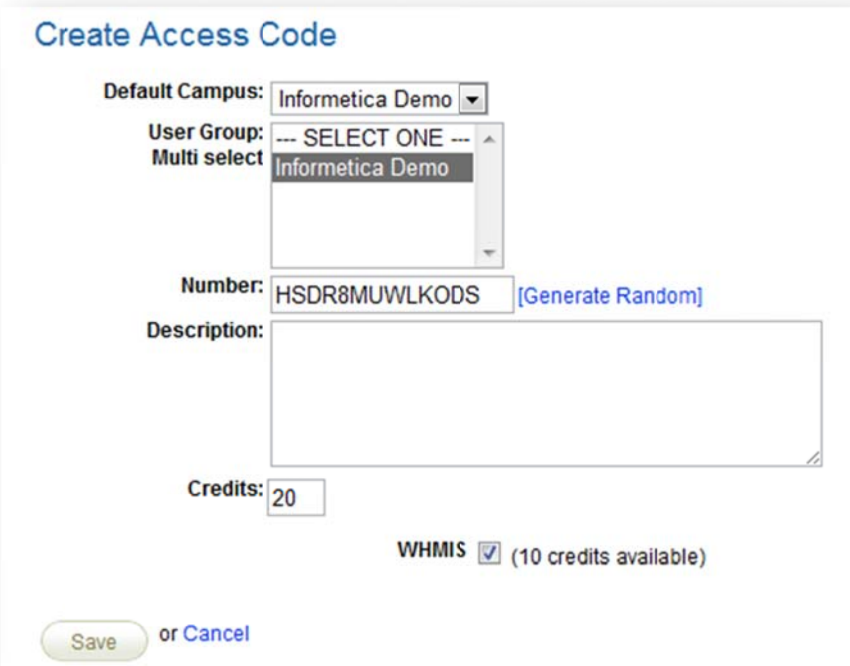
Product Selection – 

Use the check boxes to select products to assign to this access code. The products that are available here are populated by what is available to your organization.

Save or Cancel – Click save to finish creating your access code or click cancel to start over.

Configuration 2: Create an Access Code with Subscriptions

This configuration gives non-site managers the ability to use their subscriptions to create access codes. To create a new access code, click the create button from the manage access codes page. You will not be able to create an access code if you have no subscriptions available. See the subscriptions part of this chapter for more information.



Default Organization – Use the drop down menu to select organizations to assign the access code to.

User Group – Use the drop down menu to select the user groups to assign the access code to.

Code Number – Enter an access code name/number or click generate random to create one for you.

Description – Enter an optional brief description of the access code. This description is for internal use only.

Credits – Enter a number from your available subscription credits to assign uses for this access code. Note the number of subscription credits you have available as the system will not let you use more than what is available.

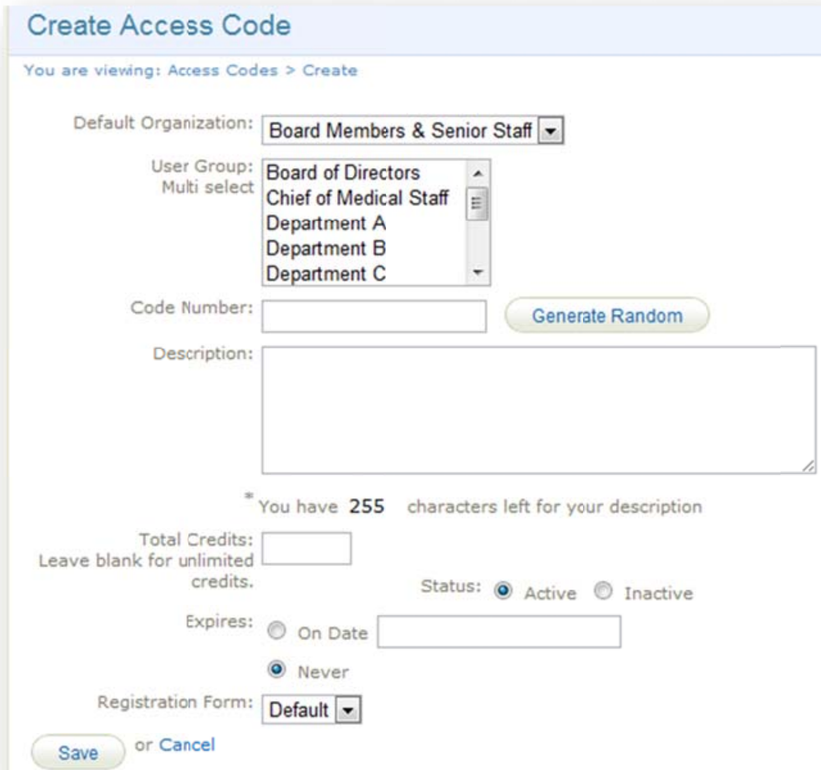
Product Selection – 

Use the check boxes to select which products to assign to this access code. The products that are available here are populated by what is available on your organization's storefront.

The system will use the number of credits you enter for each of the products you selected. For example, if you enter 20 credits and select two products, then 20 credits will be debited from the credits available for both products. The access code can be used 20 times and will register users to both products. Once the credits are used regardless if the users ever login with it, the credits are spent.

7.6.2 Create an Access Code: Site Managers

Click the create link from the menu on the right. Alternatively, you can create a new access code from the home page under quick create by clicking access code. Either method will bring you to the create access code page.



Below is a brief description of the fields:

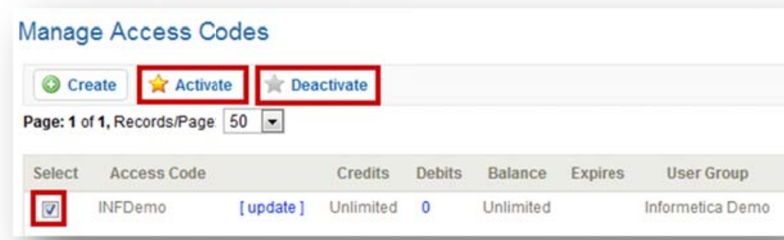
Field	Description	Input
Default Organization	Use the drop down menu to select organizations to assign the access code to.	Required
User Group	Use the drop down menu to select user groups to assign the access code to.	Required
Code Number	Enter an access code name/number or click generate random to create one for you.	Required
Description	Enter an optional brief description of the access code. This description is for internal use only.	Optional
Total Credits	Enter a number of total credits to limit the number of times the access code can be used or leave this field blank for unlimited use of the code.	Optional
Status	Choose the status (active or inactive). Inactive access codes cannot be used for registration until set to active.	Required
Expires	Enter an expiry date or leave the field blank for access codes that do not expire.	Optional
Registration Form	This option should only be selected if the access code will be used to create user accounts. If your site uses several different registration forms (perhaps for different organizations) then you can select which one you want to present the user when they are creating their account using this access code.	Optional
Save	Save to complete your access code creation.	Required

7.7 Activate/Deactivate/Delete an Access Code

From the manage access codes screen, you can activate or deactivate access codes.

7.7.1 Activate/Deactivate for Non-Site Managers

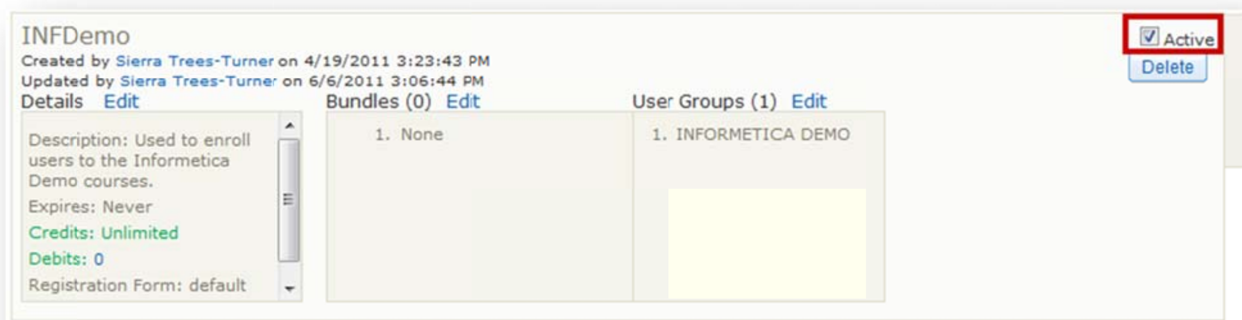
To activate access codes listed with a status of Inactive, select the access codes by clicking the check boxes in front of their names. Click the activate button near the top of the manage access codes page to make the code active. Only active access codes can be used by users accessing the system.



To deactivate an access code listed with a status of active, select the access codes by clicking the check boxes in front of their names. Click the Deactivate button near the top of the manage access codes page to make the code inactive. An inactive code cannot be used by users accessing the system.

7.7.2 Activate/Deactivate for Site Managers

Change the status of an access code, by checking or unchecking the active box in the top right of the access code information box.



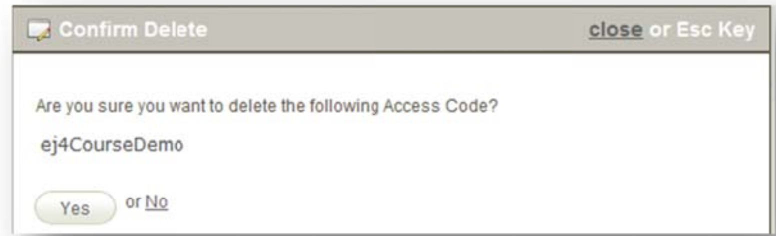
A checkmark means the access code is active.

An empty checkbox means the access code is inactive.

7.7.3 Delete an Access Code

This option is available only to site managers.

To permanently delete an access code, select the access code's information box and then choose **Delete Selected** from the Access Code Options menu or **Delete** from in the access code box itself. Click yes on the delete access code prompt.



7.8 Edit an Access Code

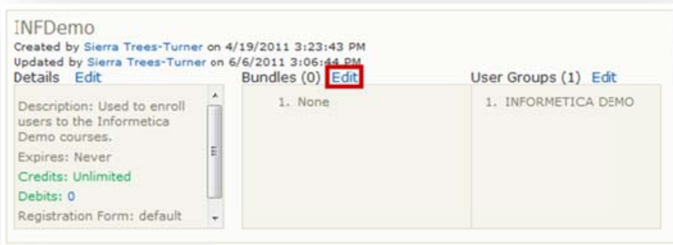
This option is available only to site managers.

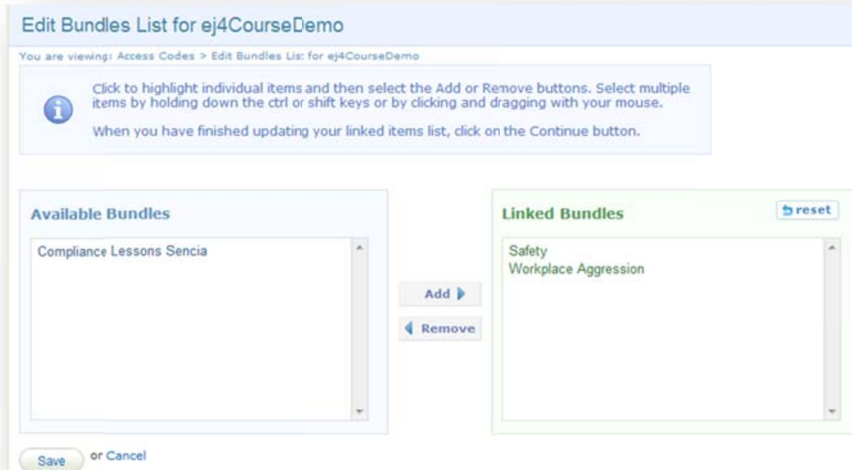
Click on the edit link next to the details menu in the access code information box. The edit access code details screen will appear where you can make modifications and then click the save button.

7.9 Using Bundles to Assign Products

This option is available only to site managers.

Bundles may be assigned to an access code for easy enrolment of one or many users. Assigning products to access codes must be done by using bundles. If you have only one product that you need to assign to an access code, you must put that one product into a bundle by itself. To learn more about bundling products together, visit the bundles chapter of this manual. Click on the edit link next to bundles menu in the access code information box.





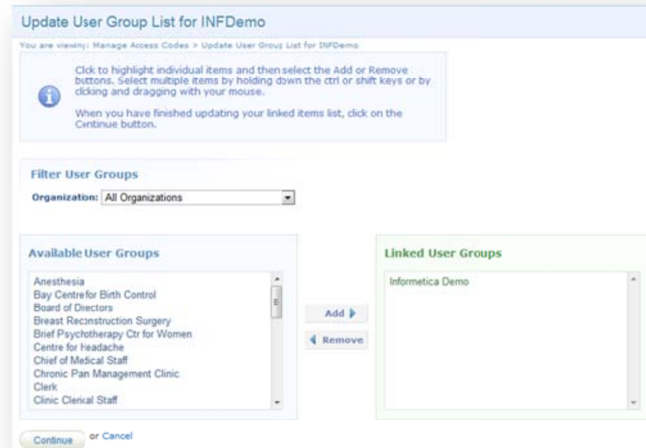
The access code bundles screen allows you to add or modify bundles assigned to the access code. The bundles that are available are based on user groups, so make sure that you have assigned the correct user groups to the access code for the bundles you wish to have access to.

Note that if your site uses the auto enrolment configuration, then you can skip this step. With auto enrolment, everyone in a user group has the exact same list of courses as each other. For this reason, bundles would not be attached to access codes. The access code registers a user to user groups and the auto-enrolment then enrolls that user to all courses attached to that user group.

7.10 Edit or Add Users Groups to Access Codes

This option is available only to site managers.

Click on the edit link next to user groups menu in the access code information box. The update user group list will appear where you can add or remove the user groups associated with the access code and then click continue.



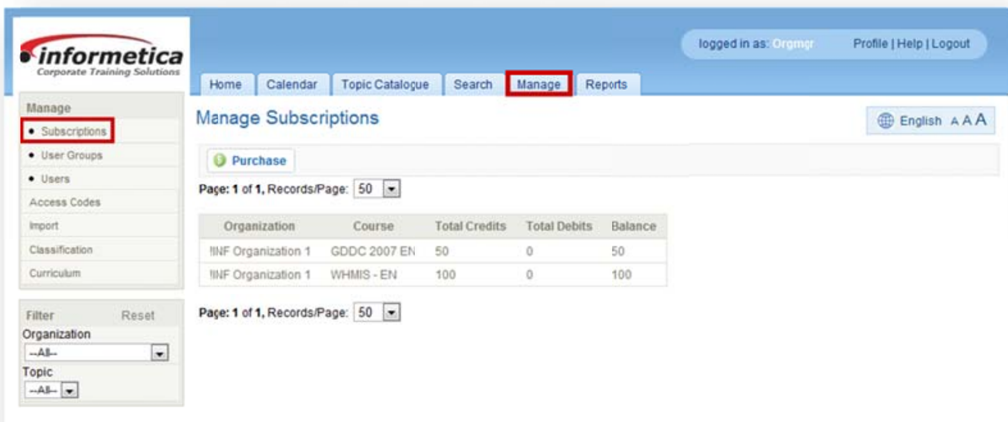
8. Subscriptions

A subscription is the advance purchase of a specific quantity of products that can then be administered to users within user groups.

Topics Covered in this Chapter

8.1 What is a Subscription?

Subscriptions are available to clients with e-Commerce and are automatically created by managers when they order a specific number of products for their own use. Subscriptions are generally used for bulk purchases.



8.2 The Manage Subscriptions Page

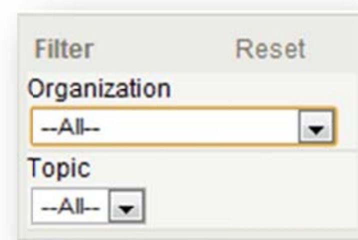
To access the manage subscriptions screen, click the manage tab from the main navigation bar, then click the subscriptions link from the manage menu on the left. This page shows a list of subscriptions for your organizations. You can use the filter option to the left hand side to see subscriptions for a single organization if you belong to more than one or to view subscriptions by product.

Below is a brief description of the fields:

Field	Description
Organization	The name of the organization this subscription is associated with.
Course	The name of the product the subscription was generated for.
Total Credits	This represents the total number of times the access code can be used.
Total Debits	The total number of times the access code has been used.
Balance	The number of uses remaining for the access code.

8.3 Sort and Filter Subscriptions

By default, subscriptions are sorted alphabetically by organization and then by product. To change the order in which the list of subscriptions is displayed you can filter by specific organizations or products (shown as "Topics" in the example).

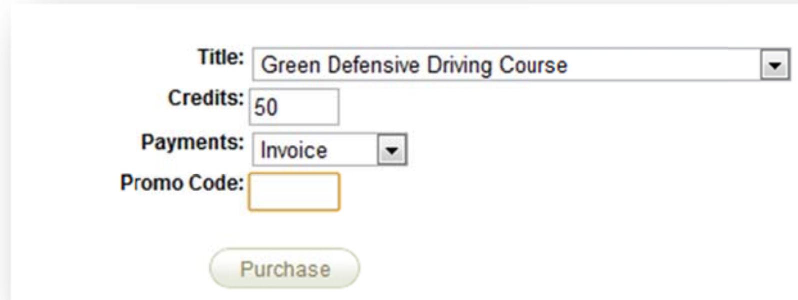


Below is a brief description of the fields:

Filter Option	Description
Reset	Choose the reset link at the top of the filter options menu to remove any filters.
Organization	Use the dropdown menu to view only Subscriptions for a specific organization.
Product (Topic)	Use the dropdown menu to view only Subscriptions associated with a specific product.

8.4 Create a Subscription

From the manage subscriptions page, click the purchase button to create a new subscription.



Below is a brief description of the fields:

Field	Description
Title	Use the drop down menu to select the product the subscription will be generated for.
Credits	The total number credits that were purchased for the subscription. This represents the number of times the access code can be used.
Payments	Use the drop down menu to select your payment type.
Promo Code	Enter a promotion code for a bulk discount. Promo codes are generally supplied by a site manager if available.
Purchase	Click the purchase button to start the transaction. A confirmation page will appear so you can agree to the purchase price before completing the transaction.

9. Importing Data

Informetica's built-in Excel import utility allows you to upload information in bulk. It can be used to create new users or update user information en masse, assign users to completed certifications and mass enroll users to training.

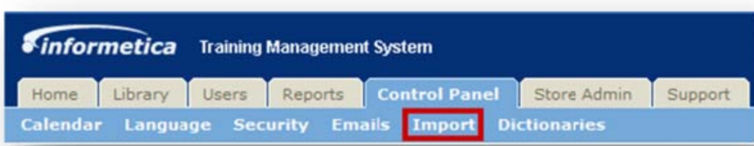
Topics Covered in this Chapter:

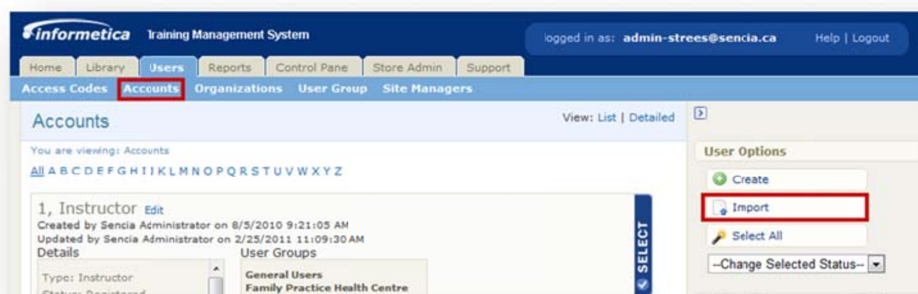
If your site has the Import configuration, then site managers, campus admins, and organization managers you can use an Excel spreadsheet to import information in bulk. Use the import tool to create or update user information en masse, assign users to completed certifications and mass enroll users to products. You can navigate around the steps or start over at any time before the final import.

9.1 Accessing the Import Tool as a Site Manager

There are two ways to access the import tool as a site manager:

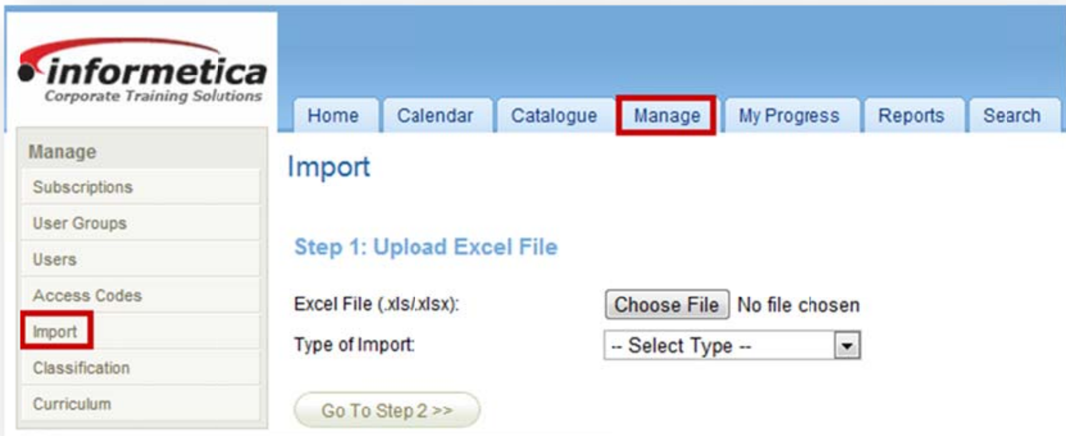
1. From the control panel tab, click the Import link. This method will let you select the type of import you wish to upload
2. From the users tab, click the accounts link. There is a menu to the right called user options. Click the Import link under this menu. Navigating using this method will automatically select users as the type of import.





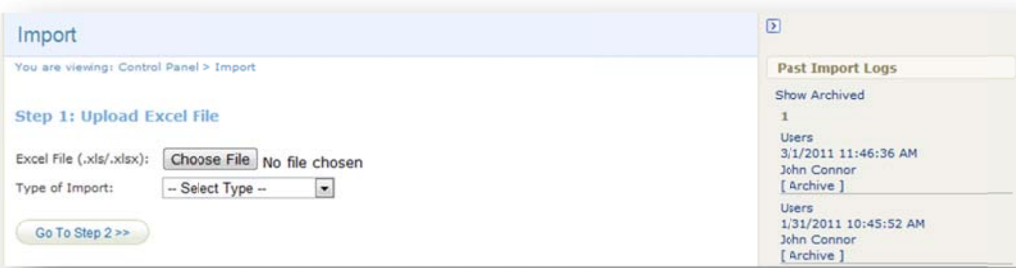
9.2 Accessing the Import Tool as a Campus Admin or Campus Manager

Click the manage tab from the main navigation bar and then click import from the manage menu.

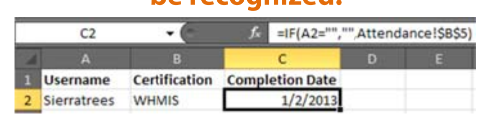


9.3 Import an Excel File

From the Control Panel tab, click the import link. This will open the Import tool that will let you select the type of import you wish to upload. If you are importing user names, you can base the import either on username or first/last name and email. It is recommended that you import in batches of 500 records or less at a time to help avoid connection timeout issues.



The import tool prefers importing .xls files, so save your file in an older format if necessary.
Make sure that cells do not contain any formulas, but only the data value itself. Data in formulas will not be recognized.



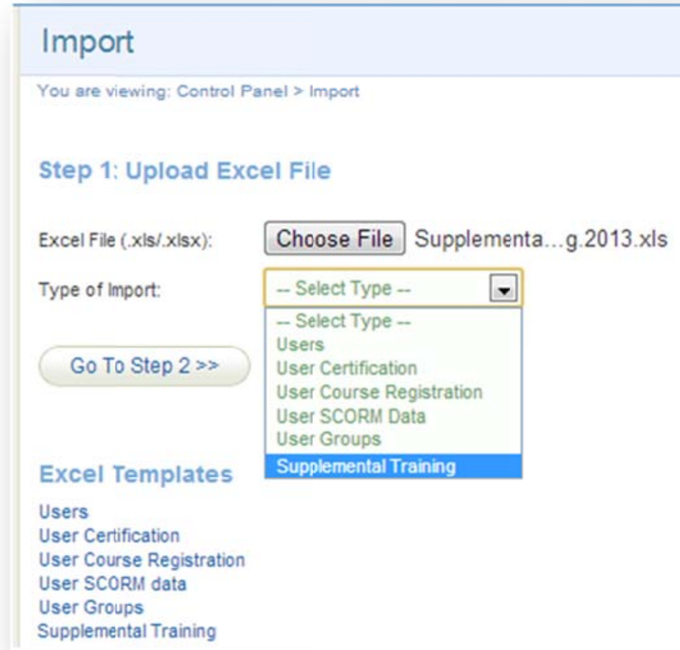
Below is a brief description of the fields:

Field	Description	Input
Choose File/Browse	Depending upon the browser you are using, the option showing here may be browse or choose file. Select the Excel file you wish to upload from your computer.	Required
Type of Import	Use the dropdown menu to choose one of the types of import: • Users: users are inserted or updated. • User Certification: users are associated with completed certifications. • User Product Registration: users are registered to products. • User SCORM data: user accounts are updated with SCORM completion and grades data. • User Groups: create or update existing user groups, assign them to organizations, and add a description of each. • Supplemental Training: create supplemental training records to attach to specific user profiles.	Required
Excel Templates	Select the appropriate link to download an Excel file showing the required format for your imported content. Note that only the fields in bold on these files are required information. The remaining fields are optional.	Optional
Past Import Logs	This interactive import list will show or hide archived logs. Select anywhere on one of the logs to see a list of the users and criteria imported during that session, as well as if they imported successfully or not. • Users/certification/product registration: This line indicates what was imported (users, user certification or product registration) • Date: Shows the day and time of the import • Name: This is the name of the manager that did the import	Optional
[Archive]	Click archive to hide the import from the list	Optional

9.3.1 Step One: Upload Excel File

You can select the link for the appropriate Excel template from the list at the bottom and use that file to ensure that the file you are importing has the columns set up to match the required field for import. Use the templates to create your import file so your Excel columns are set up to match the required fields for import to Informetica.

Click the choose file/browse button to select the file you want to upload and then use the dropdown menu to choose one of the types of imports. Click the "Go To Step 2" button to upload the Excel file and continue the import.



9.3.2 Step Two: Select Data Table

Use the drop down menu to select the information on the Excel file that you want to import. If your spreadsheet has more than one sheet of data, then you must select the correct one. By default, an unnamed Excel sheet name is Sheet1$. Excel can have any number of sheets or defined names that correspond to a data table when importing.

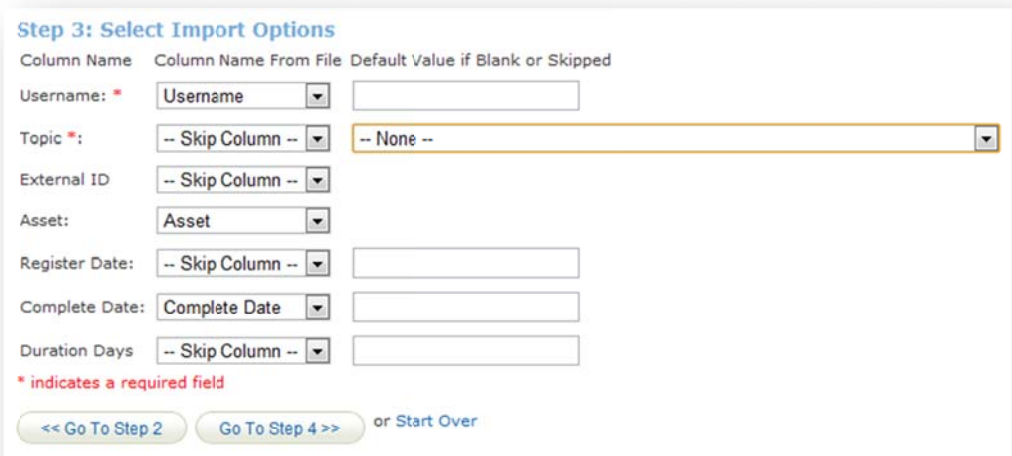
The types of imports available vary by system, so your options may differ from those pictured. Contact your system administrator to have an option activated for your system.

9.3.3 Step Three: Select Import Options

Step three is where you match the information on the Excel file with the appropriate information that you want to import into the LCMS.

A Word of Caution: *Match your columns and enter default values with care. If you match the wrong columns or change a default value, you can potentially affect information that you did not intend to. Additionally, a blank default value will overwrite or even remove current information in the system if the column name is skipped or empty on the Excel sheet.*

For example, let's say you want to update 500 users to a new user group. You have correctly matched the user group columns, but somehow accidentally used the wrong match for username. You could potentially create 500 brand new users with duplicate first and last names. You will get to preview the results in step four and can come back to step three if you noticed that users will be created instead of updated.

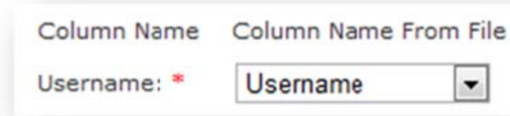


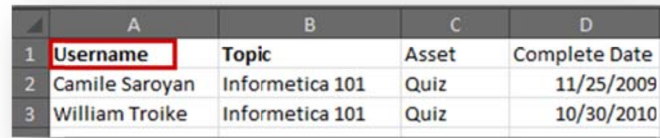
You can use skip, dropdown, and input fields in combination with each other.

Matching Columns

When the names are already an exact match, then they are automatically paired. In the example, “Username” on the left represents the LCMS username. The “Username” on the right is the name of the column on the imported Excel file. The import tool found an exact match and paired them together automatically.

Whichever column you pick will import into the LCMS or overwrite existing information, so be careful with your selection.

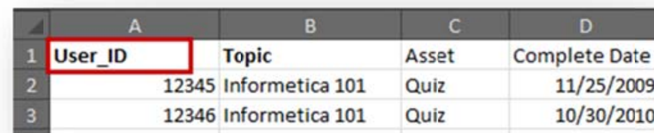




	A	B	C	D
1	Username	Topic	Asset	Complete Date
2	Camile Saroyan	Informetica 101	Quiz	11/25/2009
3	William Troike	Informetica 101	Quiz	10/30/2010

Non-Matching Columns

If the column names in the Excel file differ from what the LCMS names are, you can still match them by selecting the appropriate Excel column name. Use the drop down menu to select another column from the Excel file. In the example, the Excel file does not have a column called username, but selecting USER_ID will import that information into the username field in the LCMS.



	A	B	C	D
1	User_ID	Topic	Asset	Complete Date
2	12345	Informetica 101	Quiz	11/25/2009
3	12346	Informetica 101	Quiz	10/30/2010

Required Fields

Certain fields, marked by a red asterisk *, are required. If no value gets associated with a required field, the import will continue without importing that record. Ensure that you have either selected the appropriate matching information from the Excel file or that you have opted to skip the information if it is already available in the LCMS.

Skipping Columns

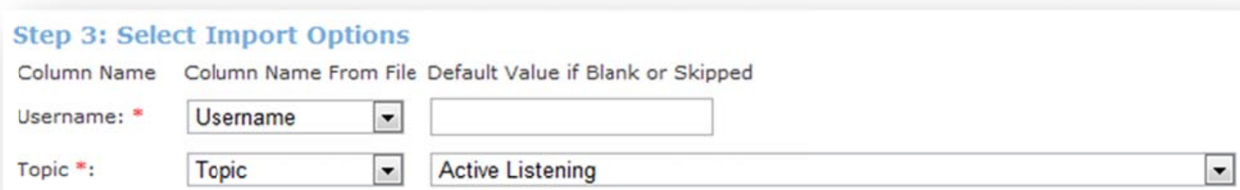
If the LCMS data does not have an exact match or if the information is blank on the Excel import, then you will see "--Skip Column--". You can select a new match from the drop down menu or keep the skip column option. Skipped column data will keep the data that is already in the LCMS without updating it with what is on the Excel file unless you enter a new default value to the "Default Value if Blank or Skipped" field (see below).

Default Values

If the data is blank in the Excel file or if the column is skipped, then you can assign a default value to it. Some fields will have a drop down menu for you to choose from and some let you type in a value manually. The value you enter for that field will update for all of the records that you import.

In the example below, every person being imported into the LCMS will be given a registration date of October 27th, 2011.

Defaults values may also be assigned to some types of specific imported data, such as product registrations. In the example below, all users imported will be registered to the Topic that is listed in the Excel column, however, if that column is blank, they will be registered to the topic titled Active Listening.

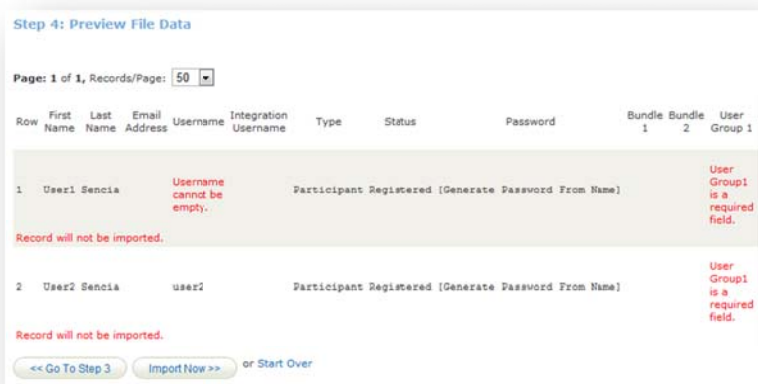


9.3.4 Step Four: Preview File Data.

Step Four: Preview File Data. In this step, up to the first 50 records of what will be imported are shown. To show all records, the Show All link can be clicked.

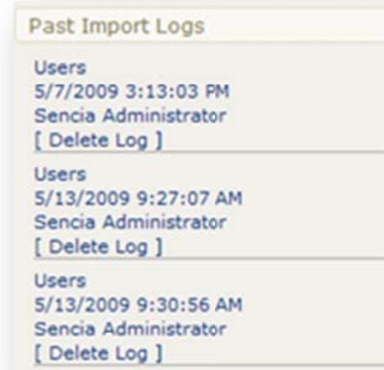
For all types of imports, a match is attempted on First Name, Last Name and Email Address. If a match is found, the user record is updated. If a match is not found and the type of import is “User” or “User Trial Registration”, the new user is inserted. If a match is not found and the type of import is “User Course Registration” or “User Certification”, the record is not imported at all. If a new user is inserted and the username or password is blank, these fields are automatically created from the user’s first name and last name. For example, “Bill Herst” will have a username of “bherst” or possibly “bherstX” where X is a number making the username unique.

In this preview step, records that will not be imported are displayed with red warning messages, indicating the reason, whether it is the wrong data type, too long, missing or otherwise.

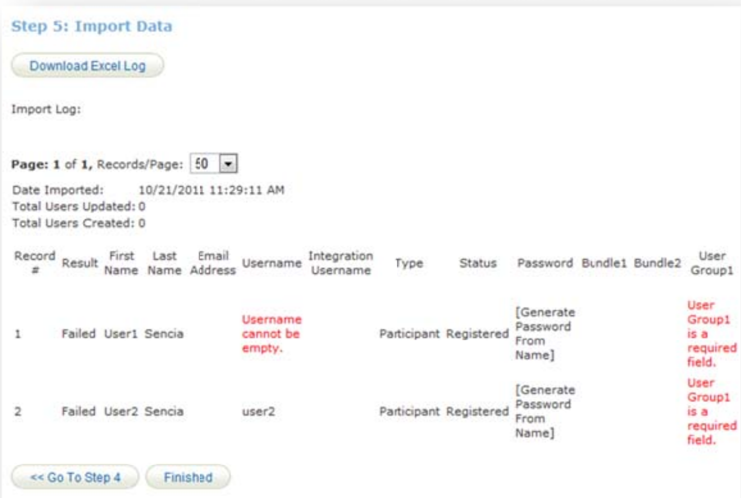


9.3.5 Step Five: Import Data.

Step Five: Import Data. Once the import now button is clicked the import will run, then display a full import log. The result can be updated, inserted or failed. If failed, the reason is given in red. The import log is saved and can be downloaded right away by clicking the download Excel log button, or at any time in the future from the first step screen:



Lastly, if new users were inserted, a button will show, which when clicked will send a registration email to each new user.

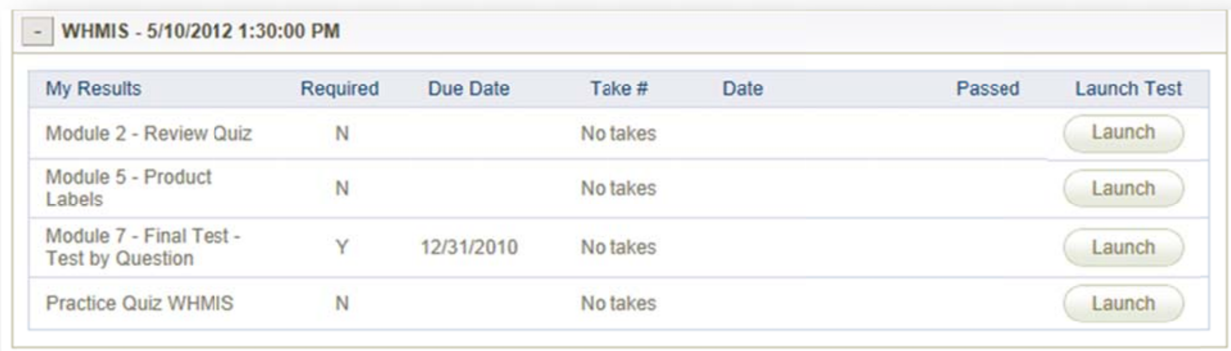


10. Curriculum

Topics Covered in this Chapter

10.1 Navigate to Curricula
10.2 Sort and Filter Curricula
10.3 Create Curriculum
10.4 Edit Curriculum
10.5 Delete Curriculum
10.6 Exemptions

Informetica's curriculum tool allows site managers, campus admins, and campus managers to identify required testing materials for participants. Curriculum allows participants see which tests are required and filter to see only the required tests in their transcripts. Curriculum is automatically applied to a user based on the one to one relationship of a default organization and a default classification. No administration path is needed to assign curriculum to users. If you have set the user up with the proper default classification and a default campus, then curriculum will be automatically assigned to the user. You can opt to enable automatic email alerts to remind participants about approaching curriculum due dates.



- WHMIS - 5/10/2012 1:30:00 PM

My Results	Required	Due Date	Take #	Date	Passed	Launch Test
Module 2 - Review Quiz	N		No takes			Launch
Module 5 - Product Labels	N		No takes			Launch
Module 7 - Final Test - Test by Question	Y	12/31/2010	No takes			Launch
Practice Quiz WHMIS	N		No takes			Launch

A participant may have only one curriculum applied, since curriculum is based on the default campus and default classification of the participant.

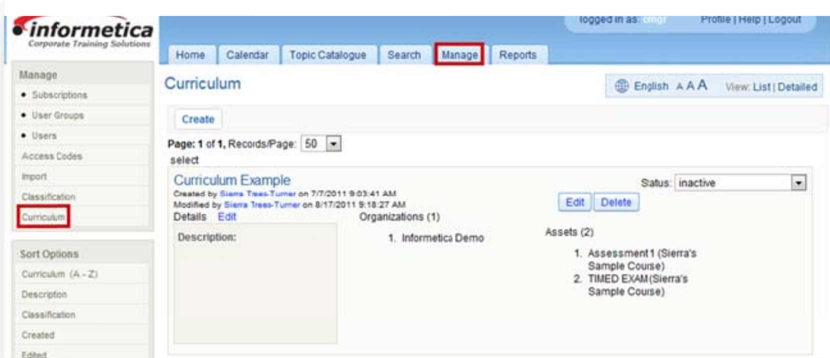
What is curriculum good for?

- Identifies different learning paths for participants
- Show participants which tests they are required to do as part of a curriculum, learning path, or goal
- Allows for differentiation between required vs optional testing
- Creates a set of due dates for selected tests and sends out reminder email alerts before the due dates

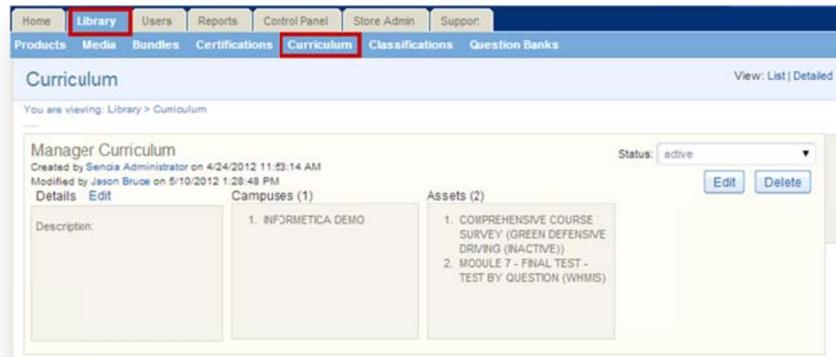
10.1 Navigate to Curricula

Campus Admins/Managers manage curricula by selecting the **Manage** tab, and then selecting **Curriculum** from the manage menu. Site managers manage curricula within the **Library** tab. If your site is not set up for curriculum, then you will not see the **Curriculum** sub menu.

Campus Admin/Manager View



Site Manager View



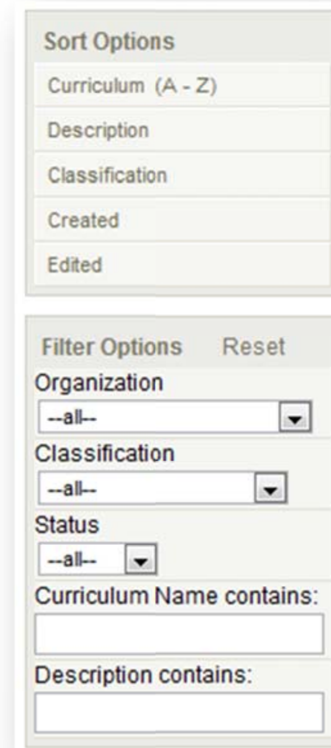
Below is a brief description of the fields

Field	Description	Interactive
Created By	Shows the username of who created the curriculum and the date it was created.	No
Modified By	Shows the username of who last modified the curriculum and the date it was modified.	No
Status	Indicates whether curriculum is active or inactive. The status can also be changed from this drop down menu.	Yes
Details	You can edit the name and description of the curriculum by clicking the Details Edit link.	Yes
Description	Shows the description text for the curriculum	No
Organizations	Indicates the number of organizations assigned to this curriculum	Yes
Assets	Indicates the number of assets assigned to this curriculum and shows a list of the asset names.	Yes
Edit	Allows you to make changes to the curriculum set up.	Yes
Delete	Permanently deletes the curriculum. You will be asked to confirm this choice.	Yes

10.2 Sort and Filter Curricula

Sort Options

To change the order in which curricula are displayed, use the sort options menu: alphabetically by organization they are assigned to (ascending or descending), by description, by created date (from oldest to newest or from newest to oldest) or by modified date (from oldest to newest or from newest to oldest).



Filter Options

To show only specific curricula, use the filter menu on the left to help you find specific curricula by typing in a simple search term and then clicking **Go**. This is particulary useful if you have many curricula.

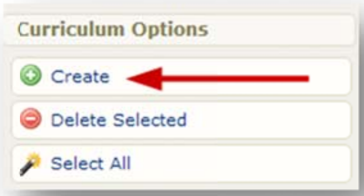
Below is a brief description of the fields

Filter Option	Description
Reset	Choose the reset link at the top of the filter options menu to remove any filters.
Organization	Use the drop down menu to see only curricula assigned to a specific organization.
Classification	Use the drop down menu to see only curricula assigned to a specific classification.
Status	Use the drop down menu to see only curricula that are active or inactive.
Curriculum Name Contains	Enter a word or two that is contained in the name of the curriculum.
Description Contains	Enter a word or two that is contained in the description of the curriculum.

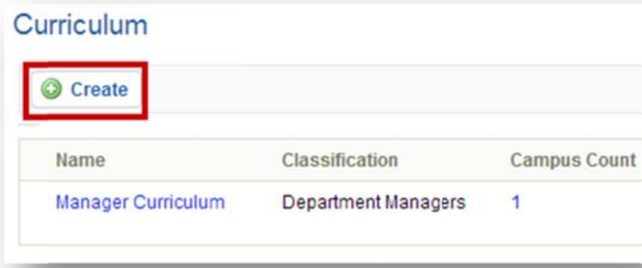
10.3 Create Curriculum

To create a new curriculum, Campus Admins and Campus Managers can press the create button under the word curriculum near the top of the page. Site managers can press the **create** link on top of the curriculum list or in the curriculum options menu to start the four step process.

Site Manager View

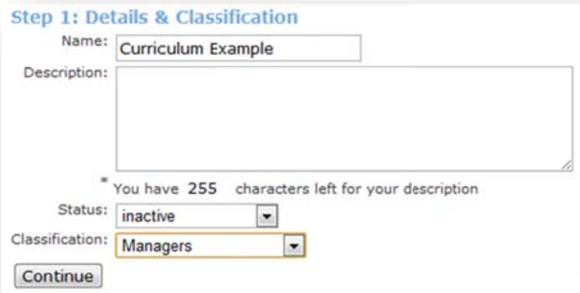


Campus Admin/Manager View



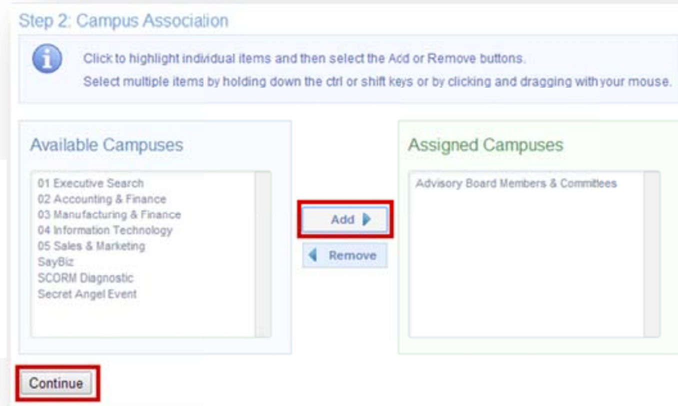
Step One

Enter the **Name** of the curriculum. Enter a **Description** if desired. Choose an Active or Inactive **Status**. Use the dropdown menu to select which **Classification** will be assigned to this curriculum. This is important because the system combines the default campus plus the classification to apply the curriculum to participants. You can only assign one classification to this curriculum.



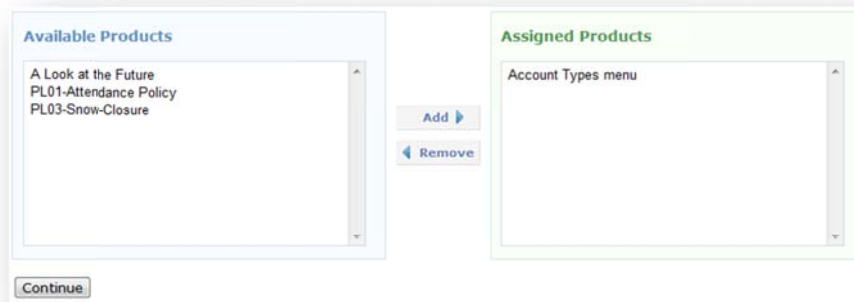
Step Two

You must assign a campus. This is important because the system combines the default campus plus the classification to apply the curriculum to participants. Select one or more campuses from the left and then select **Add** to move them to the assigned campuses box on the right. This will add the campuses to the selected curriculum when you select **Continue**.



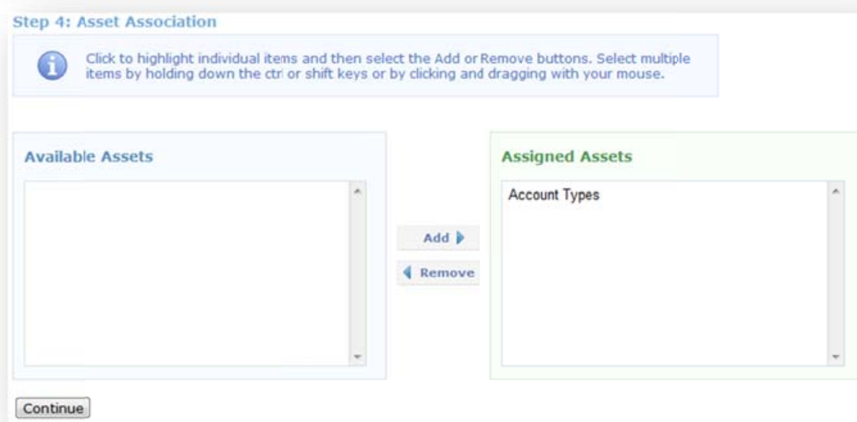
Step Three

Select the products from the available products on the left and then click the add button to move them to the assigned products box on the right. This will add the products to the selected curriculum when you click the continue button.

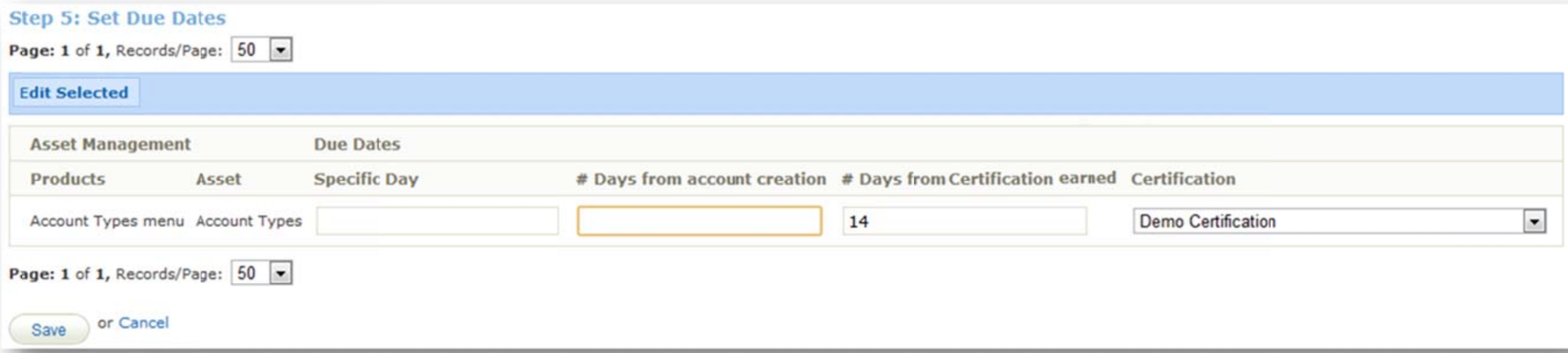


Step Four

Select the assets from the available assets on the left and then click the add button to move them to the assigned s box on the right. This will add the assets to the selected curriculum when you click the continue button.



Step Five



Fill in the details for the due date using one or more of three different due date rules. If more than one rule is used, the system will select whichever date is later. The system does not have any enforcement for users to complete curriculum by the due date, so even if it is overdue, they can still access the tests and complete them. The curriculum due date is irrelevant of any expiry date set for the test itself.

Specific Day: Enter a specific calendar date that the curriculum is due.

 # Days from Account Creation: enter a number of days from account creation. For example, a new user must complete orientation testing within 30 days of being hired.

 # Days from Certification Earned: A number of days after a specific certification was earned. This is good for offering different levels of a certification. For example, users would have to start taking the level 2 certification 30 days after completing level 1.

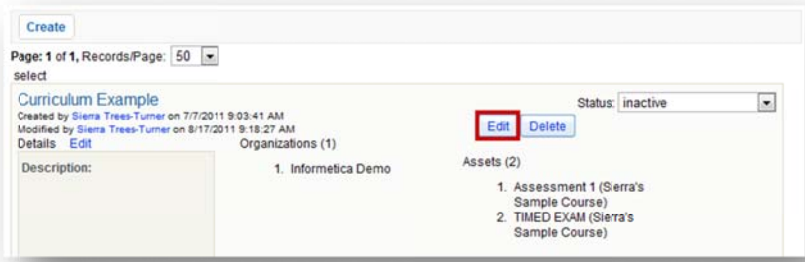
Certification: If you select option # Days from Certification Earned, then use the drop down menu to select which certification.

Save: Click save to complete the creation of the new curriculum and return to the curriculum page.

10.4 Edit Curriculum

To edit a curriculum item, select **Edit** and make changes to any of the steps in the create curriculum instructions.

Detailed View

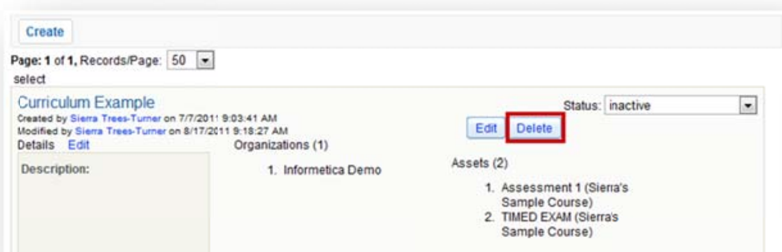


List View

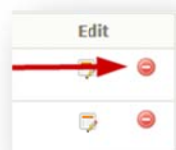
10.5 Delete Curriculum

To permanently delete a curriculum item, select **Delete**. You will be asked to confirm your choice.

Detailed View



List View



10.6 Exemptions

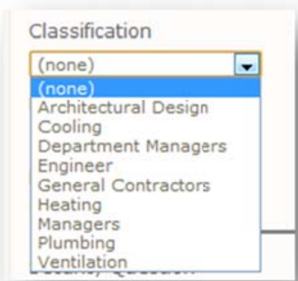
For specific participants, a Help Desk user can override a required test that is part of a curriculum. Help desk users must select a user, click to view their transcript, and then select **Grant Exemption** next to the required test. Note that this only works for tests that are part of a curriculum applied to that participant. The Help desk user can also reverse the exemption and make the test required again. Note that the Help desk user can only make a test that was originally made exempt required.

11. Classifications

Classifications are an additional way to categorize users within the Informetica system in order to determine the correct required materials for them.

Topics Covered in this Chapter

Classifications (sometimes called disciplines) are an optional secondary grouping of users and are a standard part of a user's profile. You may apply multiple classifications to any user with one designated as the default. Managers select a default classification for the user when editing a profile or creating a new account. Classifications are used with the curriculum module to determine required materials for users in specific classifications. Here is an example of the classification options in a user's profile:



Contact your Sencia administrator to:

- **Make changes to the available classifications if the classification module is not enabled**
- **Activate the classification module**
- **Enable multiple classifications**

Classifications versus User Groups

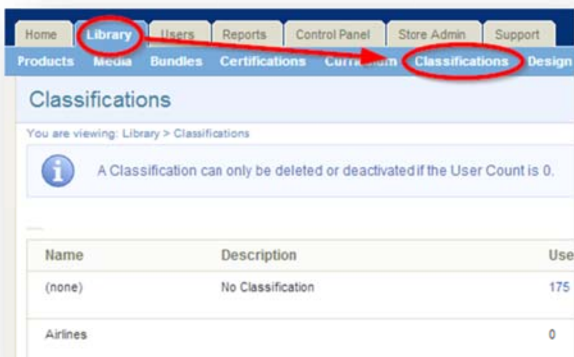
User groups are the primary method of managing users in Informetica, but users may be further defined by classification. At least one user group is required to be in use in Informetica and must be attached to at least one campus. User groups are used in many important aspects of Informetica such as product registrations, reports, and access codes. Classifications are an extra way to categorize users within the same organization or user groups. For example, a user's classification could be Senior Programmer and they may belong to the user group Division II. Only a select few features in Informetica, such as curriculum, are dependent on classifications.

11.1 Managing Classifications

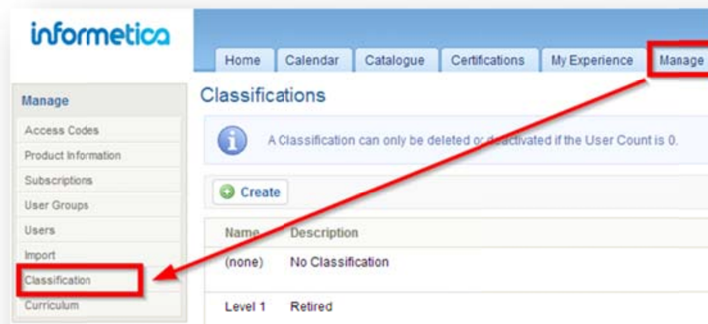
If the curriculum module is not enabled, you may still assign a classification to users, however:

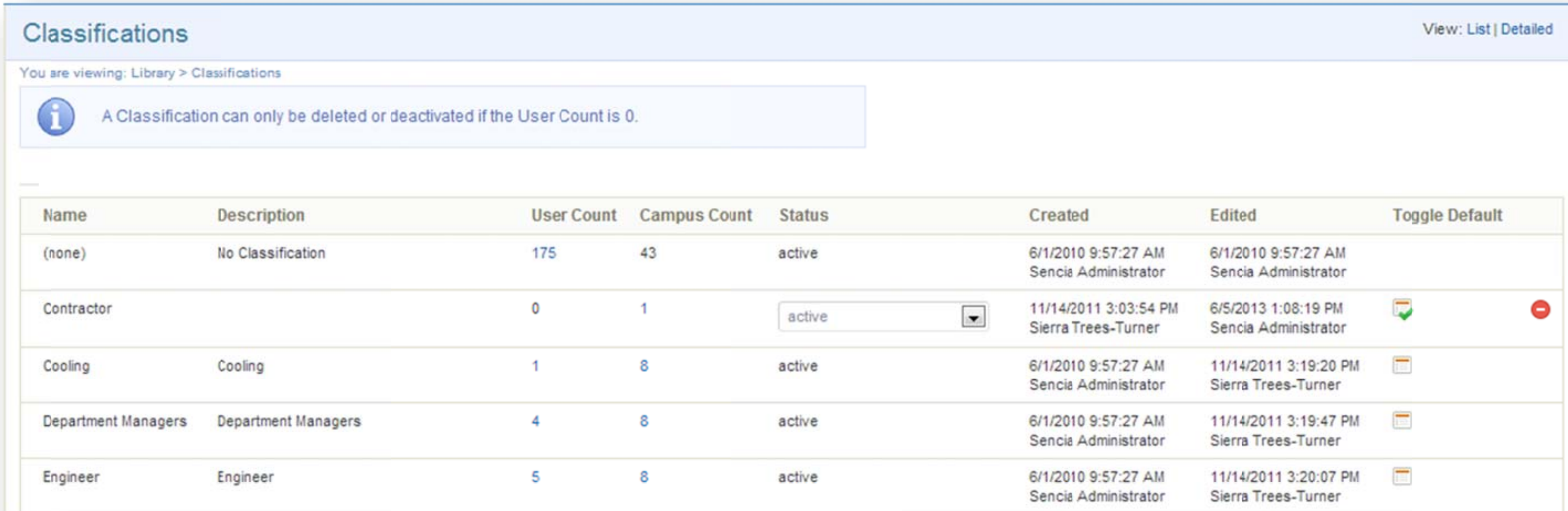
- Selections are limited to the default classifications created during initial site set up
- Assigning multiple classifications is not available
- The curriculum module is not available

Site Managers
can manage all classifications from within the Library tab by selecting the Classifications link.



Campus Admins and Campus Managers
can manage classifications belonging to their own campuses from the Manage tab by selecting Classifications link on manage menu.





Below is a brief description of the fields:

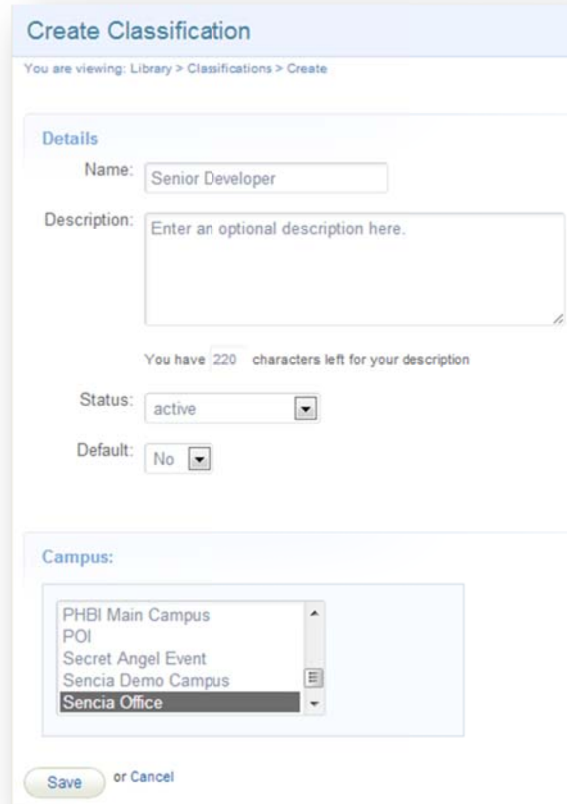
Field	Description	Interactive
Name	The name of the classification	No
Description	Shows the description text for the classification.	No
User Count Display Users	The number of users assigned to each classification. Select any user count to show a list of users with that specific classification.	Yes
Campus Count	Click any campus count to show the campuses linked to a specific classification and to add or remove campuses. Classifications that are not assigned to a campus are unavailable to users.	Yes
Status	Toggle the status from active or inactive using the drop down menu. You can only deactivate classifications with a user count of zero, even if there are assigned campuses.	Yes
Created/Edited	Date, time and username that the classification was created or last modified.	No
Toggle Default Remove/Set Default	Site Managers can set classifications as default to make them available for newly created campuses and can then be applied to users belonging to those campuses. Setting a default does not affect any existing campuses. Defaults are indicated with a green check mark.	Yes
Delete	You can only delete classifications with a user count of 0. You will be asked to confirm the delete.	Yes

11.1.1 Create Classifications

Navigate to the classifications page, select **Create** near the top of the page and then fill out the form. After creation, don't forget to assign users.

Below is a brief description of the fields:

Field	Description	Editable after Creation?
Name	Enter a name for the classification.	No
Description	Enter a description for the user group. The description is not publicly displayed.	No
Status	Select active or inactive using the drop down menu. Only active classifications can be assigned to users.	Yes
Default	Select yes to make this classification available for newly created campuses.	Yes
Campus	Assign at least one campus to make the classification available to users within the selected campuses.	Yes
Save	Save to complete your new classification.	

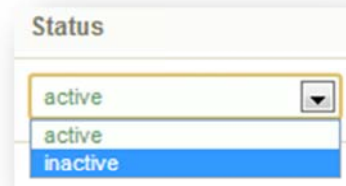


11.1.2 Add or Remove Campuses

Navigate to the classifications page and click any campus count. This will show the campuses linked to a specific classification and let you add or remove campuses. Classifications that are not assigned to a campus are unavailable to users.

11.1.3 Change Status

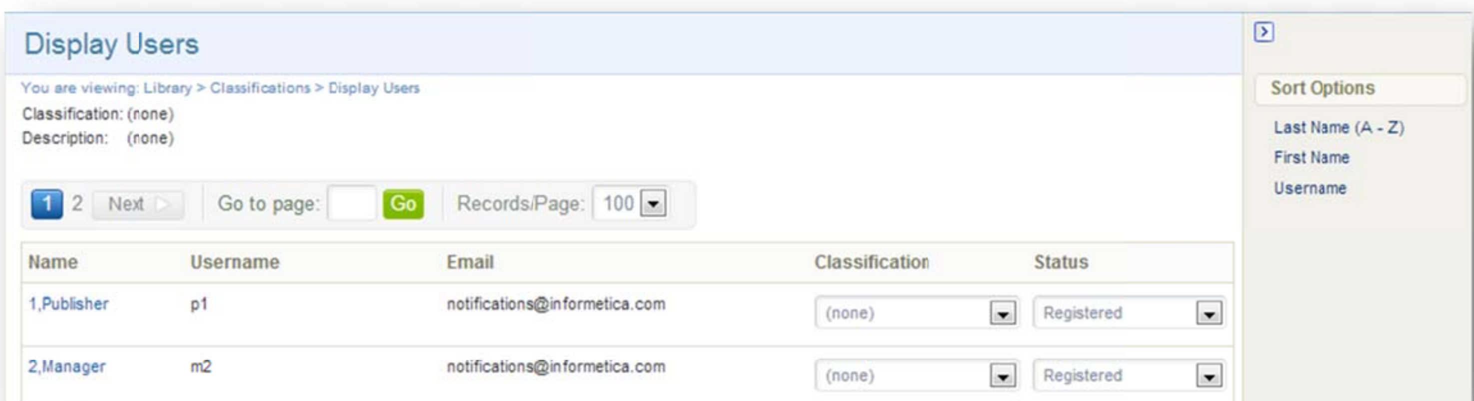
This option is available only to site managers.



Navigate to the classifications page and use the status drop down menu to toggle between active and inactive. You can only deactivate classifications with a user count of zero, even if there are assigned campuses. Only active classifications can be assigned to users.

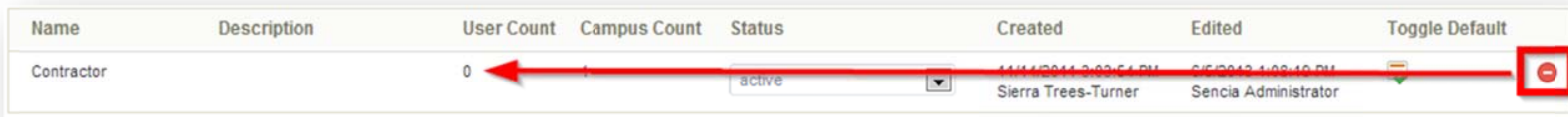
11.1.4 View Users

Navigate to the classifications page and click any user count. This will show a sortable list of users linked to a specific classification. Classifications that are not assigned to a campus are unavailable to users. Users are default sorted alphabetically by last name. To change the order, select any of the options under the **Sort Options** menu.



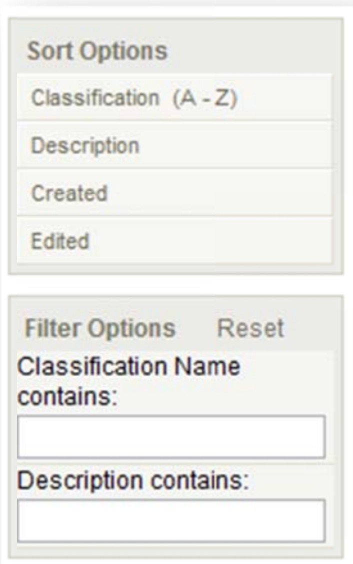
11.1.5 Delete Classifications

To permanently delete a classification, navigate to the classifications page and press the delete button. You can only delete classifications with a user count of 0. You will be asked to confirm the delete.



11.1.6 Sort and Filter Classifications

Classifications are default sorted alphabetically by name. To change the order, click any of the options under the **Sort Options** menu. To narrow your list to more specific user names, use the **Filter** menu.

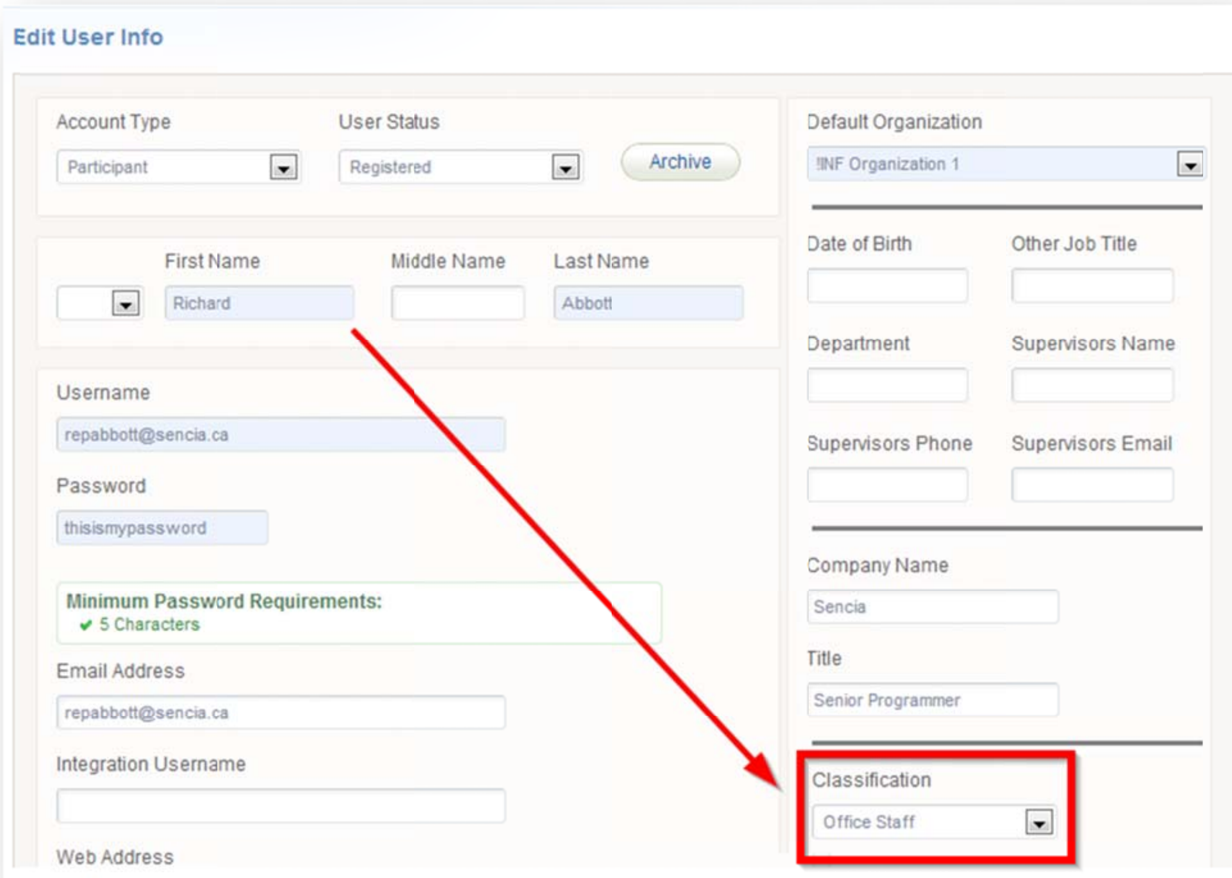


Below is a brief description of the fields:

Filter Option	Description
Reset	Choose the reset link at the top of the filter options menu to remove any filters.
Classification Name Contains	Enter a word or two that is contained in the name of the classification.
Description Contains	Enter a word or two that is contained in the description of the classification.

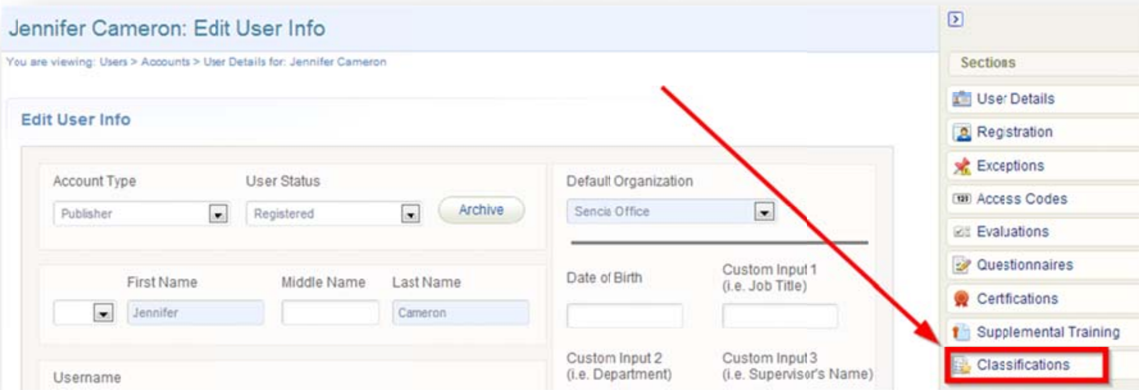
11.2 Assign Classifications to Users

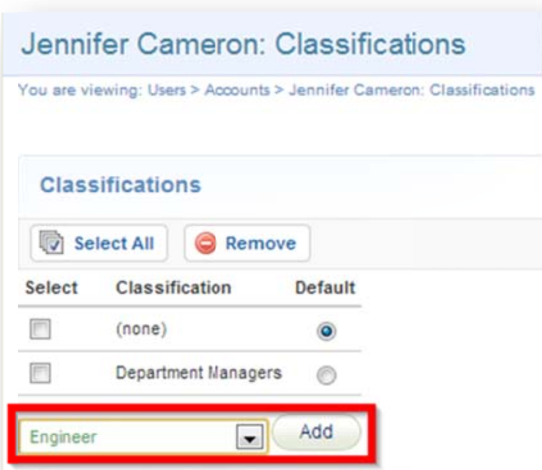
Navigate to the user's profile and select a classification from the drop down menu. The classification chosen is the user's default classification.



To assign multiple classifications, click **Classifications** from the Sections menu, and then use the drop down menu to add classifications to the user's profile. The available classifications are dependent on the user's default campus. If the user's default campus is not attached to any classifications, then there will be no classifications available to select. See Managing classifications for instructions on how to add a campus to a classification,

make the necessary joins for the campus and then go back to the multiple classifications screen, the list should be populated.





12. Utilities

This chapter covers the tools available to content authors, such as how to review assets within a course, view the results of any product, grade items for participants, add a new student to a product, activate or deactivate a product and view forum posts. Note that not all of these features may be available, depending on your system's set up.

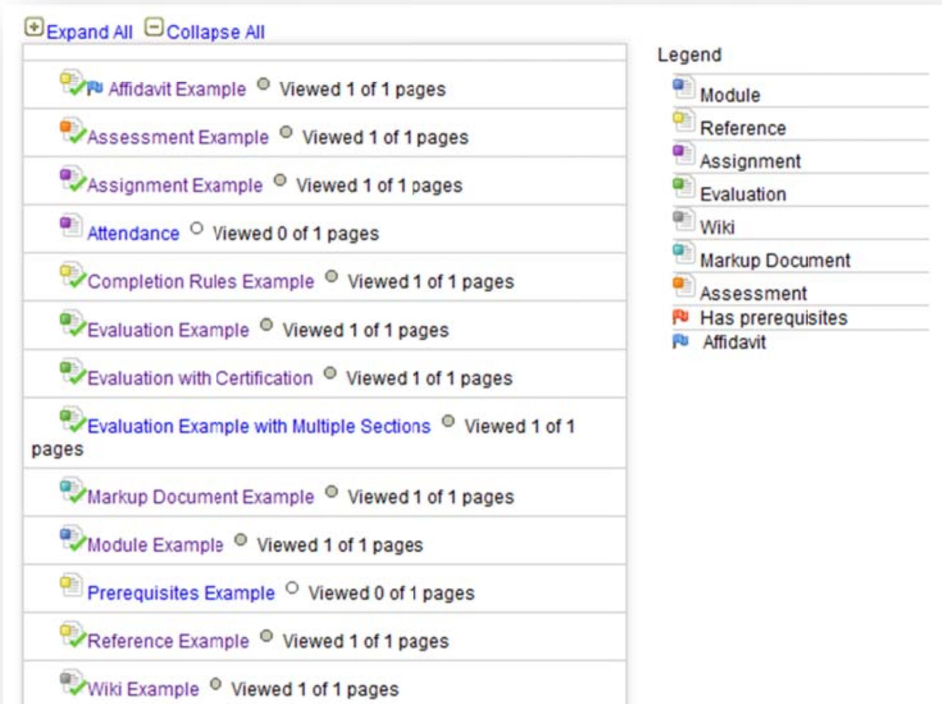
Topics Covered In This Chapter

12.1 Review Assets within a Course

Click the name of any product from the product menu on the left side of your home page to open the All Items menu unique to that product. The all items menu will give you an overview of each of the individual assets within the product. To view any of the assets as the participant sees it, simply click the name to open it. Note that utilities

12.1.1 Overview Page

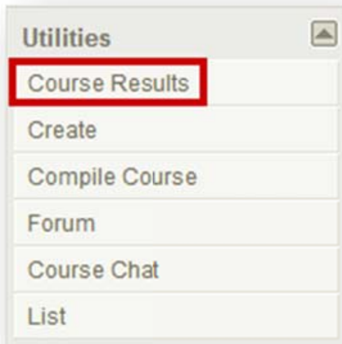
The optional overview page displays all assets available within a product. It is accessible by participants, instructors, and publishers and shows the asset type, visibility, page views and prerequisites. Below is an example of an overview within a product as it appears to participants.

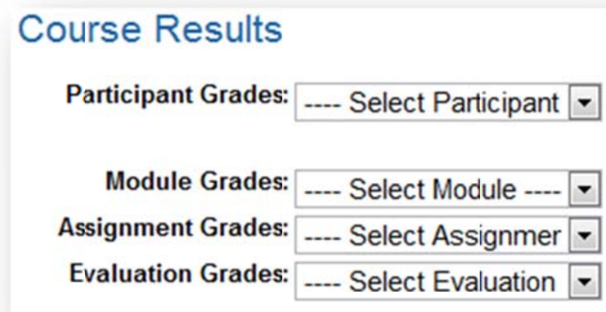


12.2 View Grades

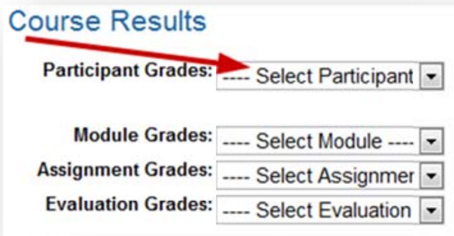
This option is available to campus admins, instructors, participants, publishers, and user group managers. Participants and user group managers can only see their own grades.

Click the name of any product from the product menu on the left side of your home page to open the Utilities menu. Click **Course Results** at the top. This will open a panel so you can select which participant or asset with in that product that you want to view grades for. Use the drop down menus on the course results page to make your selections.





Use the “Participant Grades” drop down menu to pick one person and view all of their grades for the product.



In this example, Jeanine Carlson was selected from the drop down menu and now her grades for all assets within the product can be viewed, sorted by asset type. Her total weight and overall mark for the product are also shown at the bottom.

Participant: Jeanine Carlson

Assignments

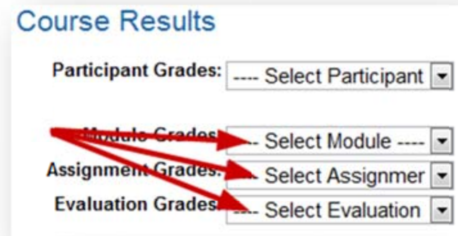
Name	Mark	Comment	Weight	Overall Mark
Assignment Example	-%	-	30%	0%
Attendance	100.00%		25%	25%

Evaluations

Name	Section	Mark	Weight	Overall Mark
Evaluation Example				
	Section One	Take 1 : 66.67 %		
	All	66.67	70	46.67
Evaluation with Certification				
	Section 1			
	All	0.00	0	0.00
Evaluation Example with Multiple Sections				
	Intersections			
	Winter Driving			
	Passing			
	All	0.00	0	0.00

Total Weight: 125 Total Mark: 71.67 %

Use the “Grades” drop down menus to view all participant’s grades for one selected asset.



In this example, module grades, assignment grades and evaluation grades are available. The image below shows an example of an evaluation selected from the “Evaluation Grades” drop down menu.

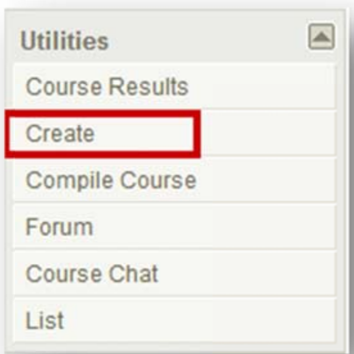
Informetica Sample Course Test - Evaluation Example
Grades as of 6/19/2012

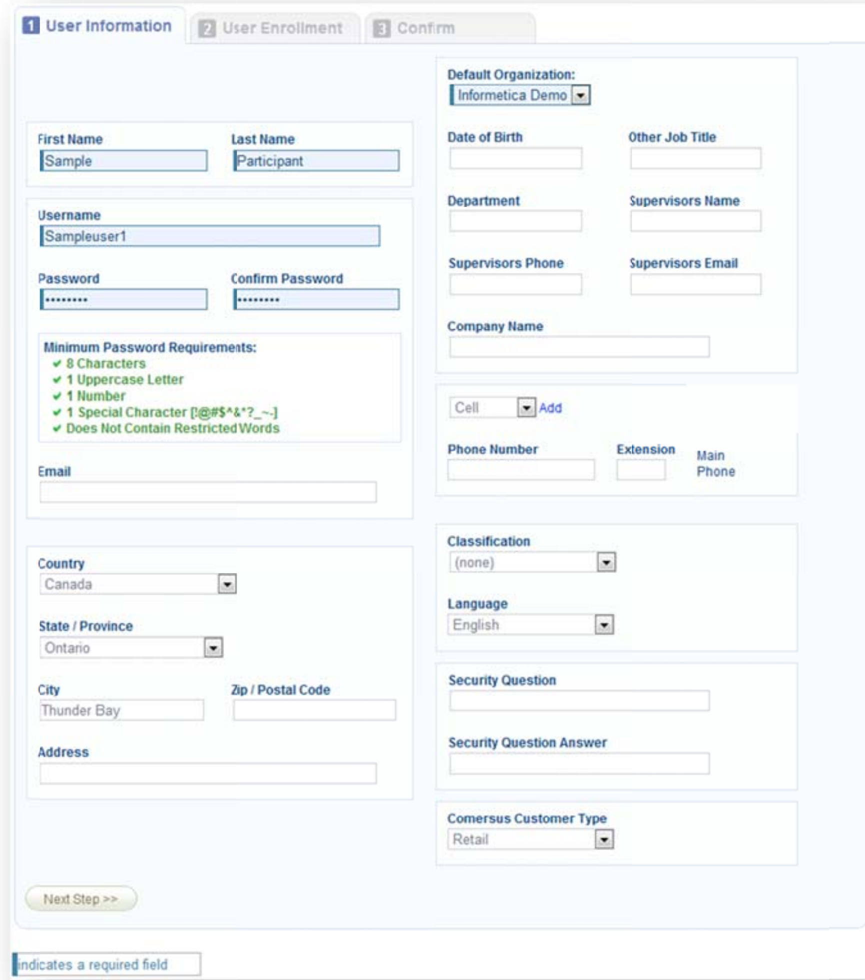
Student	Section One	Weight	Mark	Overall Mark
Bateman, Amy		70%	0.00%	0.00%
Bennet, Maria	Take1: 33.33%	70%	33.33%	23.33%
Brent, Sebastian		70%	0.00%	0.00%
Brook, Marisa		70%	0.00%	0.00%
Carlson, Jeanine	Take1: 66.67%	70%	66.67%	46.67%
Demo, Sencia		70%	0.00%	0.00%
Dick, Jon		70%	0.00%	0.00%
Doe, Trenton	Take1: 55.56%	70%	55.56%	38.89%
Doe, Alice		70%	0.00%	0.00%
Huhta, Irene		70%	0.00%	0.00%
Kim, Alfredo		70%	0.00%	0.00%
McGrath, Travis		70%	0.00%	0.00%
Saroyan, Camille		70%	0.00%	0.00%
Vorpahl, Margery		70%	0.00%	0.00%
Wieder, Serena		70%	0.00%	0.00%

12.3 Create and Enroll a New Participant

This option is available to campus admins, publishers, and instructors.

You may need to create a new account for a user who is taking a product and enroll them to that product. Click the name of any product from the product menu on the left side of your hope page to open the Utilities menu unique to that product. Click **Create** to start the three step creation process.

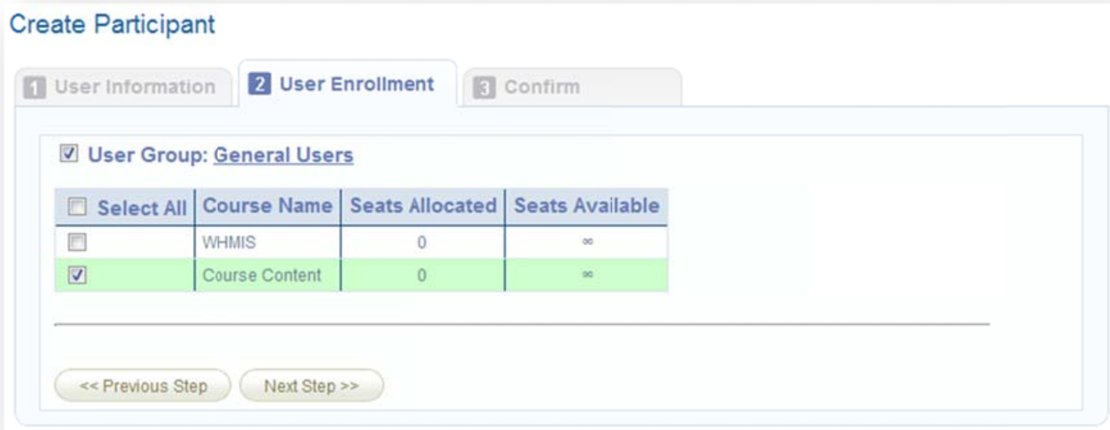




Step 1: Fill out all of the required fields for the user information and then click 

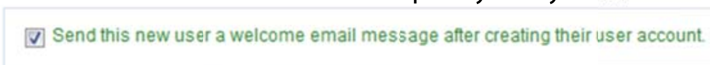
(next step button).

Step 2: Select the user group(s) and product(s) you wish to register the new participant to and then click **Next Step** Next Step >>. You may very well belong to multiple user groups, each with their own selection of products, however, in this example only one user group is available.

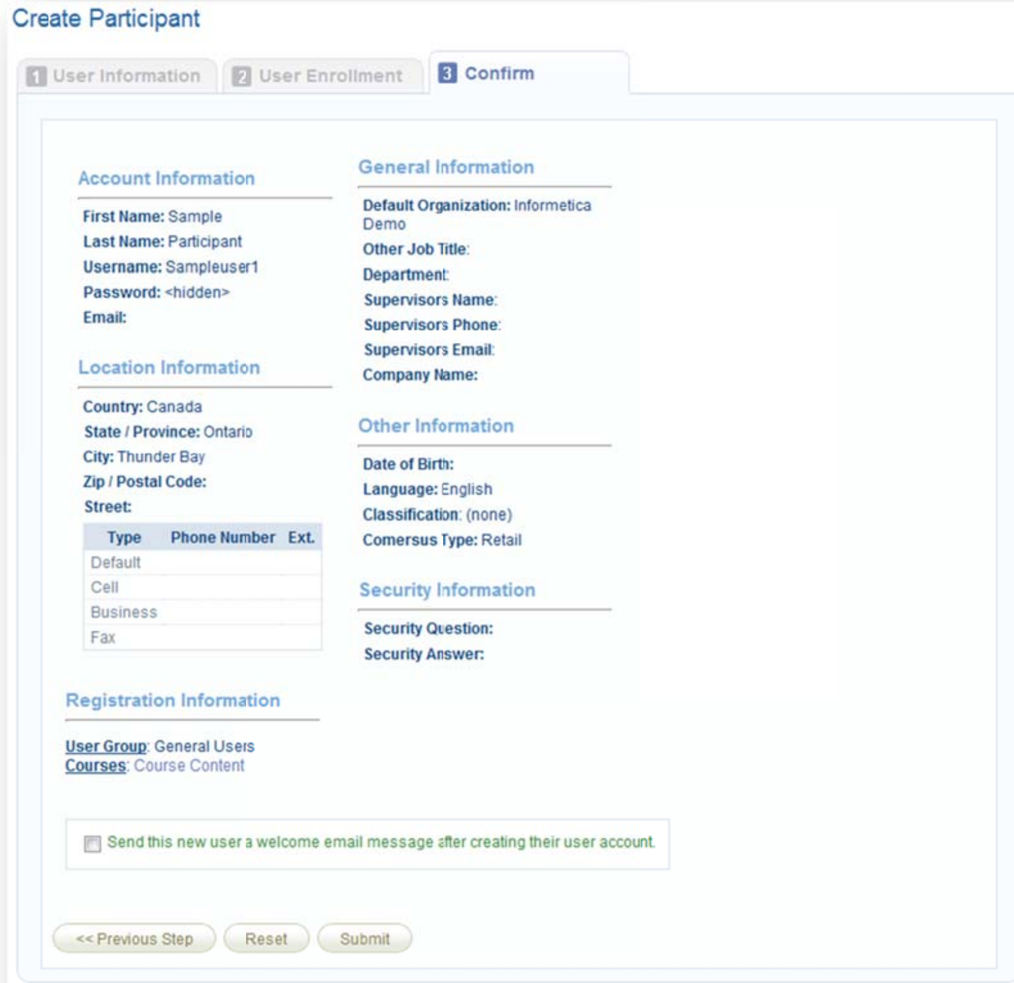


Step 3: Will ask you to confirm that the information you entered is correct and allows you to notify the participant.

- Select the box at the bottom to send an automated email to the new participant providing them with their account login information. You may wish to first check with your site manager before selecting this option to make sure that the feature is set up for your system.



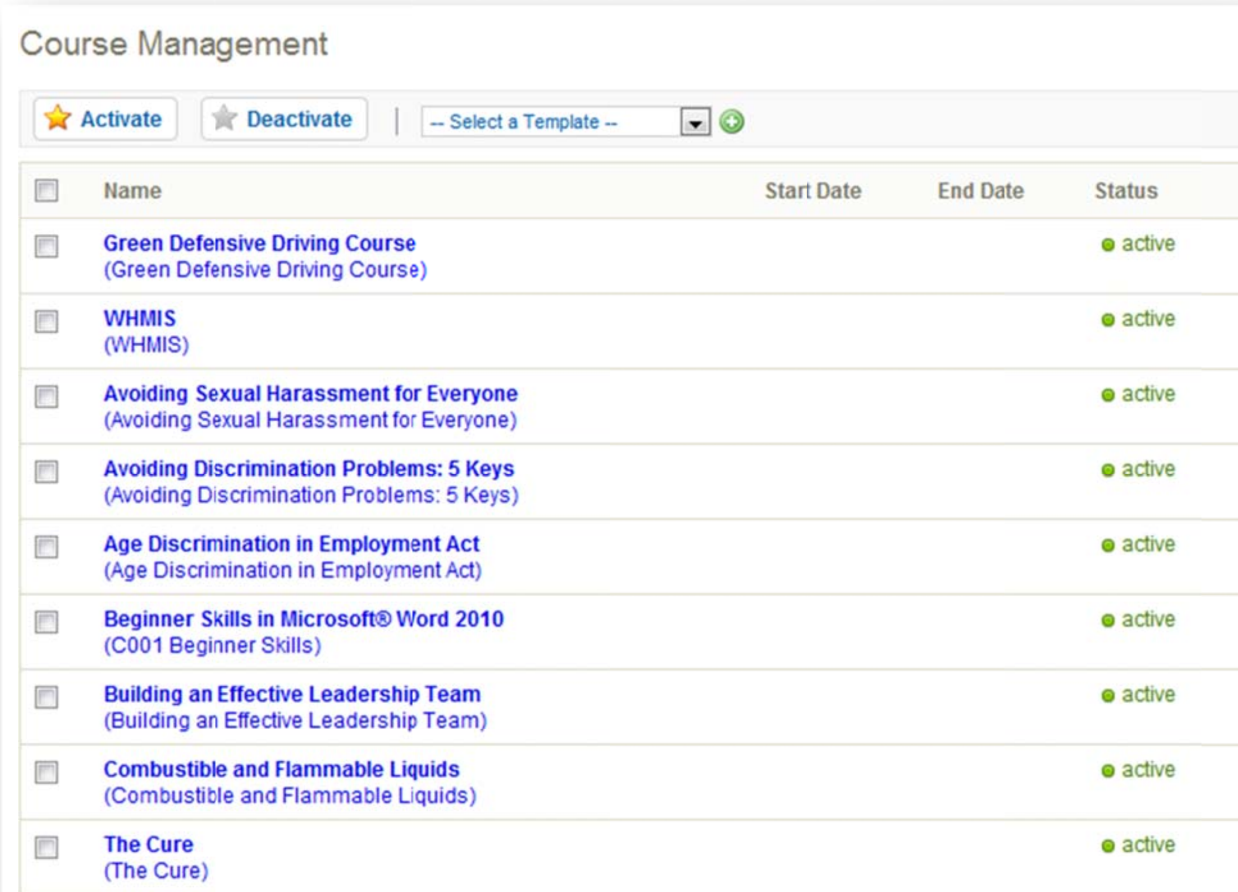
- Click << Previous Step (previous step) to go back and make a change.
- Click Reset (reset) to clear all of the information and start over.
- Click Submit (submit) to accept the information and complete the participant creation.



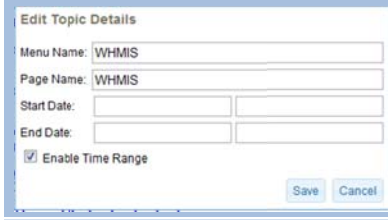
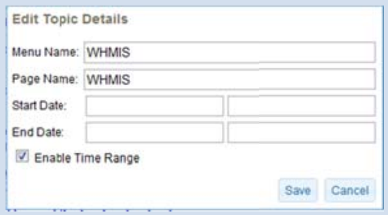
12.4Product Management

This option is available to campus admins, publishers, and instructors.

Click (wrench icon) on the left side of your home page to open a management page where you can change the title, status or dates.



Below is a brief description of the task that can be done from this menu:

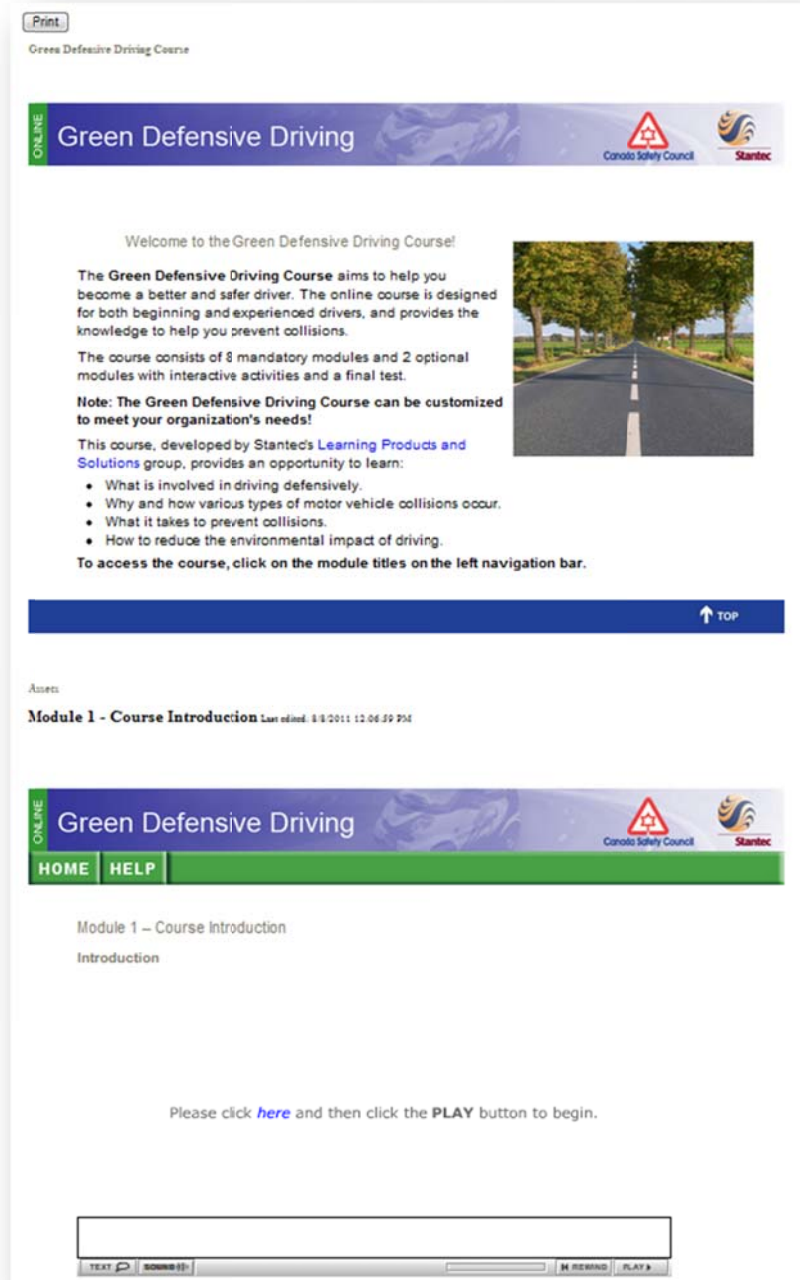
Task	Instructions
Edit Title and Menu Names	Click on the name of any product in the list to change the names of the title and menu and then save. 
Change Publishing Dates	Click on the name of any product in the list to change the publishing dates and then save. 
Status Active	Products must have an active status before you can work with them. When a new product is created, it is inactive by default. To change a product to active, check the box to the left of the product name, and then click the Activate button  at the top of the list.
Status Inactive	To change a product to inactive, check the box to the left of the product name, and then click the Deactivate button  at the top of the list.
Save	Save your new product.

12.5 Compile Course

This option is not available to site managers.

If available on your system, the compile course tool creates a printable version of the course. This compilation will include all text and images. Testing assets are not included in the printable version. Additionally, assets must be active to be compiled.

Click the name of any product from the product menu to open the Utilities menu unique to that product, and then click **Compile Course** to create a printable collection of the pages from the product. The image on the right only shows two pages from a compiled course as an example of the tool.



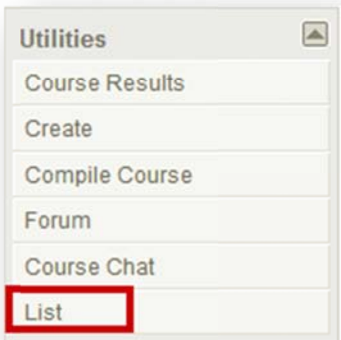
The following assets cannot be compiled:

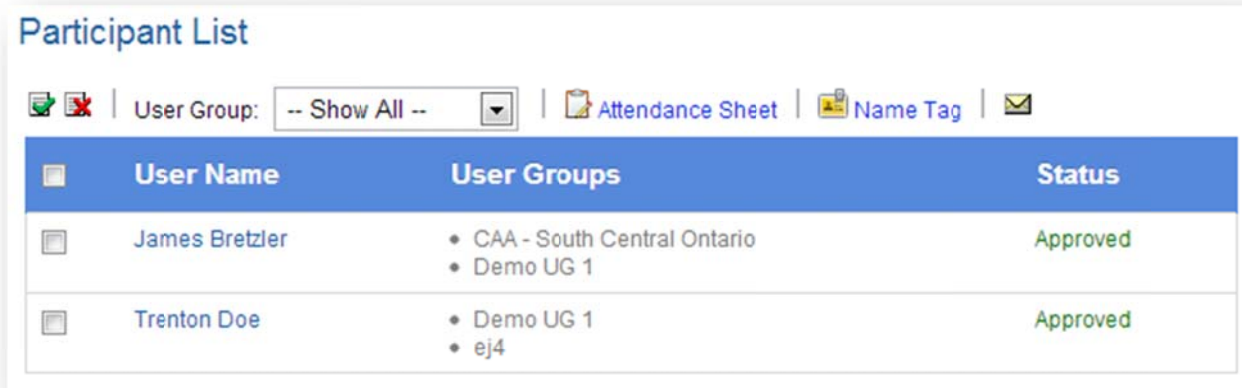
- **SCORM**
- **Tests and questionnaires**
- **Multimedia elements**
- **Inactive, hidden, popup, or overview only assets**

12.6 Participant List

This option is available to campus admins, instructors, participants, publishers, and user group managers.

Some systems let you view a list of participants enrolled to a product, approve or decline pending registrations, print out an attendance sheet, print name tags for instructor led courses, and email the class list. To access these functions, click a product to open it, and then click **List** from the Utilities menu. If you belong to multiple groups, you can selecting a group from the drop down menu at the top of the list to see only users in that group.





12.6.1 Manage Wait Listed Users

This option is available to campus admins, instructors, publishers, and user group managers.

Products configured to restrict enrolment will place all users attempting to enroll onto the product's participant list with a pending status. In this case, you must approve each enrolment and may also drop a user's enrolment at any time. A user may also drop their enrolment request prior to being approved. If desired, you may email students at any time from the product's participant list.

User names will show a status of approved, declined, or pending. Pending indicates that registration to the product has not yet been approved or declined. Select the check box in front of the names you wish to grant access or deny/remove access and then click either **Approve** or **Decline** at the top of the list.

12.6.2 Attendance Sheet

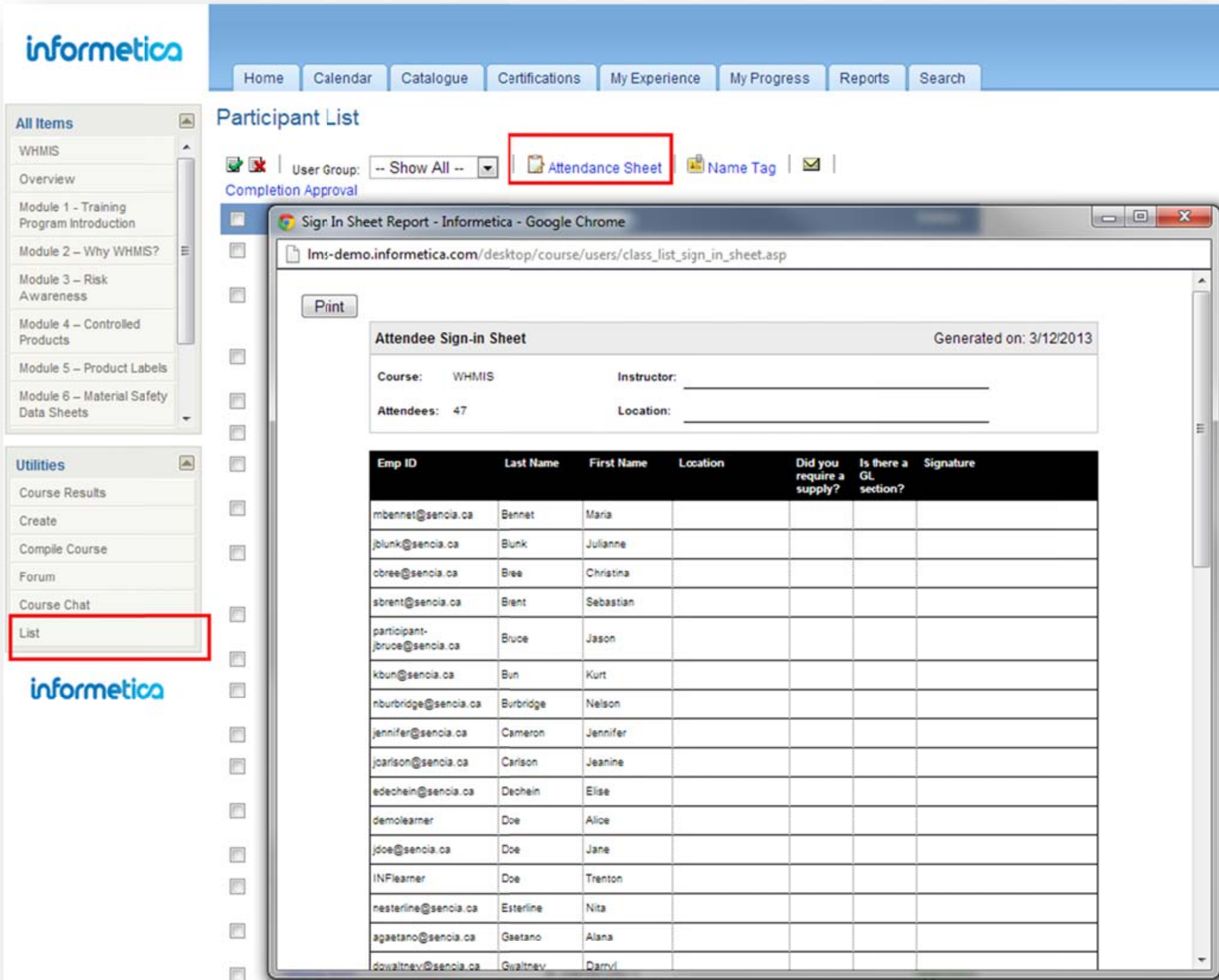
This option is available to campus admins, instructors, publishers, and user group managers

Click **Attendance Sheet** at the top of the page to generate a printable sign-in list of everyone registered to the product. Click **Print** at the top of the attendance sheet to send the sign-in sheet to your printer. This is most commonly used with Instructor Led Courses where a physical attendance will be taken on site.

Note that the fields to the right of the user information in the example below, such as “location”, will most likely be different for the attendance sheet you generate. These fields are unique based on the needs of your specific system.

Tracking Attendance for eLearning

You may run an activity report to determine a user’s logins as well as the duration spent within products and/or assets.

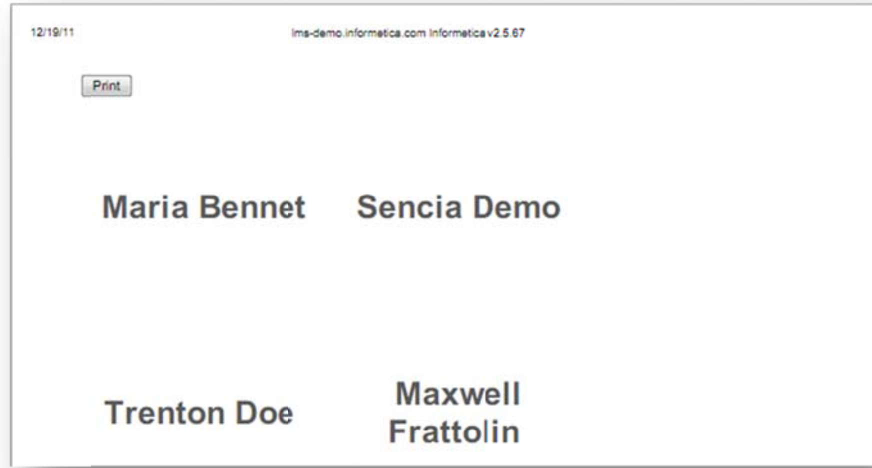


12.6.3 Name Tag

This option is available to campus admins, instructors, publishers, and user group managers.

Click **Name Tag** Name Tag at the top of the page to generate a printable list of names for everyone registered to the product that can be printed out to labels. Click **Print** button at the top of the name tag list to send the tags to your printer. The name tags are printed out on standard name tag label size, 12 labels per page.

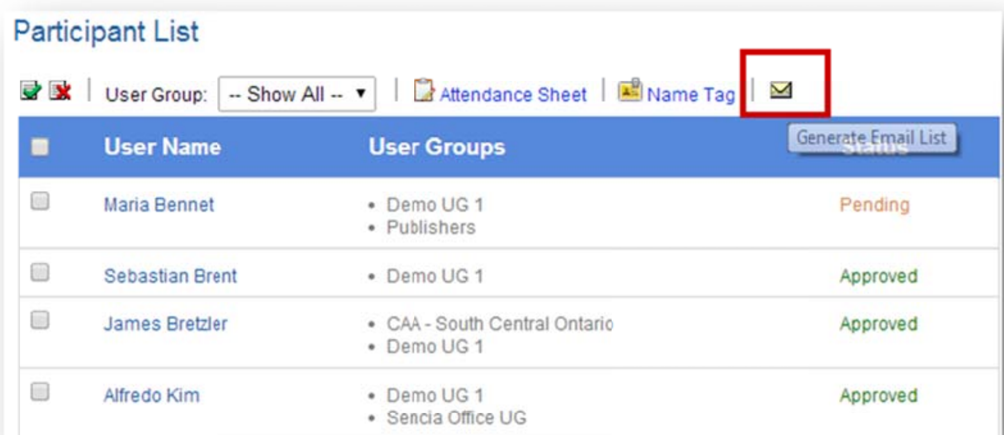
This feature is most commonly used with courses that are conducted in a classroom environment.



12.6.4 Email List

This option is available to campus admins, instructors, publishers, and user group managers.

If your system is configured for it, you can generate an email list of everyone registered to the product. The Informetica LCMS will automatically populate the addresses into the To: field of your Microsoft Outlook email. Click **Generate Email List** at the top of the page to generate the list.

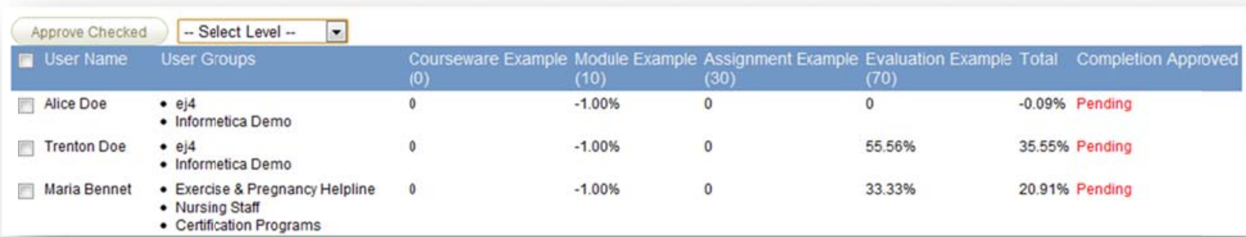


12.6.5 Completion Approval

This option is available to instructors only.

Products can be set up to require manual approval by an Instructor before the product is considered complete. This is often the case for eLearning courses that have an offline element to them, such as an assignment that must be emailed to the Instructor. For example, an Instructor running a Photoshop course may require the participant to email their final project in for review before the completion of the course can be determined.

Click **Completion Approval** at the top of the page to generate a list of names for everyone registered to the product that needs to have their completion of the product manually approved. Select the check box in front of the names you wish to approve completion of the product for and then click **Approve Checked** at the top of the list. The completion approved field will read as either pending or approved, as applicable.

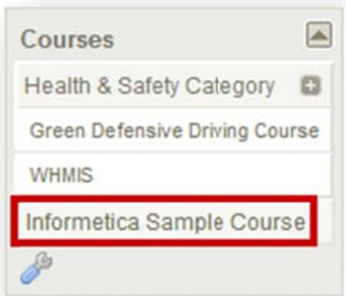


User Name	User Groups	Courseware Example (0)	Module Example (10)	Assignment Example (30)	Evaluation Example (70)	Total	Completion Approved
Alice Doe	• ej4 • Informetica Demo	0	-1.00%	0	0	-0.09%	Pending
Trenton Doe	• ej4 • Informetica Demo	0	-1.00%	0	55.56%	35.55%	Pending
Maria Bennet	• Exercise & Pregnancy Helpline • Nursing Staff • Certification Programs	0	-1.00%	0	33.33%	20.91%	Pending

12.7 Grade Items

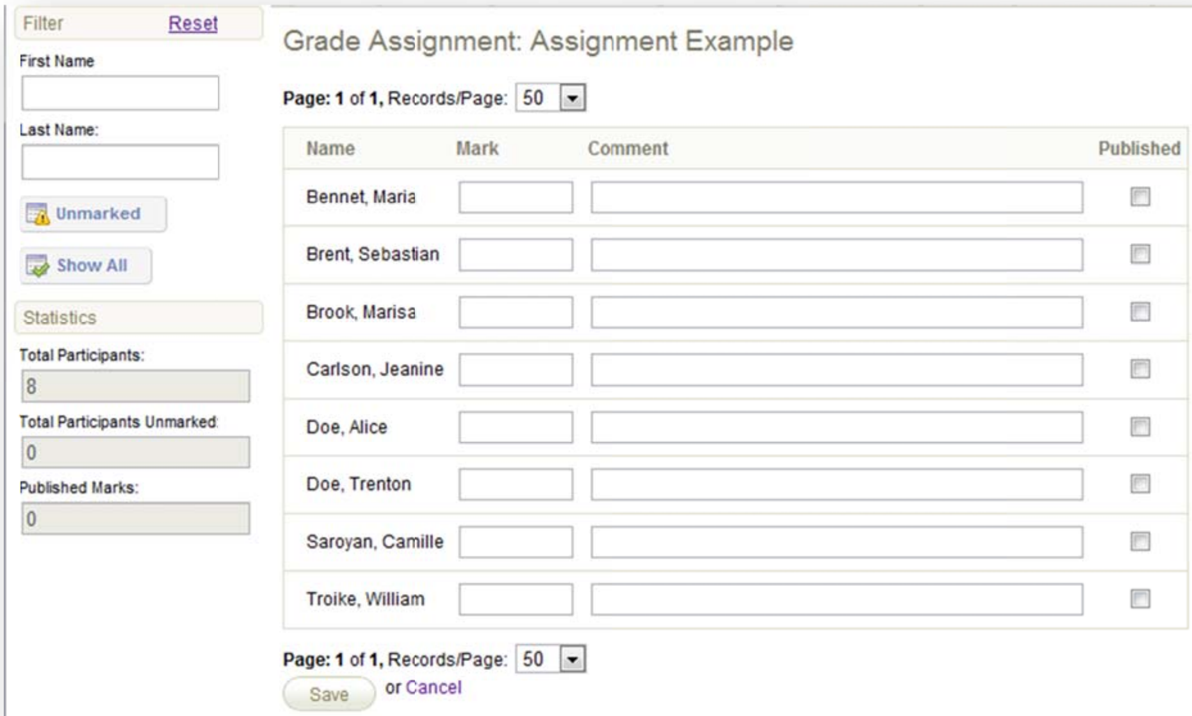
This option is available to campus admins, publishers, and instructors.

Select the asset that needs to be graded. Non-site managers must click the wrench icon To open grade the assignment page. You may have several asset types available, so scroll down to the one you need. In this example, we have opened a course called “Informetica Sample Course” in which there is an assignment that needs to be graded, called “Assignment Example”. Click the arrow on the edit button and then select **Grade**.



Filter – For long lists, the filter tool is particularly useful. Filter users in the following ways:

- Click **Reset** at the top to remove any filters.
- Enter a user’s first or last name to filter the list to see only that user.
- Click **Unmarked** to see only users who have not yet been given a grade
- Click **Show All** to show both grades and ungraded users.



Note that for evaluations and Prova tests, only essay questions are graded manually.

Statistics –At-a-glance information is available about the participants registered to the product:

- Total Participants Unmarked
- Published Marks

Mark – Here is where you can add a grade for each participant.
Comment – You may add a comment about the mark you gave a participant here.
Published – Click the check box if you want the comments to be visible to the participant.
Save – Make sure to save so the system will keep the grades you have entered.

12.8 Issue Certifications upon Approval

You can opt to manually issue certifications upon approval. There are different methods to accomplish this, as discussed below.

Step 1

- Create a gradable asset, such as a module (see the Assignments Modules References chapter).

Step 2

- Add a completion rule to the asset that requires a passing grade, such as 100% to pass (see the Products and Assets chapter).

Step 3

- Create a certification rule to include passing the asset. Use the same percentage you used when creating the completion rule in step 2.

Step 4

- Use a site manager, campus admin, publisher, or instructor account to grade the asset for users. Once the passing grade is applied, the certification will be issued (see the Products and Assets chapter).

13. Supplemental Training

Topics Covered in this Chapter

Supplemental Training Lets You:

1
- Associate internal training with exisiting products in Informetica
- Associate external training with existing certifications created in Informetica

2
- Create external training that is not associated with Informetica products

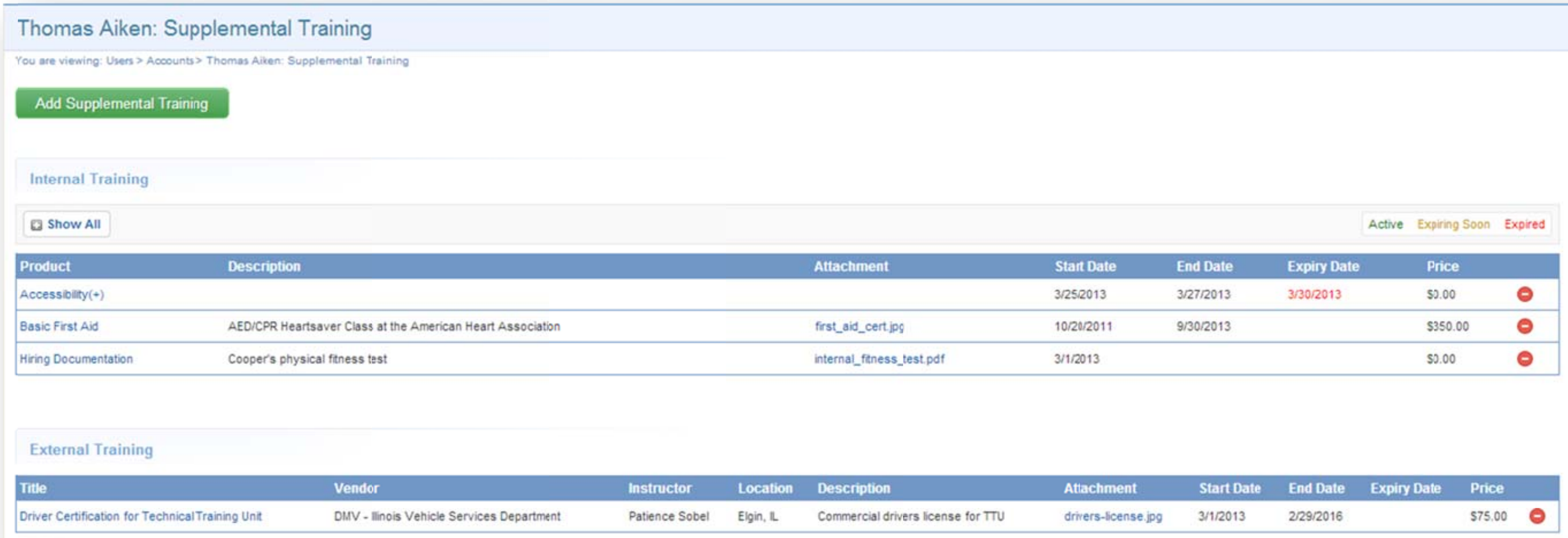
3
- Enter any associated costs for both internal and external training

4
- Upload supporting documents to training items (i.e., receipts, certifications earned)

5
- Run reports on supplemental training

6
- View supplemental training on user transcripts as active, expiring soon, or expired

Create and track user training records that are not already tracked within the LMS using Informetica's supplemental training module. For example, you can record the completion of an external seminarthat a user attended and optionally choose to associate it with a product in Informetica. You can also upload supporting documents to each user's training record, track associated costs, and use automatic email alerts to let users know when their training is expiring. Any number of supplemental training items can be added to a user's profile. These training records can be edited, deleted, and reported upon.



Below is a brief description of the fields:

Field	Description
Product	The title of the product this training is associated with.
Description	A description of the supplemental training record.
Attachment	Optional supporting document (i.e., receipts, copy of driver license) that is attached to this specific training item. Attachments can be viewed by relevant managers from this menu and by participants via their transcripts.
Start Date	The date that the training item was started by the user.
End Date	The date that the training item expires, if applicable.
Expiry Date	Enter the date that the training expires.
Price	The cost that is associated with the training item, if applicable, and easily identified with a cost report.
Delete	Select the delete button to permanently delete this training item from the user's record.

13.1 Supplemental Training for Individual Users

This option is available to site managers, campus admins, campus managers, and user group managers, depending on system configuration.

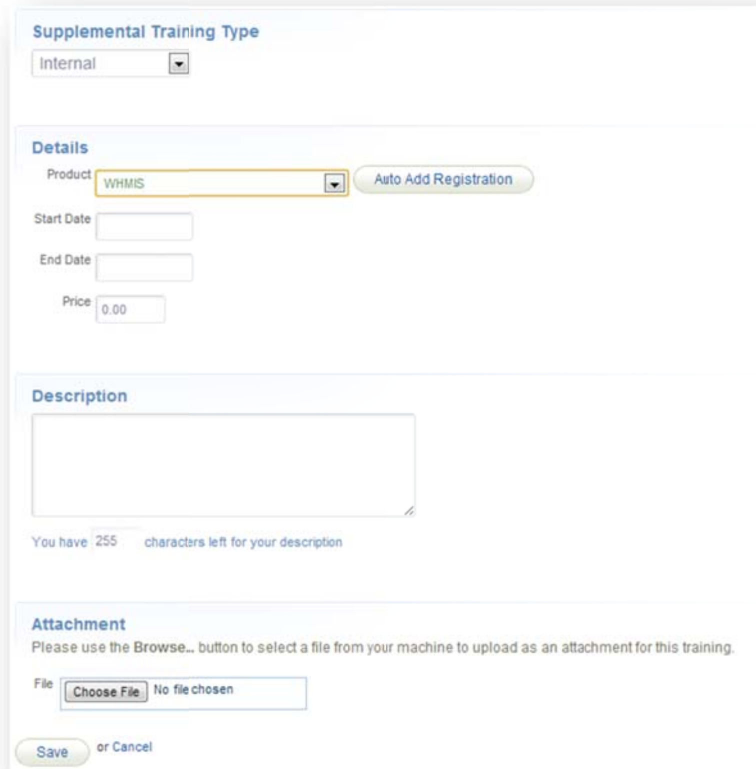
Training expiries appearing in a user's profile are colour coded, based on their active status in the system.

- **green** **items are current**
- **yellow** **items will expire soon**
- **red** **items have expired**

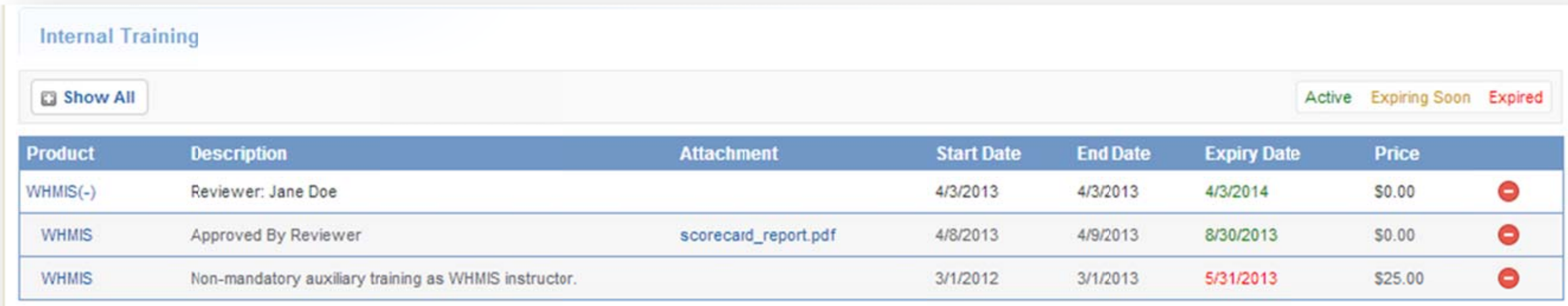
Select the Users tab, open any user account, and then select **Supplemental Training** from the Sections menu.

13.1.1 Create Internal Training

Select **Add Supplemental Training** and then select **Internal** from the drop down menu. The product listing is generated based on the groups the user belongs to. If the user is not already enrolled to the product, you can select **Auto Add Registration** to enroll them. Complete the fields on the form, upload an optional supporting document in the Attachment section, and then **save**.



You can add several records to the same training item. As you enter each record, the most recent update will appear on top while a history of each record update appears below. As you expand or contract this list, you will always see the most recent update at the top.

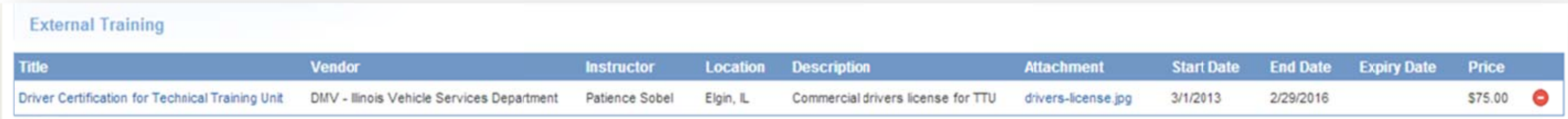


Below is a brief description of the fields:

Field	Description
Product	The title of the product this training is associated with.
Description	A brief description of the internal training.
Attachment	Optionally attach a physical file as a supporting document (i.e., receipts, copy of driver license) to a specific training item. Relevant managers can view attachments from this menu; participants view via their transcripts.
Start Date	The date that the training item was started by the user.
End Date	The date that the training item expires, if applicable.
Price	The cost that is associated with the training item, if applicable, and easily identified with a cost report.

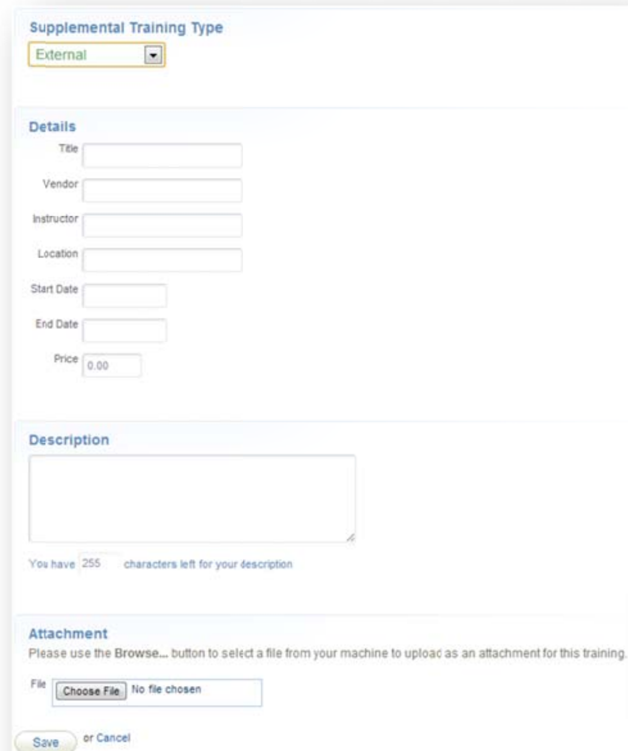
13.1.2 Create External Training

Select **Add Supplemental Training** and then select **Extenal** from the drop down menu.
Complete the fields on the form, upload an optional supporting document in the Attachment section, and then **save**.



Below is a brief description of the fields:

Field	Description
Title	The title of training completed by the user.
Vendor	The name of the company or source the training was completed with or purchased from.
Instructor	The name of the person responsible for providing the training to the user.
Location	Where the training was completed, i.e. a city, or specific building location.
Description	A brief description of the external training.
Attachment	Optional supporting document (i.e., receipts, copy of driver license) that is attached to this specific training item. Attachments can be viewed by relevant managers from this menu and by participants via their transcripts.
Start Date	The date that the training item was started by the user.
End Date	The date that the training item expires, if applicable.
Price	The cost that is associated with the training item, if applicable, and easily identified with a cost report.

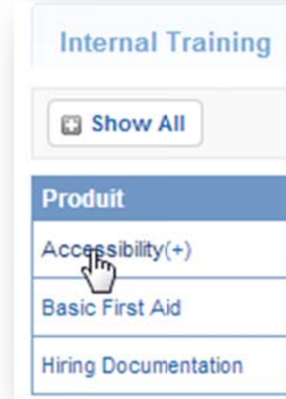


13.1.3 Delete a Record

To remove an internal or external training record from a user's profile, select **Delete** (located after the price column) for the appropriate training item.

13.1.4 Edit a Record

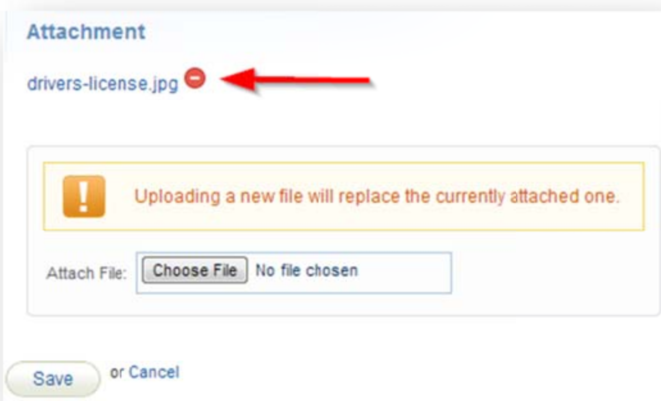
Select the name of any internal or external supplemental training record from the user's list to open en edit page. You can make changes to any of the fields, upload a new file to replace the currently attached documentation, or delete documentation.



13.1.5 Remove Documentation

You can remove the documentation associated to the training without deleting the record.

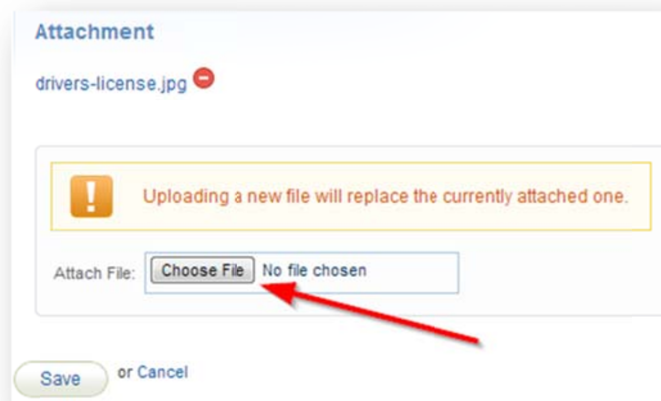
Select the name of the supplemental training record from the user's list to open en edit page. At the bottom of the edit page, under Attachment select **delete**.



13.1.6 Replace Documentation

You can upload a new file to replace the documentation associated to the training record.

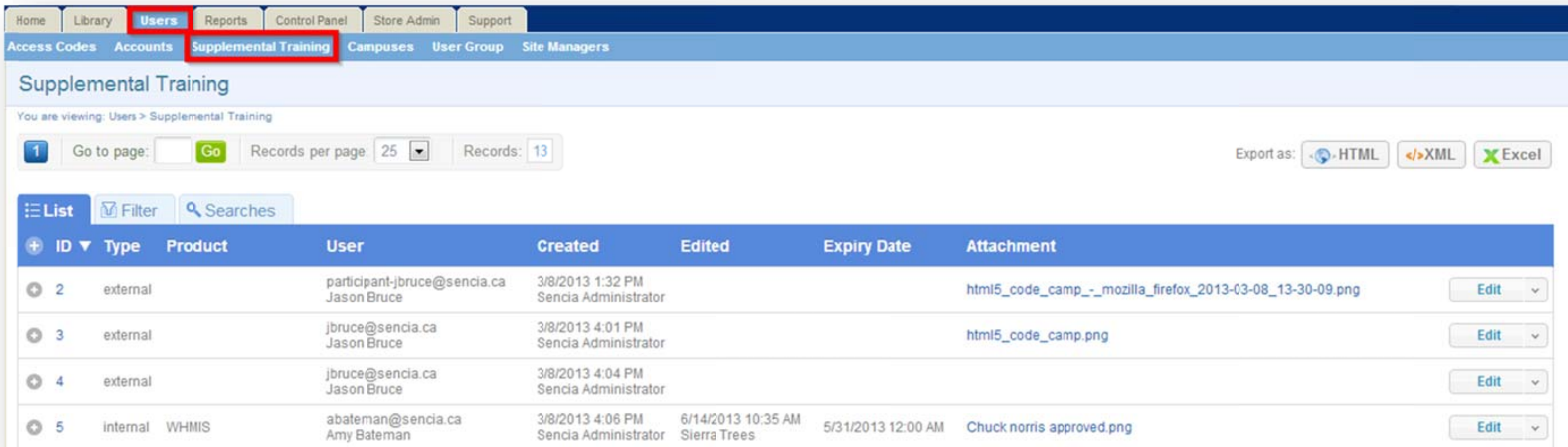
Select the name of the supplemental training record from the user's list to open en edit page. At the bottom of the edit page, under Attachment select **Choose File** to upload the new documentation.



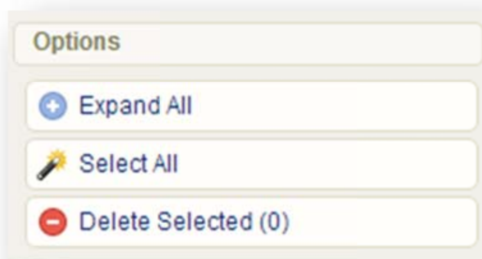
13.2 Managing Multiple Records

This option is available only for site managers and campus admins.

The best way to manage and edit multiple supplemental training records at once is via the Supplemental Training page. To access this page, select the Users tab and then click Supplemental Training. You will see a list of all the training records that currently exist within the system. This allows you to filter, quickly review records for missing criteria, edit or delete training, and add or remove attachments.



Click any column header to change the sort order.



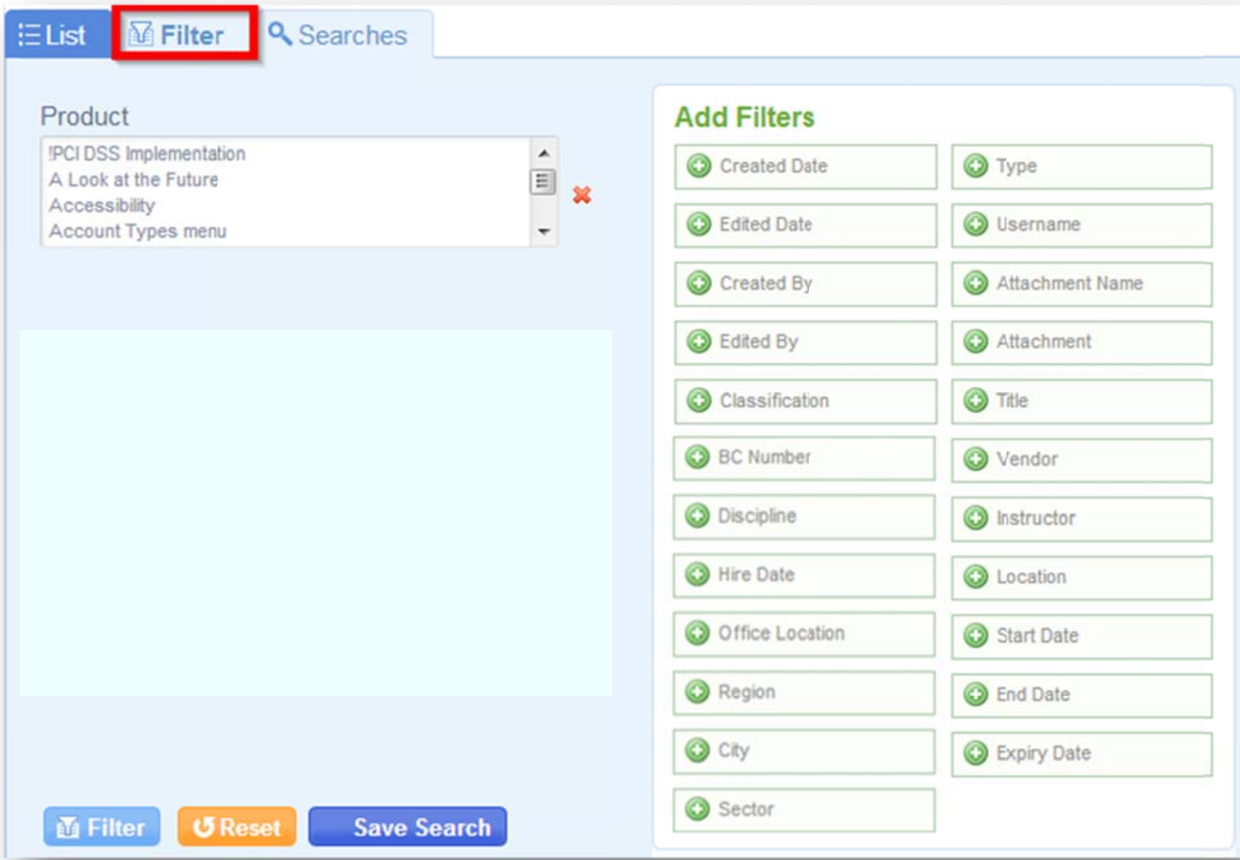
You can use the Options menu to quickly expand all records, select every record or delete selected records at once.

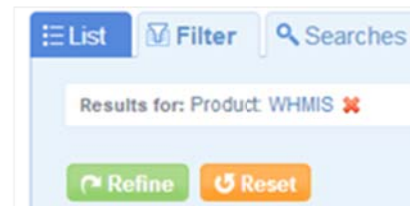
Below is a brief description of the columns:

Field	Description
ID	Informetica automatically assigns an ID to new training records.
Type	Indicates if the training is external or internal.
Product	Lists the product that internal training is associated to.
User	Indicates the username for the user that the training record is attached to.
Created	The date and time that the training record was created and by whom.
Edited	The date and time that the training record was last edited and by whom.
Expiry Date	Shows the date that the training expires, if applicable.
Attachment	A link to view any uploaded supporting documents related to the training record.
Edit	Select edit to make changes to the user's training record.

13.2.1 Filter Supplemental Training

Select the filter tab to narrow the results of the supplemental training list. Select one or more filters from the Add Filters list, enter or select criteria for each filter that you selected, and then click **Filter**. In the example below, Product is the only added filter. Use the **X** next to any added filter to remove it or **Reset** to clear all filters. You can also save your filters using **Save Search**. Select **Filter** to get the narrowed list of training. Note that filters use an OR statement. For example, if you want to select one location, but 5 products, the filter will return a list of users in the selected location with any of the five products, not all five of the products.

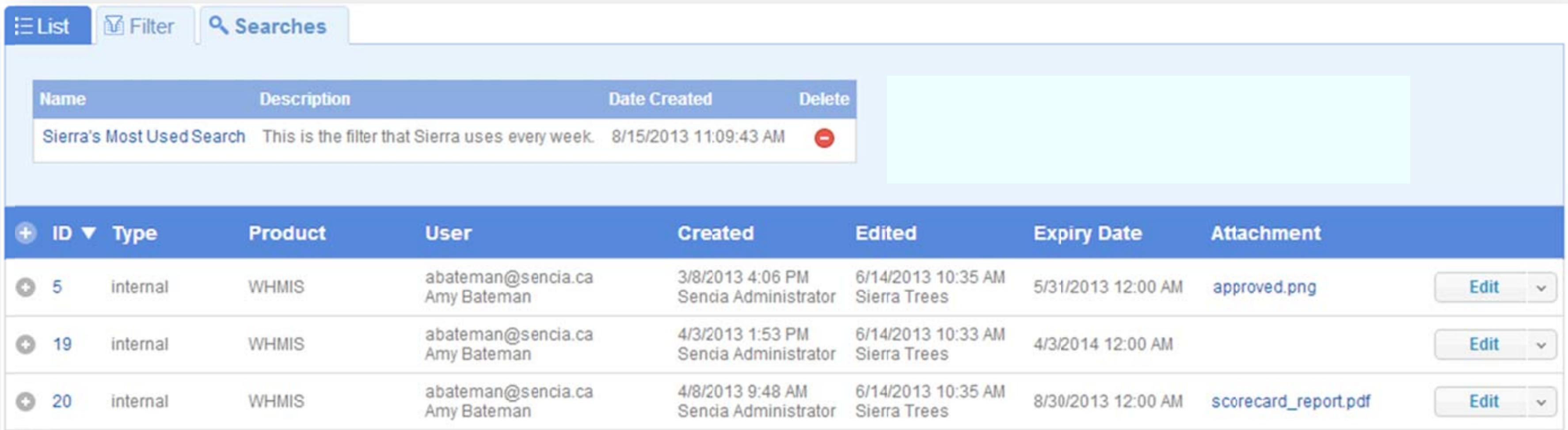




You can reset the filter or refine your results. Refine lets you change your filter options and selections.

13.2.2 Searches

To save a filter, select **Save Search** from the Filter page. You can them give the search a unique name and description. You can access any filters that you saved via the Searches tab. Select the name of the search to run the filter and see the results listed below.



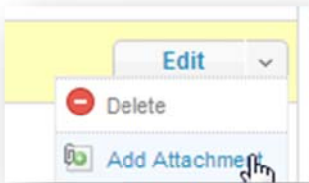
13.2.3 Export

You can export all records or a filtered list as HTML, XML or Excel. Select the relevant button from the top of the page to complete the export.

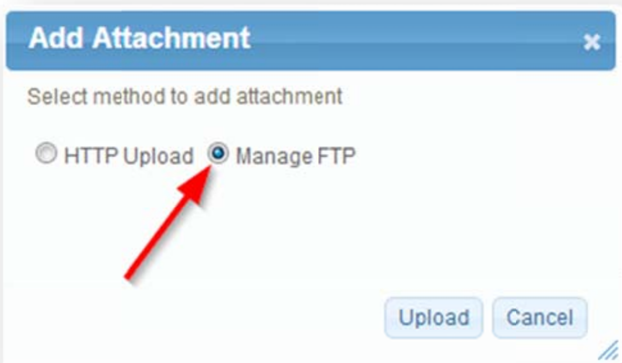
13.2.4 Upload Supporting Documents via FTP

You can pre-upload supplemental training attachments to your FTP account, and then attach the uploaded files to training records with the Manage FTP Tool as follows

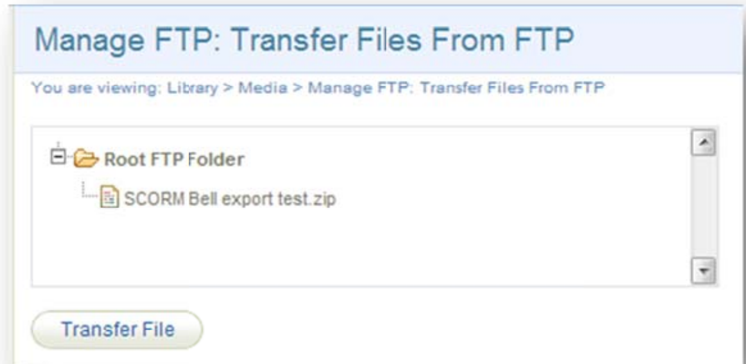
1. Select the **Users** tab and then select **Supplemental Training**
2. Select **Add Attachment** for any training item without an attachment.



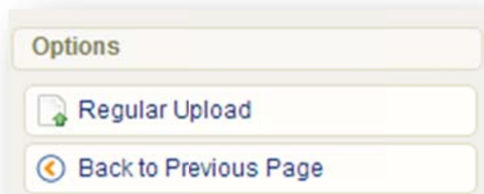
3. Choose the **Manage FTP** Option and then **Upload**



4. Select the file then **Transfer File**



5. Close the modal window and select **Back to Previous Page** from the options menu



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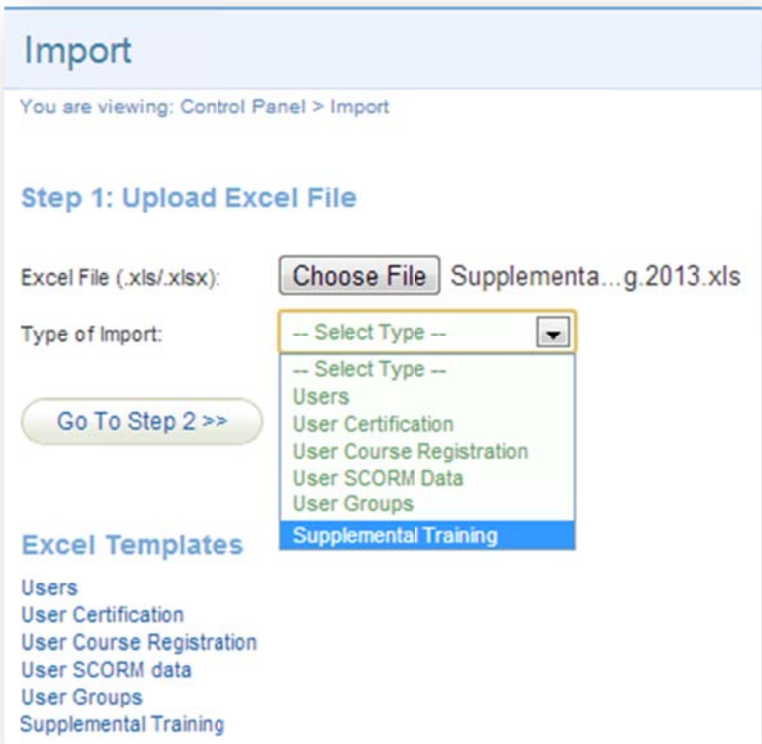
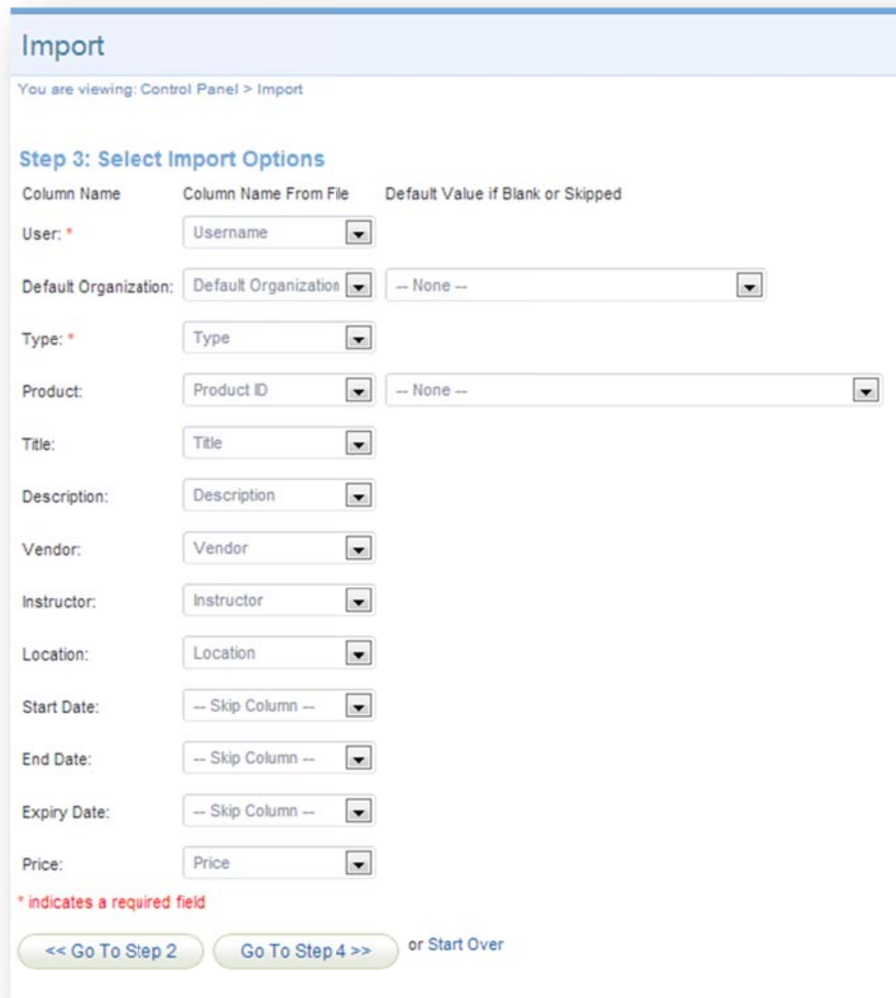
13.3 Bulk Upload Supplemental Training Records

This option is available for site managers, campus admins, campus managers, and user group managers, depending on system configuration.

You can also bulk upload supplemental training to specific Informetica users. However, attaching supporting documentation will need to be done at either the Supplemental Training page or within an individual user's profile.



For instructions on importing, please see the Importing Data chapter of this manual.



14. Products and Assets

Products (for example, courses) are the foundation of creating learning content within Informetica. Products house a collection of content, assets, components and related media used to teach participants on a specific subject matter.

Topics Covered In This Chapter

14.1 Products

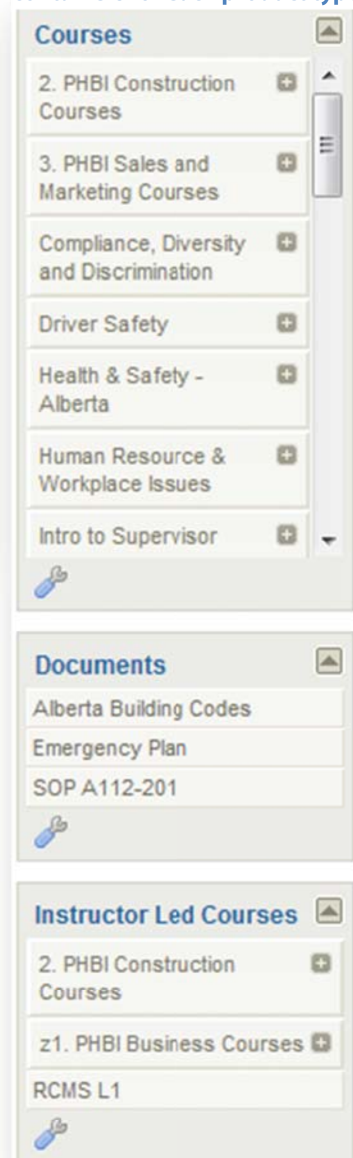
Products house a collection of assets and related media used to teach participants on a specific subject matter. Informetica allows clients to have ten different product types at a time, each with their own unique capabilities. Campuses can be configured to show all product types together in one container, or have a separate container for each product type. Some examples of the products listing on a user's home page are shown to the right.

Inactive products or products that have publishing dates that fall outside of the current date are hidden from the product list on the homepage. Campus Admins and Publishers assigned to such products still have access, however.

Products types and names can be customized for each client. Here are examples of some product types currently being using within Informetica: course, documents, eLearning, instructor led course, job listing, trials, eTraining, policies and procedures. Products can be created by site managers, campus admins, and publishers.

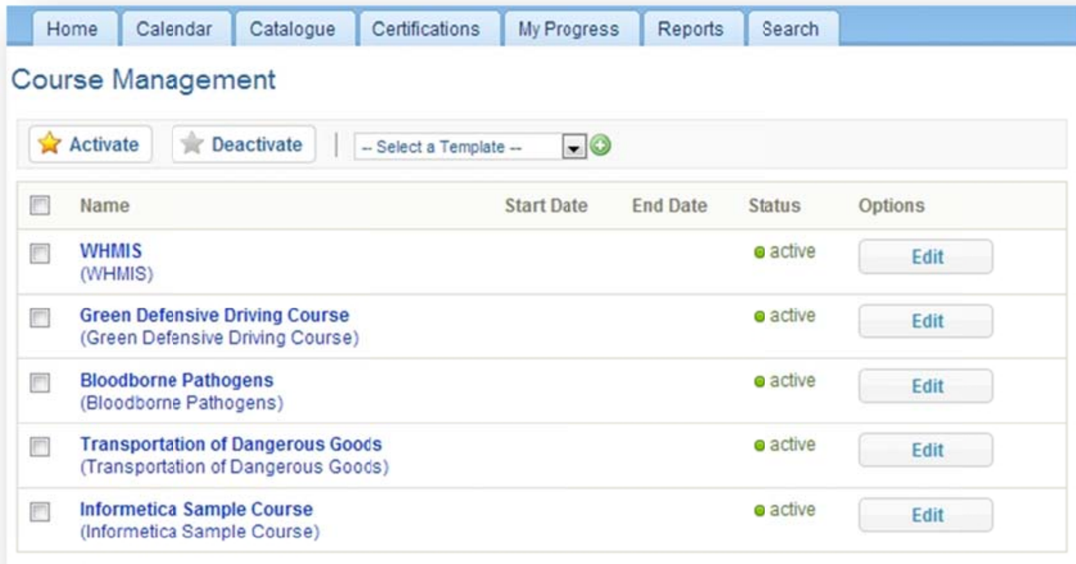
Home page shows one container for all product types

Home page shows separate containers for each product type



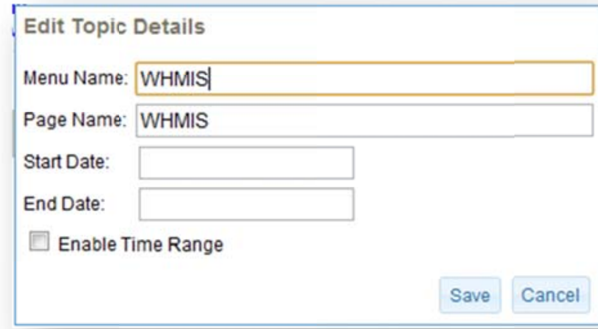
14.1.2 Product Management for Publishers and Campus Admins

The wrench icon on the home page opens a management page where publishers and campus admins can view the products they are assigned to, edit titles and assets, change the status of an existing product, or create a new product. This is also where you can access inactive products that you are assigned to, since they are not visible on the home page. Each product type has its own area, so make sure to click the wrench that corresponds with the product type you wish to edit or create.



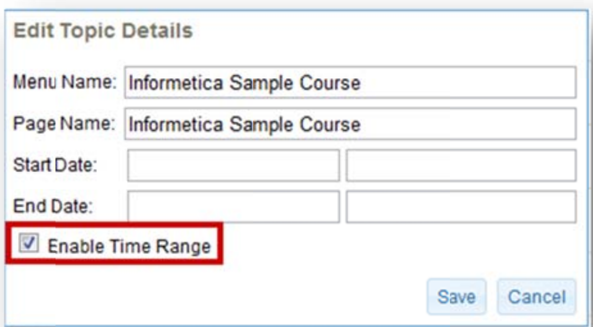
Edit a Menu or Page Name

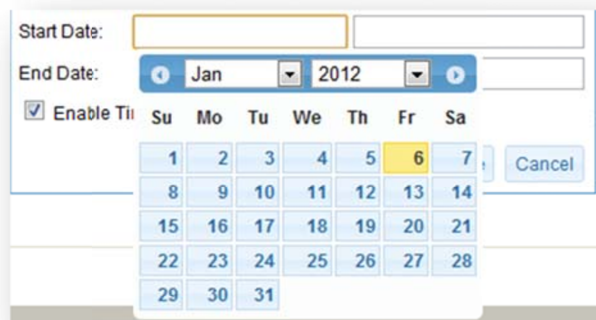
Click on the name of any product in the list to change the menu and page titles. The menu title shows in the products list and in side menus. This is often a short from of the page title. Note that left side menus have a limited amount of display; the longer your menu titles, the more cramped the display will be. The page title shows over the product page, above the content.



Change Publishing Dates

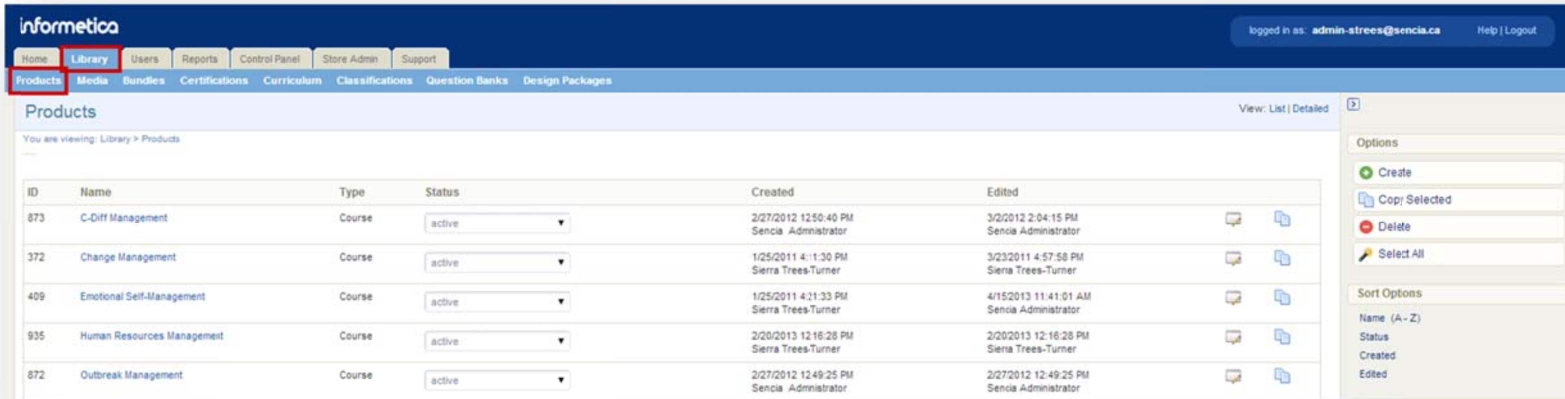
Click on the name of any product in the list to change the publishing dates. You can manually enter a date or use the calendar pop up to choose a date. Select the optional "Enable Time Range" check box insert a time range as well as a date range.





14.1.3 Product Management for Site Managers

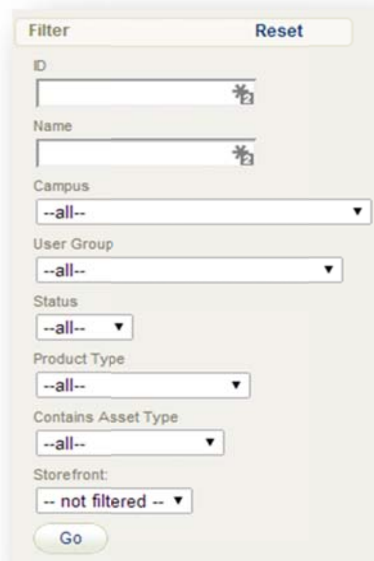
The product library is viewable only by site managers.



Informetica's library is where you can access the product and media libraries, bundles and certifications. The product library is where you can see all of the products that you have in Informetica. To open the product library, click the library tab and then the product library link.

Sorting and Filtering Products in the Product Library

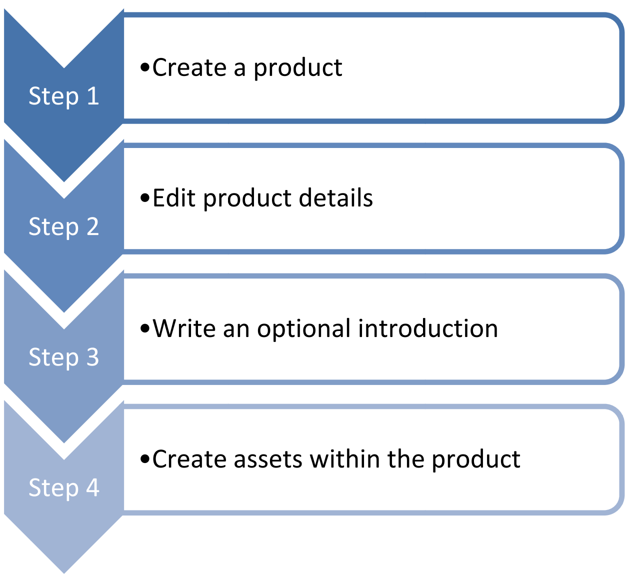
Products are sorted alphabetically by default. To change the order in which the list of products is displayed, click any of the options under the sort options menu on the right hand side: alphabetically by name (ascending or descending), status (active or inactive), creation date (oldest to newest or newest to oldest) or last edit date (oldest to newest or newest to oldest). To show only specific products, use the filter options menu on the right hand side. This is particulary useful if you have many products.



Filter Option	Description	Click Go
Reset	Choose the reset link at the top of the filter menu to remove any filters.	No
ID	Enter the unique ID automatically assigned to the product	Yes
Name	Enter a word or two that is contained in the name of the product.	Yes
Organization	Use the drop down menu to see only products assigned to a specific organization.	Yes
User Group	Use the drop down menu to see only products assigned to a specific user group.	Yes
Status	Use the drop down menu to see only products that are active or inactive.	Yes
Type	Use the drop down menu to see only products of a specific type.	Yes
Storefront	For e-commerce clients, sort the products by which store they are belong to.	Yes

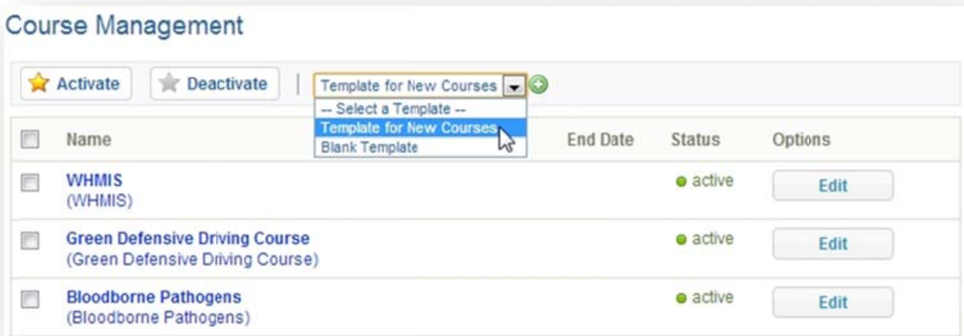
14.1.4 Create a Product

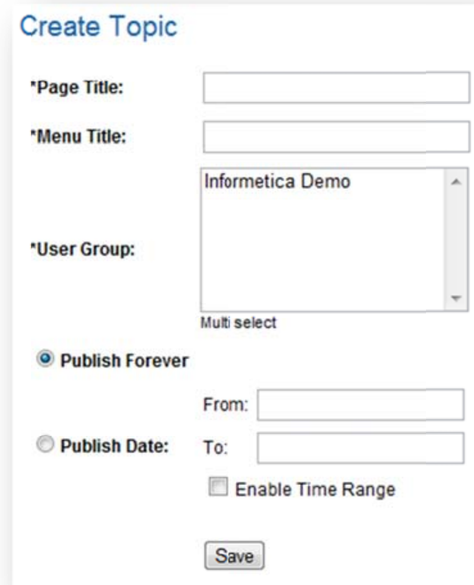
To fully create a product you will need to complete the following steps:



Publishers and Campus Admins

1. Select the wrench icon on the home page
2. Select a master (template) course from the drop down list
3. Click the plus symbol to open the create page.





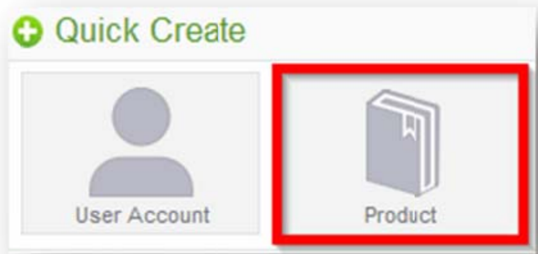
A site manager must give you access to a master product before you can create a new product.

Masters can be completely blank, or contain essential media and content to build your new product. You will need a separate master for each product type.

Create a Product: Site Managers

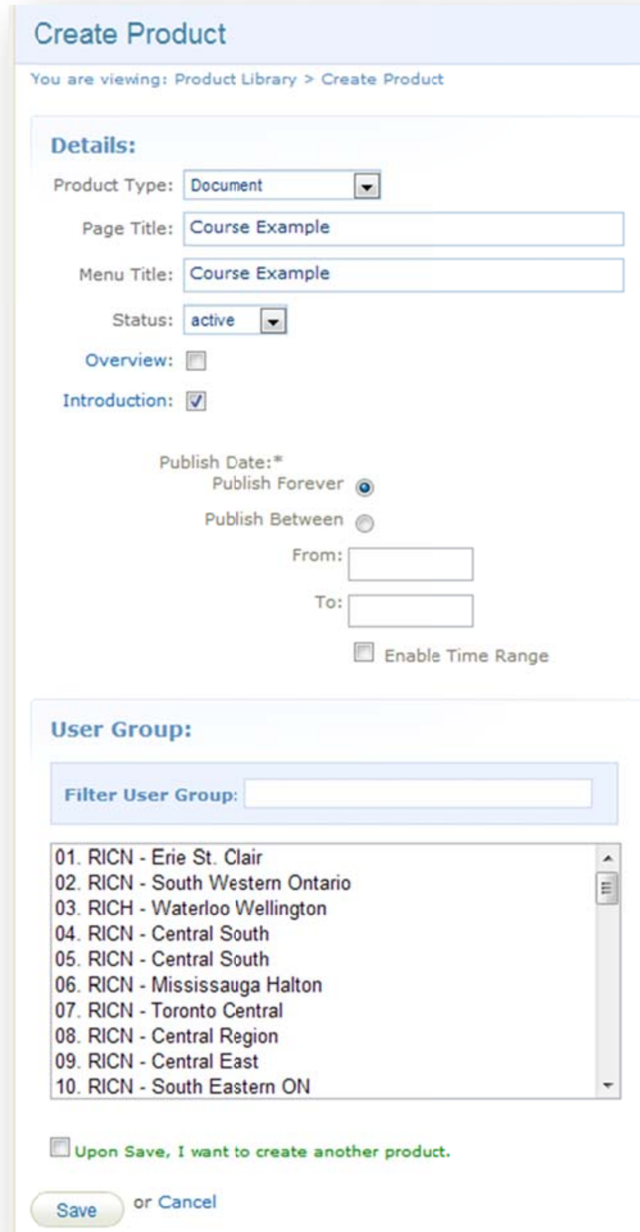
There are two methods to create a new product:

1. From the product library, select **Create** under the options menu or
2. Select Quick Create Product from the home page



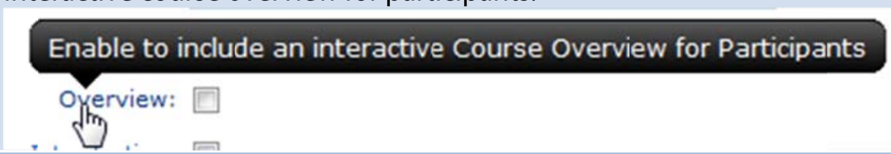
Masters: Site managers must provide at least one master course to publishers and campus admins before they can create a new product. The master will determine the product type, so if your system uses more than one product type, make sure to create separate masters for each type that you want the campus admin or publisher to be able to create. Master products are not registered to users like a typical product. Campus Admins and Publishers need only be in the same user group as the master products belong to create new products.

To make a product into a master, change the status to Master.



Create Product Field Descriptions

Below is a brief description of the available fields to fill out when creating a product. Note that not all fields may be available for your user type or system configuration.

Field	Description	Input
Product Type	Select a product type from the dropdown menu. Your configuration will have between 1-5 selections.	Required
Page and Menu Title	Enter the name of the product. The page title will show up on the top of online content pages. The menu title is what shows in the products list and in side menus. Note that menus have a limited amount of display; the longer your menu titles, the more cramped menu displays will be.	Required
Status	Select active, inactive or master from the dropdown menu. Publisher accounts need a master product to create new products.	Required
Overview	You can mouse over the word overview to read a tooltip. Check the overview box if you want to enable an interactive course overview for participants. 	Optional
Introduction	You can mouse over the words course introduction to read a tooltip. Check the course introduction box if you want to enable a custom course introduction page.	Optional
Provider	This is an available custom text field that can be used by clients to store additional information about their products. For example, this system uses a provider field to track who they order their online content from.	Optional
Publish Date	Select publish forever if you want the product to be always available or select a specific publish date if your product will be unavailable during or before a certain date. You can also add a time range to your dates by checking the box "Enable Time Range". A product that is published forever is available to all participants with access. A product that is published for specific dates is also available to all participants with access, but only during the published dates. If the product falls before or after the published dates, registered participants would no longer see the product.	Required
User Group	Select a user group from the dropdown menu.	Required
Save	Check "upon save, I want to create another product" if it applies.	Required

14.1.5 Listing Products in a Specific Order on the Home Page

Products are listed alphabetically on a participant's home page. Some clients like the products to show up in a different order. You can add a prefix to the menu title of any product to have them shown in a specific order.

Prefix Example for Ordering Key Employee Information

01. Mailing Information
02. Shipping Addresses
03. Organization Charts

Prefix Example for Ordering Basic Furniture Sales Products

BFS1 Assessing Customer Needs
BFS2 Seating Sales
BFS3 Desking Sales

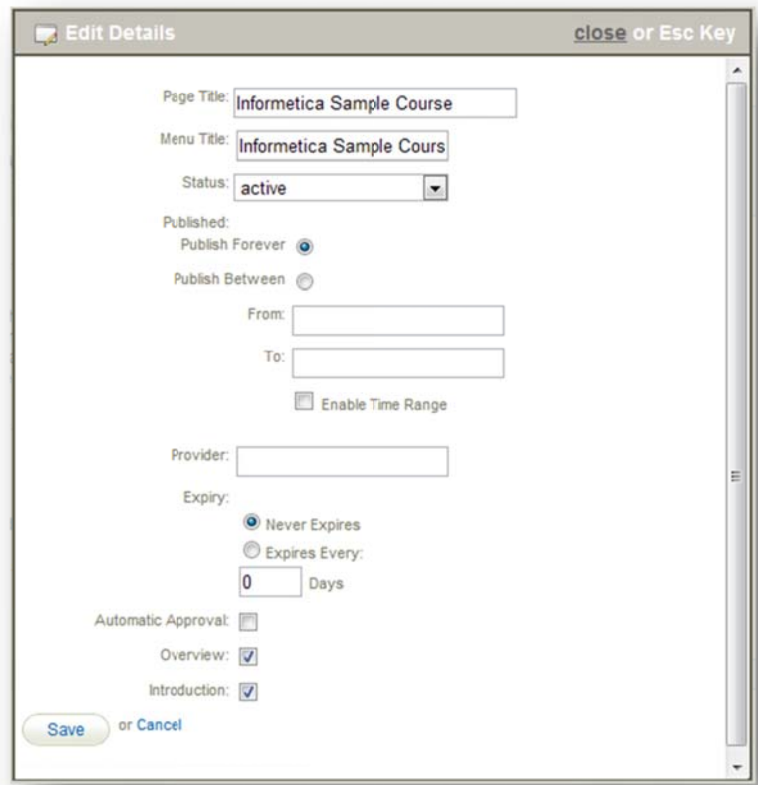
Note that if you have two products using the same prefix (i.e. 01.) they will appear together on the list for any participants who have access to both products. Also keep in mind that product categories will change how products are listed as well.

14.1.6 Edit Product Details

The product details are set up when the product is created. Editing details from the edit page offers some additional options that are not available when a product is initially created. The specific options available to you may differ and are based on your system's configuration. Therefore, you will want to edit product details after your initial product creation.

To go back and edit these details at any time, open a product and then click the edit link in the details column.

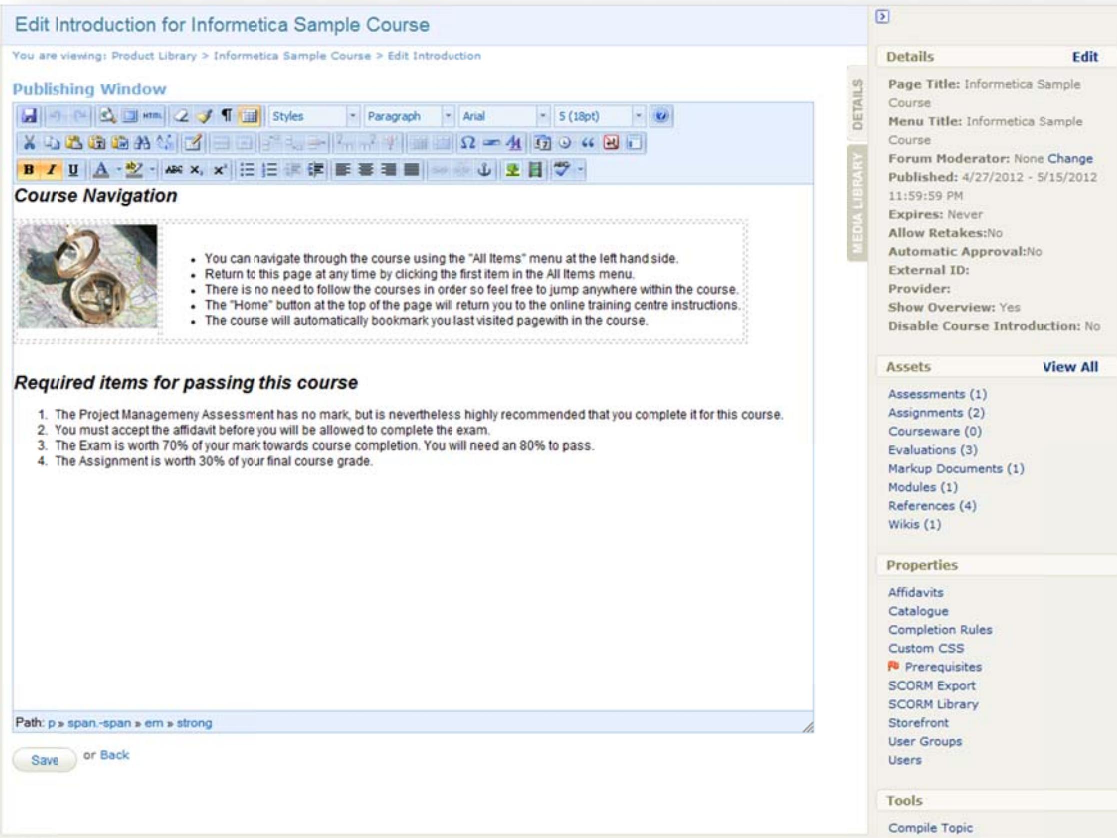
A product must be active before you can open or edit it or any of the assets within it.



Field	Description	Input
Page and Menu Title	Enter the name of the product. The page title will show up on the top of online content pages. The menu title is what shows in the products list and in side menus. Note that menus have a limited amount of display; the longer your menu titles, the more cramped menu displays will be. Alternately, from the home page, click the wrench icon at the bottom of the products list to open the product management page.	Required
Status	Select active, inactive or master from the dropdown menu.	Required
Published	Select publish forever if you want the product to be always available or select a specific publish date if your product will be unavailable during or before a certain date. You can also add a time range to your dates by checking the box before "Enable Time Range". A product that is published forever is available to all participants with access. A product that is published for specific dates is also available to all participants with access, but only during the published dates. If the product falls before or after the published dates, registered participants would no longer see the product. Alternately, from the home page, click the wrench icon at the bottom of the products list to open the product management page.	Required
Provider	This is an available custom text field that can be used by clients to store additional information about their products. It will be named whatever your site manager determined. In this example, the system uses a provider field to track who they order their online content from.	Optional
Expiry	The expiry determines the duration that a participant will have access to the product after they register to it.	Optional
Allow Retakes	Check the box to allow users to retake the product.	Optional
Automatic Approval	Check the box to automatically enroll any participants who register to the product for immediate access or leave it unchecked if the participant will be placed on a waiting list for an instructor or site manager to approve enrolment.	Optional
Show Overview	Check the overview box if you want to enable an interactive course overview for participants.	Optional
Enable Course Introduction	Check the course introduction box if you want to enable a custom course introduction page.	Optional

14.1.7 Introduction Page

The optional course introduction is often used to display information to participants such as what to expect for the course, pertinent directions, estimated time for completion, etc. Edit or enter the content with the WYSIWYG editor and then click save.



A hidden introduction can make the utilities menu inaccessible in a few specific cases. For example, a course with a hidden introduction where the first asset is a Prova test or there is only a single asset such as a Prova test or a SCORM video launch.

14.1.8 Products Menu Legend

This legend is viewable only by desktop users, such as instructors, publishers and campus admins.

Products that have a strikethrough are not available to participants and are not seen when they log into Informetica. Changing a product's status to inactive will make it unavailable to participants as will changing the Publishing date.

Products that show up in **teal** have completion rules assigned to them and are incomplete.

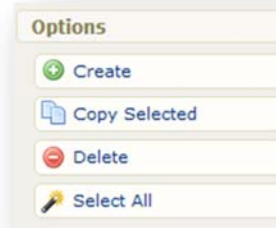
Products that show up in ***green italics*** have completion rules assigned to them and are complete.

Names with a plus symbol next to them indicate that they are bundled products. Press the plus symbol to open the list of individual products within the bundle.

14.1.9 Copy a Product

This option is available only to site managers.

Select the products you would like to copy by clicking them in the product library. Click copy selected in the options menu on the right. Alternatively, if you have only one product you wish to copy, you can press the copy button on the specific product from detailed view. Both options will open a new screen with the following fields:



Field	Description	Input
Page Title	This page title is the product name and will show up on the top of online content pages.	Required
Menu Title	This title shows in the products list and in side menus. Note that menus have a limited amount of display; the longer your menu titles, the more cramped menu displays will be.	Required
User Group	Select a user group from the dropdown menu.	Required
Publish Dates	Select publish forever if you want the product to be always available or select a specific publish date if your product will be unavailable during or before a certain date. A product that is published forever is available to all participants with access. A product that is published for specific dates is also available to all participants with access, but only during the published dates. If the product falls before or after the published dates, registered participants would no longer see the product.	Required
Status	Select active or inactive from the dropdown menu.	Required

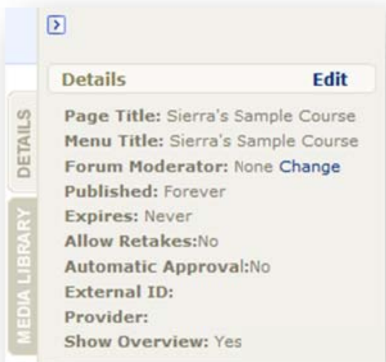
After saving, you will be brought back to the product library page.

While campus admins and publishers cannot copy over an entire product, they can copy the assets from one product into a new product and recreate any information from the introduction page.

14.1.10 Expiry and Automatic Approval

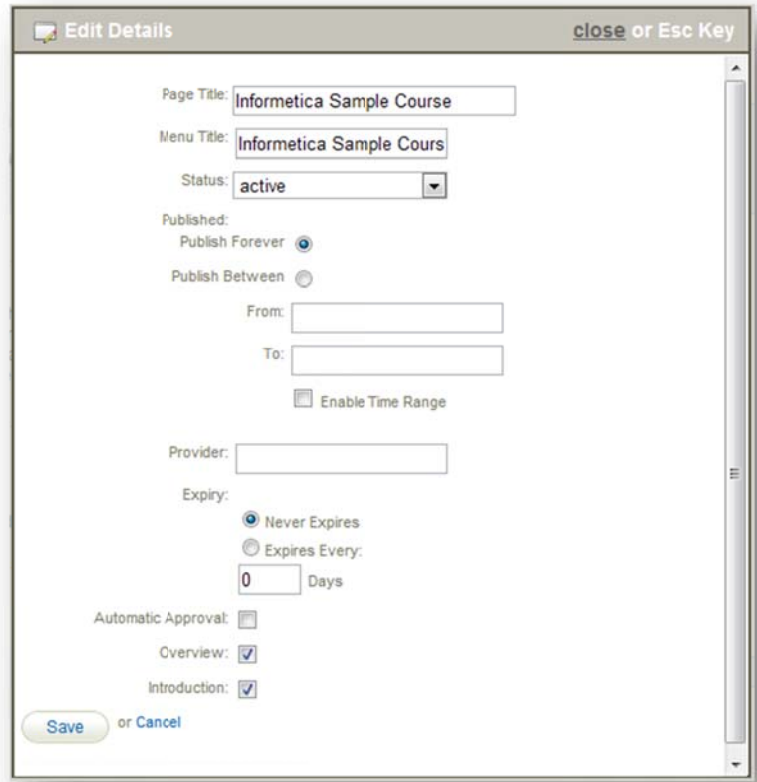
Additional options that were not available when the product was initially created are available from edit details, specifically expiry and automatic approval. The specific options available to you may differ and are based on your system's configuration.

Find the product that you would like to add additional options to and then click the edit link in the details column in the side bar of any product. To navigate to the details column, click the title to open the product.



Expiry: Expiry determines the duration that a participant will have access to the product after they register to it. Define the expiry in number of days, i.e. enter 30 days for one month, and enter 365 days for one year.

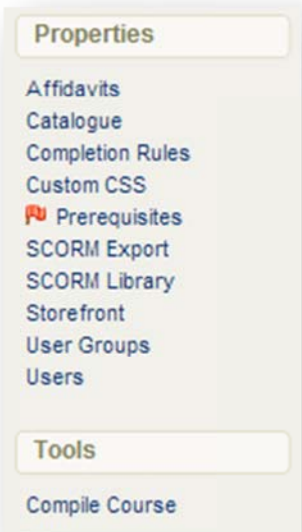
Automatic Approval: Check the box to automatically enroll any participants who register to the product for immediate access or leave it unchecked if the participant will be placed on a waiting list for an instructor or manager to approve enrolment.



14.1.11 Properties and Tools Menus

This option is available only to site managers.

Open any product to view the Properties menu. This menu gives you access to some additional tools and information about the product.

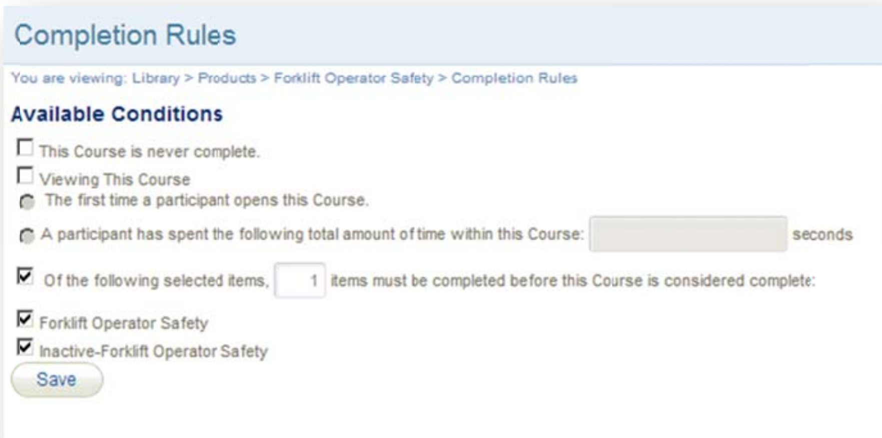


Field	Description
Affdavits	Click affidavits to show a list of all affidavits set up within this product and which assets they belong to.
Catalogue	Catalogue lets you add or edit the description for the product as it appears to anyone with access to the catalogue, if a product catalogue is in use with your system.
Completion Rules	Completion rules are conditions that must be satisfied by a participant before a product is considered completed. Setting up completion rules is optional and by default all products are set up as never complete. See more in this chapter under Completion Rules.
Custom CSS	Click custom CSS to upload or write a custom style. This is typically used by site managers who are familiar with CSS code.
Prerequisites	Click prerequisites to define other products that must be completed before a participant can access this product.
SCORM Export	Use this tool to create a SCORM file of your product if it was built within Informetica. Note that this tool will be ineffective if you already have SCORM components.
SCORM Library	The SCORM library will let you delete or download SCORM files that have been uploaded to this product.
Storefront	Click storefront to add, remove, or edit this product on your storefront. For more on the storefront, please visit the storefront chapter of the site manager manual
User Groups	Click user groups to view or edit the user groups that this product belongs to.
Users	Click users to show a list of all users registered to this product.
Compile Course	If available on your system, the compile course tool creates a printable version of the course. This compilation will include all text and images. Testing assets are not included in the printable version. Additionally, assets must be active to be compiled.

14.1.12 Completion Rules at the Product Level

This option is available only to site managers.

Completion rules are optional conditions that must be satisfied by a participant before a product is considered completed. Setting up completion rules is optional and by default all products are set up as never complete. Click completion rules from the properties menu to add or edit a rule set up for this product. Select one of the completion rules from the available conditions offered and then click "save". Note that completion rules must be set up prior to creating Prerequisites.



Completion rules are not necessary for a participant to receive a grade or a certification.

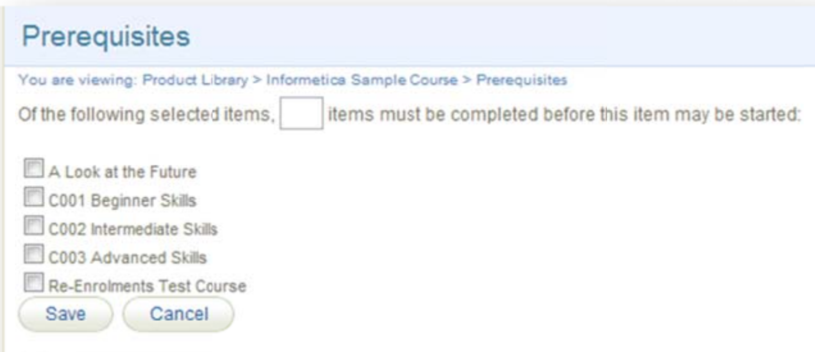
Available Completion Rules

Different completion rules will be available depending upon the setup of the product.

Rule	Description
Never complete	This default setting has no completion rule.
First time view	Choose to have the product considered complete the first time a participant opens it.
Timed view	Choose to have the product considered complete after a participant has spent the specified amount of time or longer with the item page open.
Selected items completed	Select the assets that need to be completed in order for the product to be considered complete. Note that the asset also needs to have a completion rule defined in order for it to be available for selection. Available for any products that have assets with completion rules defined.

14.1.13 Prerequisites at the Product Level

Prerequisites are other products that must be completed before this specific product can be started by a participant. Prerequisites can be set to restrict access to specific products until all prerequisites are met. Click prerequisites from the properties menu to add or edit a prerequisite for this product. Prerequisites can be set up by site managers, publishers and campus admins, however, only site managers can set up prerequisites for items among the same or different products; publishers and campus admins can set up prerequisites for items only within the same product.



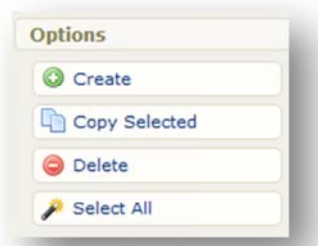
Completion rules must be set up prior to creating prerequisites

Enter how the number other products that need to be completed before this specific product can be accessed. Use the check box to select the products that need to be completed as prerequisites, and click the save button.

14.1.14 Delete Products

This option is available only to site managers.

Select the products you would like to permanently delete by clicking them and then click delete in the options menu on the right to open the product delete summary.



Deletion will remove any user history associated with it, such as completion and grades.

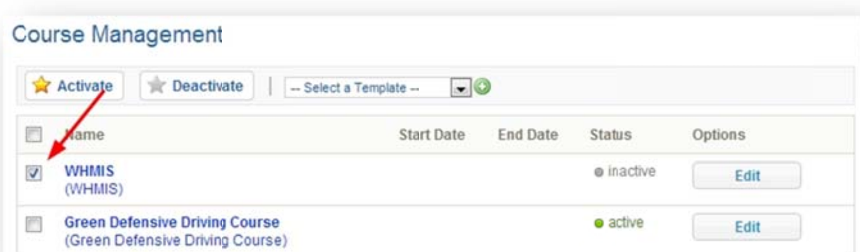
The product summary lets you view all of the products you selected and confirm their deletion. Select the delete product(s) button or cancel. After deleting or canceling, you will be brought back to the product library page.

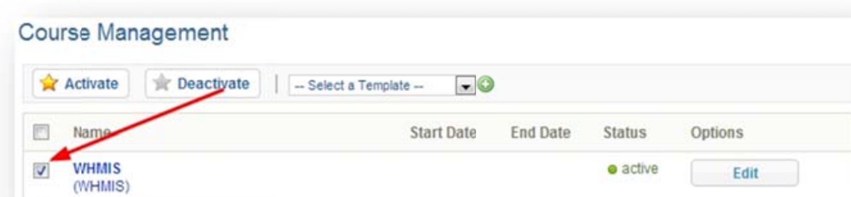
14.1.15 Activate or Deactivate a Product

Products must have an active status before campus admins and publishers can work with them.

Publishers and Campus Admins

When a campus admin or publisher creates a new product, it is inactive by default, so they must first check the box to the left of the product name, and then click the "Activate" button at the top of the list. Products that are inactive cannot be accessed by participants. Check the box to the left of the product name, and then click the "Deactivate" button at the top of the list.



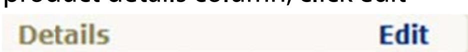


Site Managers

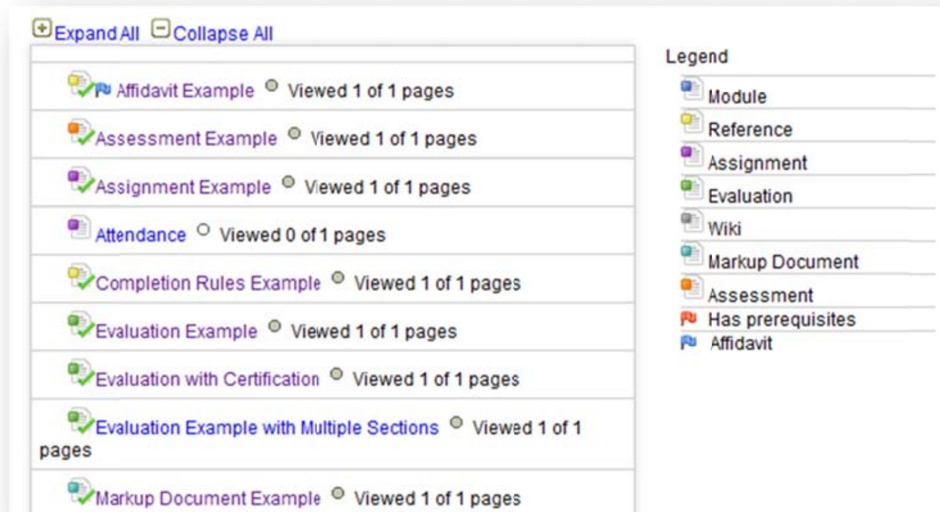
From the product library, use the status drop down menu next to any product to change the status to active, inactive, or master (necessary for publishers and campus admin to create new products).

14.1.16 Overview Page

The overview page displays all assets available within a product. It is accessible by participants, instructors, and publishers and shows the asset type, visibility, page views and prerequisites. If utilized, the overview page is accessible on the front end of Informetica. Open the product which you would like to show on the overview page. In the product details column, click edit



and then place a check next to show overview ☑. Click the save button. Below is an example of an overview within a product as it appears to participants.



14.2 Assets

Multiple content components can be incorporated into your content to suit your ideal learning needs. You can create the content by hand or upload compatible 3rd party content, such as SCORM files. Once a product is created, you can create and assign assets to the product. Assets are the individual elements that make up your entire product, each with unique features. Assets can be created by site managers, campus admins and publishers. Note that assets may be customized for your system and named differently than the default names listed in this manual.

A product must be active before you can open any of the assets within.

14.2.1 Types of Assets

Asset Type	Description
Questionnaire	A questionnaire is an informal way to evaluate something about your participant by posing content where there is no right or wrong answer. Questionnaires are often an objective way to measure things like abilities or aptitudes.
Assignment	An assignment is a resource that has a grade weight and due date attached to it so they are automatically removed from the product list when they are past due. Assignments are typically used to grade an element of the product that is done off line. For example, an instructor may issue a portion of the product grade to participants who email a video created for the product to the instructor.
Courseware	Courseware refers to a premade course that can be imported directly into Informetica and run as is. Courseware uses the standardized SCORM format that can be easily shared among different learning management systems.
Evaluation	An evaluation can automatically grade most participant answers and give a mark upon completion. Evaluations may be used to test knowledge of the content that you have provided, collect participant feedback about a product or an Instructor or as practice exercises. Evaluations support several different types of questions: essay, fill in the blank, matching, multiple answer, multiple choice, ranking and true or false. Informetica can automatically grade every type of question in an evaluation except for essays.
Markup Document	A markup document is an interactive review tool. A markup document allows participants and instructors to communicate issues or illustrate point about the document without changing the actual document in the product.
Module	A module is training content that typically contains the lesson portion of a product. Modules can be assigned a deadline, grade weights and even publishing dates to turn a lesson on or off. Modules can contain any of the supported file types, including videos.
Reference	References are assets are always available and often contain resources for participants such as external links, a relevant glossary of terms or can be used as a landing page for the product. Reference pages can even be linked to from other pages or set up as popup windows throughout the product to be used as in-product help tools.
Wiki	This is a collaborative resource which allows users to add and edit content collectively, directly on the asset itself.

Opening a product will reveal a list of the assets within it displayed on the left. Below are some icons you may see as you view assets and what they mean. Note that these flags are not visible from site manager view.

The orange flag indicates that the asset has prerequisites.

The blue flag indicates that the asset has an affidavit attached to it.

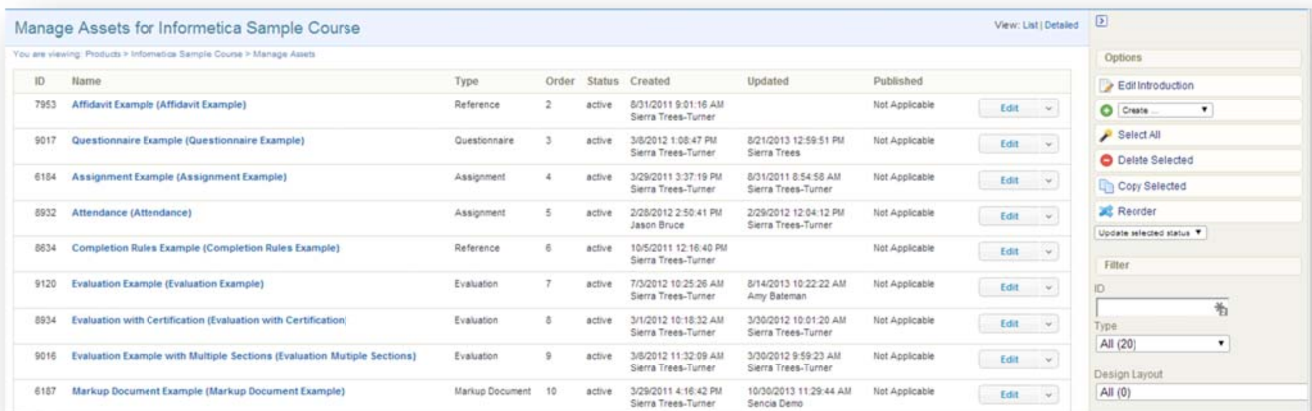
The grey flag indicates that the asset is hidden. This hidden status means that the assets they do not show up in the Overview or any other product navigation, but are available to participants during their progression through the product.

14.2.2 The Manage Assets Page

The manage assets page is where you can create, edit, copy, delete or reorder assets. You can also change the status of an asset from this page.

Site Manager View

To navigate to the manage assets page, open a product and click on the view all link or click a specific asset type. A list of all of the assets within the product is listed on the manage assets page. From the manage assets page, you can open an asset to edit it, create new assets, copy and delete selected assets and change their order of appearance. There are two ways to view assets: list view or detailed view.



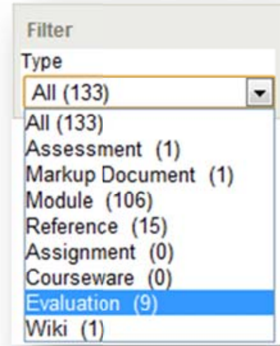
Campus Admin and Publisher View

To navigate to the manage assets page, select an active product and from detailed view click on the view link next to the assets column. A list of all of the assets within the product is listed on the manage assets page. Alternately you can open any product and then click (wrench tool) to open the manage assets page. From the manage assets page, you can open an asset to edit it, create new assets, copy and delete selected assets and change their order of appearance. There are two ways to view assets: list view or detailed view.

ID	Name	Type	Order	Status	Created	Updated	Published	
7953	Affidavit Example (Affidavit Example)	Reference	2	active	8/31/2011 9:01:16 AM Sierra Trees-Turner		Not Applicable	Edit
9017	Questionnaire Example (Questionnaire Example)	Questionnaire	3	active	3/8/2012 1:08:47 PM Sierra Trees-Turner	8/21/2013 12:59:51 PM Sierra Trees	Not Applicable	Edit
6184	Assignment Example (Assignment Example)	Assignment	4	active	3/29/2011 3:37:19 PM Sierra Trees-Turner	8/31/2011 8:54:58 AM Sierra Trees-Turner	Not Applicable	Edit
8932	Attendance (Attendance)	Assignment	5	active	2/28/2012 2:50:41 PM Jason Bruce	2/29/2012 12:04:12 PM Sierra Trees-Turner	Not Applicable	Edit
8634	Completion Rules Example (Completion Rules Example)	Reference	6	active	10/5/2011 12:16:40 PM Sierra Trees-Turner		Not Applicable	Edit
9120	Evaluation Example (Evaluation Example)	Evaluation	7	active	7/3/2012 10:25:26 AM Sierra Trees-Turner	8/14/2013 10:22:22 AM Amy Bateman	Not Applicable	Edit
8934	Evaluation with Certification (Evaluation with Certification)	Evaluation	8	active	3/1/2012 10:18:32 AM Sierra Trees-Turner	3/30/2012 10:01:20 AM Sierra Trees-Turner	Not Applicable	Edit

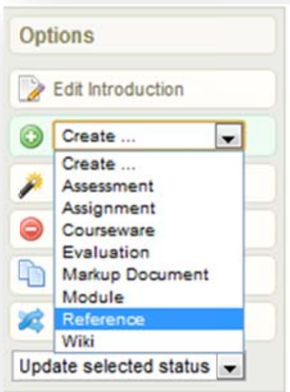
14.2.3 Filtering Assets

To view only specific asset types (for example all evaluations within a product), you can filter the assets to show only the types you want, by selecting from the drop down list in the left side menu.



14.2.4 Create an Asset

To create a new asset, return to the manage assets page then on the left side menu, click the drop down arrow next to Create and select the type of asset from the dropdown menu. To edit these details, click on edit next to the details column on the right. Enter the details and then save. You will then be brought to the specific create page for that asset. Details for creating specific assets are covered elsewhere in this manual.



Adding an asset page title is important because they show up in lists where assets must be selected. For example, if you are setting up a product's completion rule, the list of assets available will be listed by their page titles. If an asset does not have a page title, then it cannot be selected.

14.2.5 Edit Assets

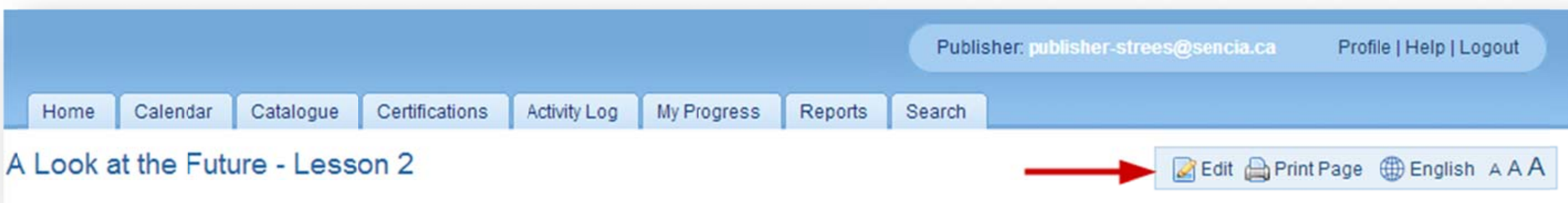
You can make any changes you like to an asset page, with the exception of a test already in progress. You can also make changes to the choices made during initial creation, such as the title of the asset, by clicking the edit link from the details column. See the introduction chapter for more information on the publishing window or visit the end of this manual for a guide to the publishing window tools.

From the manage assets page open the asset you wish to edit by clicking the name of the asset o by clicking the edit button to the right of any asset name, make changes within the publishing window, and then click save.

View and Edit Modes

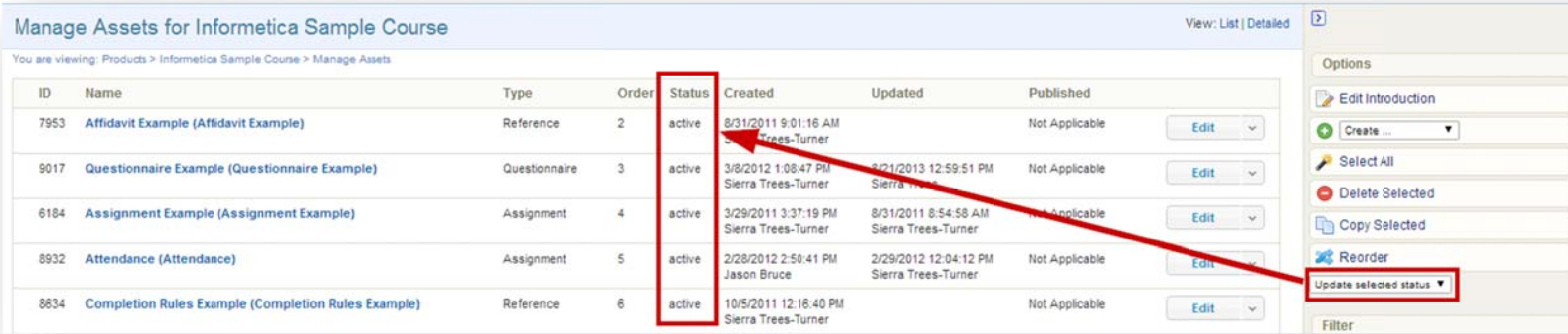
This option is available only to campus admins and publishers.

You can toggle between edit and view modes as needed. Click the "edit" button at the top of the page to enter edit mode. You will see that the edit button at the top of the page now says "view". You will also have access to the product's details at the top left of the page. Click the "edit" link next to details in the left menu to edit the product settings. When editing an asset, you will see a "view" button at the top right of the page. Click this to view the page without the menus on the left. When you are in view mode, the button will change to read "edit". Don't forget to save your changes.

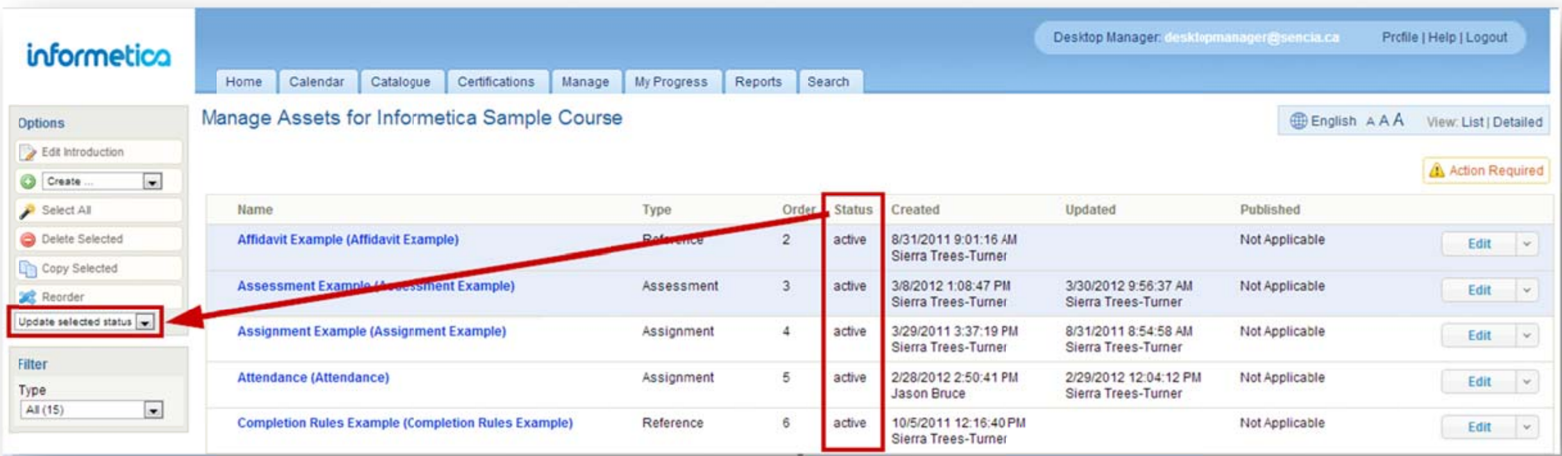


14.2.6 Asset Statuses

Site Manger View



Campus Admin and Publisher View



To change the status of an asset, navigate to the manage assets page. From here you can change the status of one or several assets by selecting them and then using the drop down menu on the right side called change selected status. Here is a description of the different statuses:

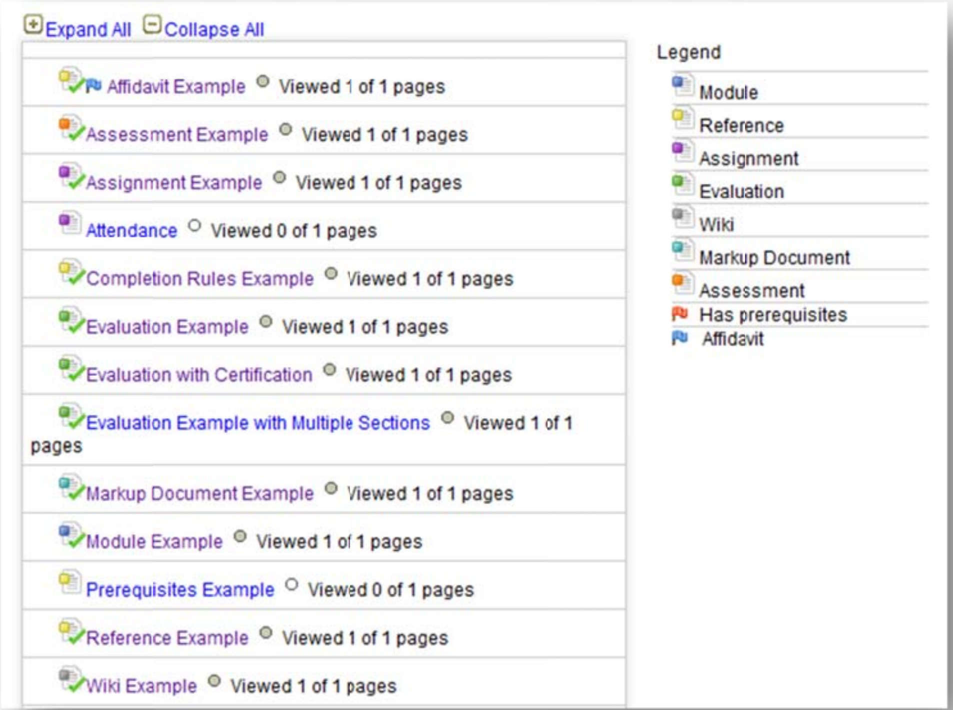
Active – An active status means that the asset is available to be accessed by anyone registered to an active course.

Inactive – If an asset is inactive, only user types with editing capabilities who have the course assigned to them, such as publishers, would be able to see the asset. You can report on inactive assets, view them on user records and transcripts, and associated certifications remain intact. Note that new certification rules pull only from active assets, so you would need to make it active if you need to apply it to a certification.

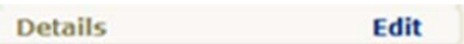
Archived – An archived asset has no functional difference from an inactive status. It simply allows admins to flag an asset item in different ways, offering a more descriptive meaning for users. Archived assets are typically items that will not be reactivated.

Hidden – A hidden asset does not appear on any menus, the overview page or navigation tools but can keep the content itself available to particpants. A way for participants to navigate to the hidden asset would be required. For example, hidden status used in conjunction with a next button within a course that progresses among the assets linearly, can force particpants to view the hidden page.

Popup – A popup does not appear on any menus, the overview page or navigation tools but can keep the content itself available to particpants. Popups must be linked to a word or item within the product so that participants can view the asset. Popups can be used for participants to click for more information about something within a product without leaving the content they are viewing. Glossary words are a good example. A popup link looks like any other link on your pages and stays on the screen until the user closes the popup window.



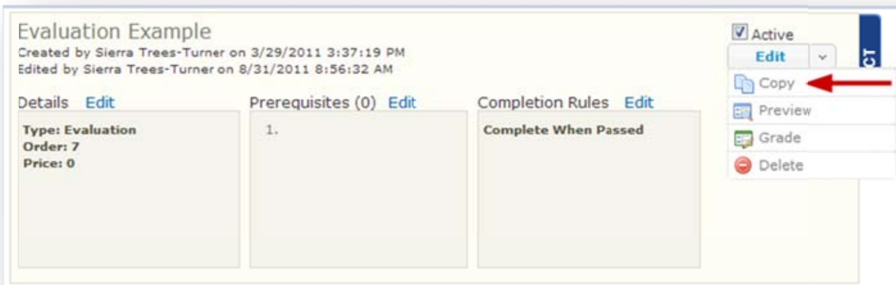
Overview Only – This status means that the asset will not show up for participants in any menus, but will appear only in the overview if that option is activated for the product. Overview is like an interactive map of the course that shows the asset types, visibility, page views and prerequisites. The names of the assets are also links, so clicking the name will take the user directly to that asset in the course. If utilized, the overview page is available as a menu item on the front end of Informetica. To activate the overview, open the product which you would like to show on the overview page. In the product details column, click edit

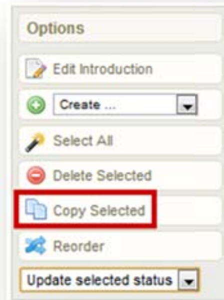


and then place a check next to show overview . Click the save button.

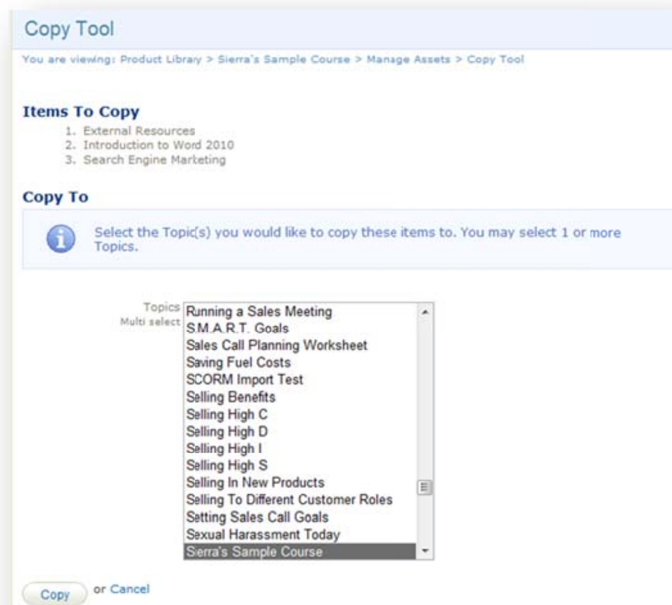
14.2.7 Copy Assets

From the manage assets page, you can press the down arrow next to the Edit button of any asset, and then click copy. Alternatively, if you have several assets to copy at once, then you can select several from list view and click on the copy selected link from the options menu. This will open the copy tool page.





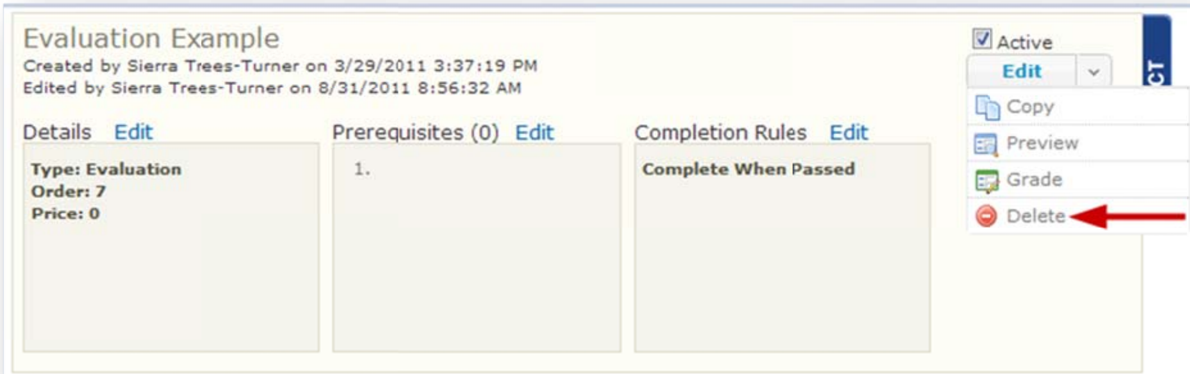
On the copy tool page, select the products that you would like to copy the asset to (you can also copy to the same product you are currently in), and then click the copy button. Hold down the CTRL key to select multiple products. After copying, you will be returned to the manage assets page.



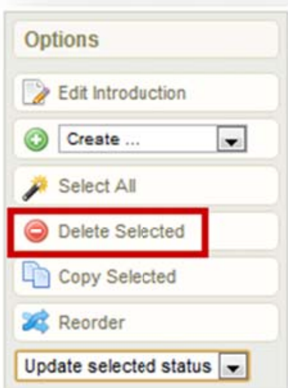
Copied assets will not remain nested when they are copied to the new destination. For more information on nesting, visit the Reorder and Nested sections of this chapter.

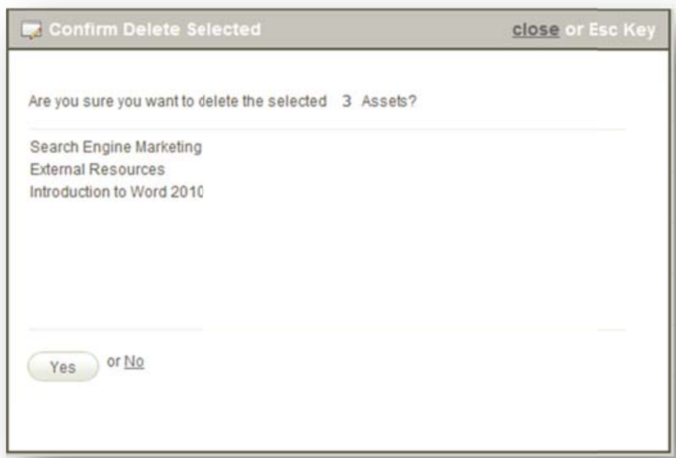
14.2.8 Delete Assets

From the manage assets page, you can press the down arrow next to the edit button of any asset, and then click delete. Alternatively, if you have several assets to delete at once, then you can select them from list view and click on the delete selected link from the options menu on the right. Either option will open a confirm delete selected popup window that will show you a list of the assets you have selected and ask you to confirm that you want to delete them. Click yes and you will be returned to the manage assets page.



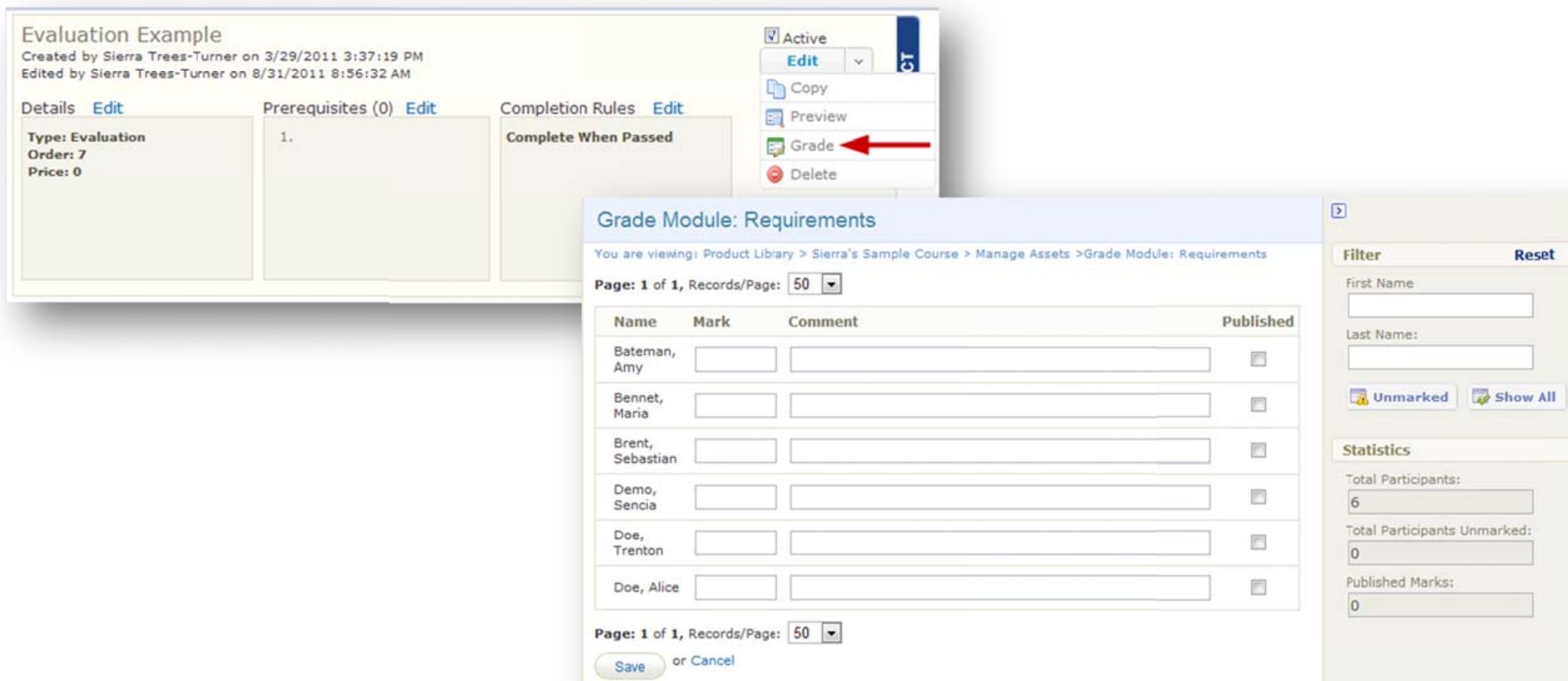
Deletion is permanent and will remove any user history associated with it, such as completion and grades.



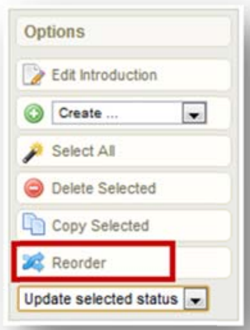


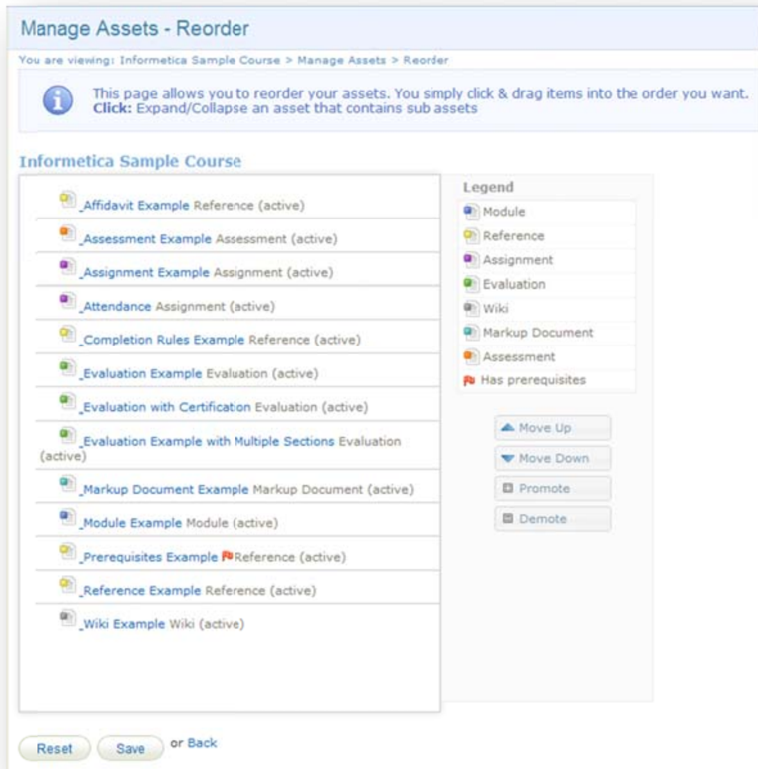
14.2.9 Grade Assets

From the manage assets page, you can manually grade any assets that have a grading option (such as modules, assignments and essay questions in evaluations). Click on the grade button within the asset's information box to open the grade screen where you can add a mark for individual participants, add comments and publish the grade so it will be displayed on the participant's transcript. The example below is the grade screen from a module asset type, but each type will have a unique screen. You can use the filter on the right to see only participants who have not been graded yet or to enter a specific name. The grade button will only be visible on eligible assets. Click the save button to ensure that any grades you entered are updated.



14.2.11 Reorder Assets

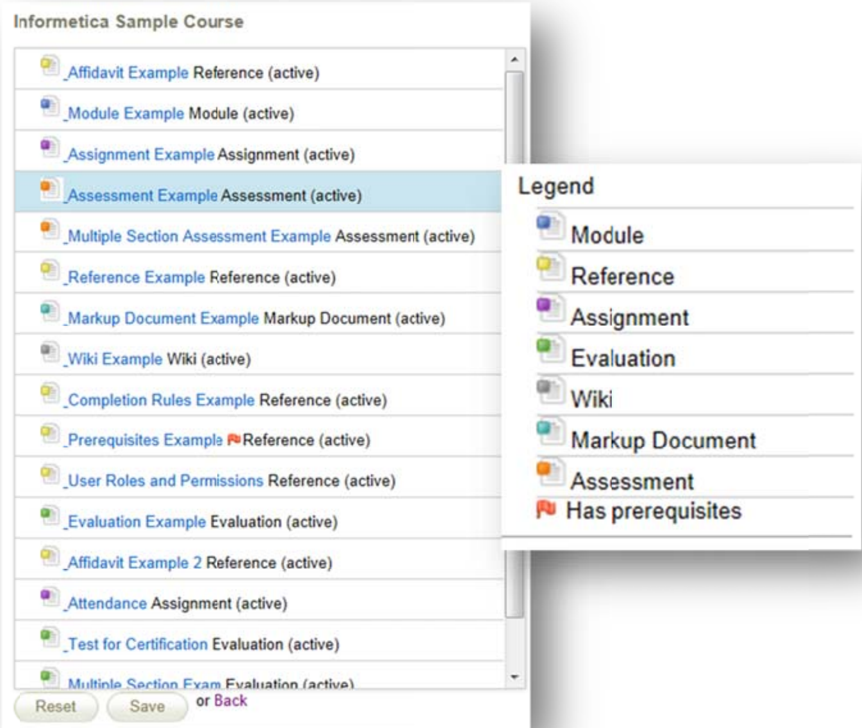




From the manage assets page, you can reorder the way in which assets are presented to participants. Click on the reorder link from the options menu to open the reorder page. Click the asset that you would like to move and drag it with your mouse, releasing the mouse button to drop the asset to a new position. Alternately, you can select the asset and move it using the move up or move down buttons.

Click save to keep your changes or select back to cancel the changes and return to the manage assets page. You can also use the reset button before you save to remove the moves you made and start over. After saving, you will be returned to the manage assets page.

The legend link on the right in the options menu will open a page to view a list of asset types and their corresponding icons both in the admin view and on the desktop. Here are some icons you may see as you reorder assets and what they mean:



The green check mark indicates that the asset can be moved to new location.

The red X indicates that an asset cannot be moved to new location.

The orange flag indicates that the asset has prerequisites. You can right click on any asset from the reorder page to view the prerequisites.

The blue flag indicates that the asset has an affidavit attached to it. You can right click on any asset from the reorder page to view the affidavit.

The green line with a small arrow in front of it indicates that the asset stays as a top level item in a new location.

The green plus symbol indicates that the asset will become a sub-asset in a new location. This means that the asset will be nested within another asset.

Module The + symbol indicates that there are nested assets. Double click the + to expand the list and show all assets.

Module The - symbol shows when nested assets are expanded. Double click the - to collapse this list a show only the top asset.

Nested Assets

Nesting an asset allows a course author to hide the asset from the user's menu without giving it a hidden status. Nested assets do not appear in the list of the assets in the menu of a product for desktop users. Instead, the asset can be seen and navigated to from the overview page. Nesting is basically a sorting option within the product that does not affect the order in which a user will view the assets.

Overview must first be activated for the product. Overview lets users know which pages they have visited and allows them to collapse or expand the view.

Nesting is used by clients as a way to keep a participant's asset menu tidy. For example, if you had 75 assets and 25 of them were related to Criminal Offense, 25 to Summary Offenses, and 25 to Criminal Procedure you could nest those so that the user does not need to use a scroll bar to see an overwhelming 75 items in the menu, but instead sees only the 3 main assets.

The examples below depict an overview page, with a parent asset that has three nested child assets. Users taking this a course would see the parent, CRIMINAL OFFENSE, on the menu of the course's assets, but would not see the three child assets. Users would still be able to navigate to the child assets by using either a dynamic next or previous button inserted into the asset content by the course author, or from the overview page as seen above by clicking the name.

Example with nested assets

Example without nested assets

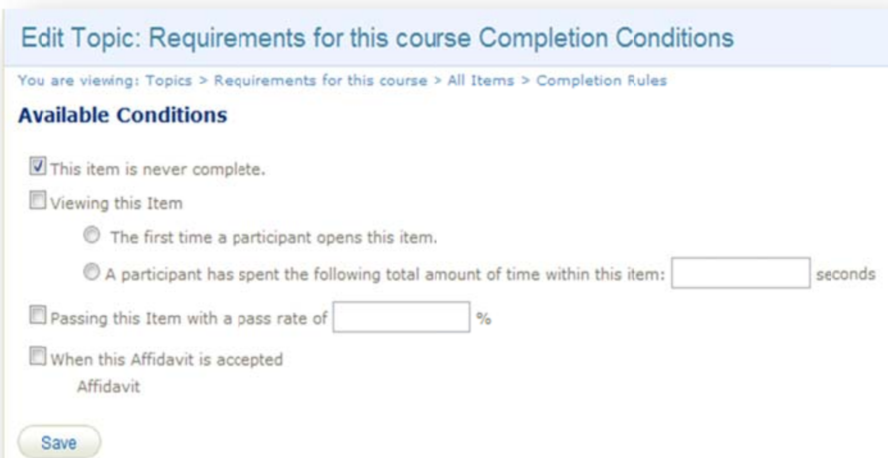
Example of collapsed and expanded assets

Nested assets should only be used if you are using the Overview page or have dynamic Next and Previous buttons on the asset pages. This way an assest is not accidentally marooned, making it impossible for users to navigate to it.

14.2.12 Completion Rules at the Asset Level

Completion rules are conditions that must be satisfied by a participant before an asset is considered completed. Setting up completion rules is optional and by default all assets are set up as never complete. Open the asset you wish to add completion rules to and then click completion rules under the properties menu from the manage assets page. Alternatively, from the manage assets page in detailed view, click edit next to the completion rules column in the information box for the asset that you wish to create rules for.

Select one of the completion rules from the available conditions offered and then click "save" to return to the manage assets page. Click the save button to be returned to the *manage* assets page.



Completion rules must be set up prior to creating prerequisites.

Available Completion Rules

Different completion rules will be available depending upon the setup and type of asset.

Rule	Description
Never complete	This default setting has no completion rule.
First time view	Choose to have the asset considered complete the first time a participant opens it.
Timed view	Choose to have the asset considered complete after a participant has spent the specified amount of time or longer with the item page open.
Passing This Item	Select this condition to accept the asset as complete when a passing grade has been assigned. Note that some assets, (particularly SCORM files) may not be designed to announce completion. Available only for automatically graded assets, i.e. modules, evaluations, and SCORM assets.
Pass Rate	Select "passing this item with a pass rate of" requires you to enter a percentage that the participant must achieve for this asset to be considered complete. This is only available for evaluation assets.
Affidavit Acceptance	Select "when the affidavit is accepted" to consider this asset as complete once the affidavit is accepted. Available for reference, module, and assignment assets.

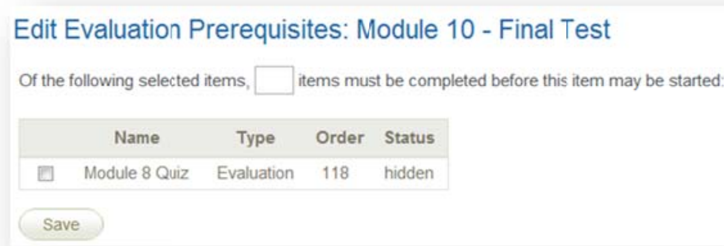
Completion Options for Each Asset Type

Asset Type	Never Complete (Default)	First Time View	Timed View	Passing This Item	Pass Rate	Affidavit Acceptance
Reference	Y	Y	Y	N	N	Y
Module	Y	Y	Y	Y	Y	Y
Assignment	Y	Y	Y	N	N	Y
Questionnaire	Y	Y	Y	N	N	n/a
Evaluation/Prova	Y	N	N	Y	Y	n/a
Mark Up Document	Y	Y	Y	N	N	n/a
Wiki	Y	Y	Y	N	N	n/a
SCORM	Y	Y	Y	Y	N	n/a

Not all asset types have every completion rule available.

14.2.13 Prerequisites

Prerequisites are other assets that must be completed within the same product before a specific asset can be started by a participant. Prerequisites can be set to restrict access to specific assets until all prerequisites are met. From the manage assets page, click the edit link next to the prerequisites column under the asset you wish to create prerequisites for. Prerequisites can be set up by site managers, publishers and campus admins, however, only site managers can set up prerequisites for items among the same or different products; publishers and campus admins can set up prerequisites for items only within the same product.



Enter how many of the other assets need to be completed before the asset you are creating prerequisites for can be started. Use the check box to select the assets that need to be completed as prerequisites and click the save button. After saving, you will be given a confirmation and a link will be provided to return to the manage asset page. An orange flag next to the prerequisites Prerequisites means that there are prerequisites set up for this asset.

In participant view, items with prerequisites are shown in red. In this example, the participant is taking a course called Influenza Vaccine where each module needs to be viewed in order. They cannot access the module "What Do I Have to do?" until they have completed "Why Volunteer".

Completion rules must be set up prior to creating prerequisites.

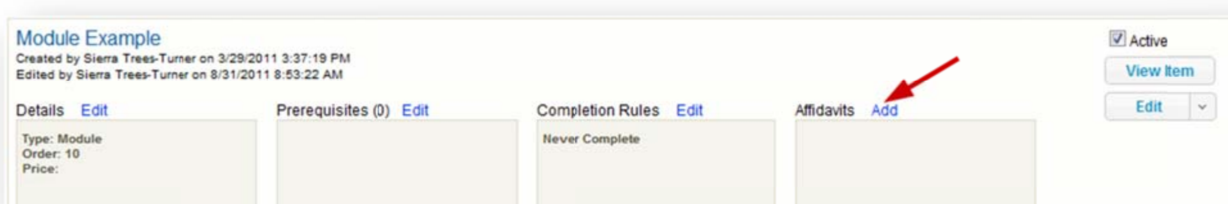
14.2.14 Affidavits

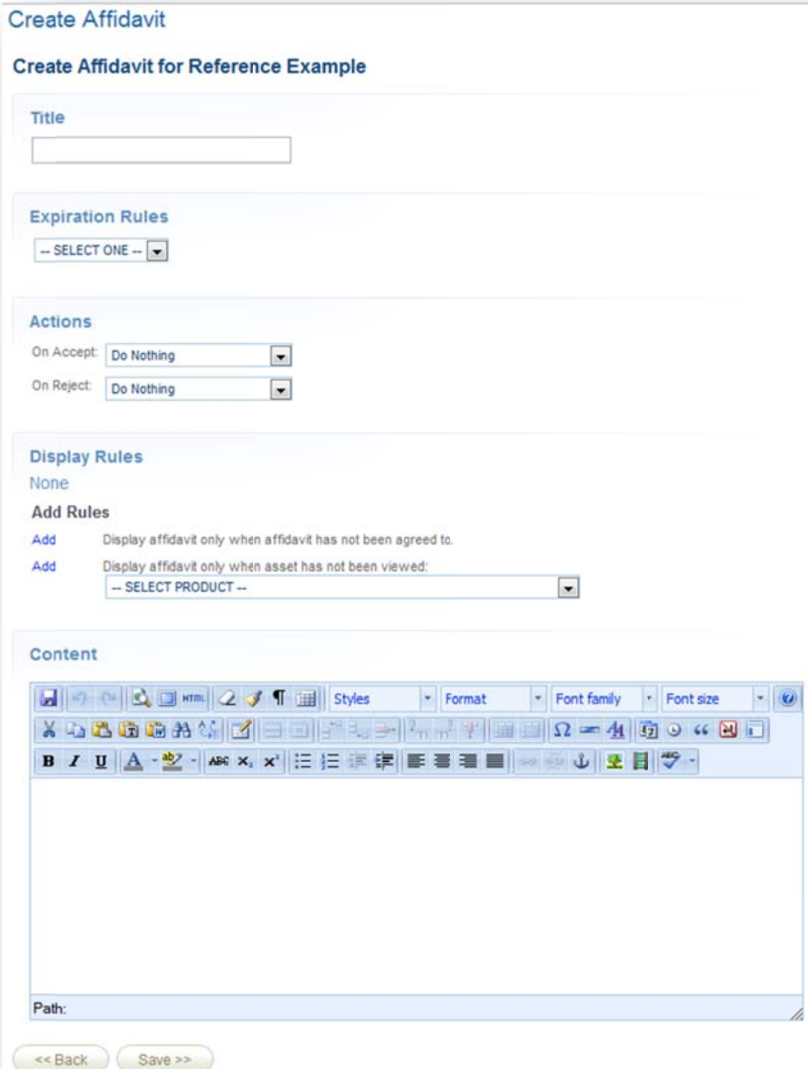
An affidavit is a formal statement that a user must agree to or read before beginning a course. To create an affidavit, you will need to associate it with a specific asset. If the affidavit is for the entire product and not just the one asset, then it should be attached to the first asset in the product. You can even create a new empty asset specifically for the affidavit alone. Assets can be created for three different asset types: references, modules and assignments. Consider whether the asset you select will need features such as grade weights, deadlines or publishing dates, as each asset type has unique features.

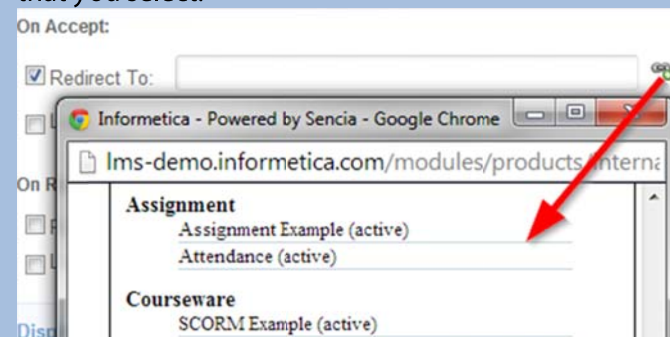
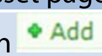
If you do not have grade or date considerations, then a Reference is the preferred Asset to use. If you do have grade or date considerations, then a Module is one of the preferred asset types to use.

Create an Affidavit

View the manage assets page in detailed view and then click add next to the affidavits column under the asset you wish to an affidavit within. If there is already an affidavit set up for this asset, the button will be en edit button instead and you can make changes to the affidavit that is already set up or delete it entirely. Alternatively, you can open an existing asset one from the manage assets by clicking the name and then select the create affidavit link from the properties menu on the left. If there is already an affidavit set up for this asset, the link will instead be view affidavit and you can make changes to the affidavit that is already set up or remove it entirely. This will bring you to the create affidavit page.



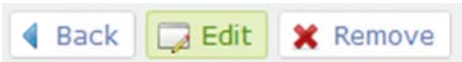


Field	Description
Title	Enter a name for the affidavit.
Expiration Rules	Select the expiration rules from the drop down menu (Immediately, number of days or never expire).
Actions	Select from the drop down menus (on accept and on reject) to direct where participants will be taken after then accept or reject the affidavit: • Do nothing. • Redirect to: Will redirect the participant to the asset that you select.  • Lock the following asset: Select an asset from the drop down list and the participant will no longer have access to that asset page.
Display Rules	Press the add button  to select one of the premade rules. You can add as many rules as you need. • Display affidavit only when affidavit has not been agreed to • Display affidavit only when asset has not been viewed: Select a product from the drop down menu and then the corresponding asset. Create a new rule if you have more than one asset that must be viewed.
Content	Design the affidavit text and content using the publishing window.
Save	Click the save button. After saving, you will be returned to the asset's publishing window.

Edit an Affidavit

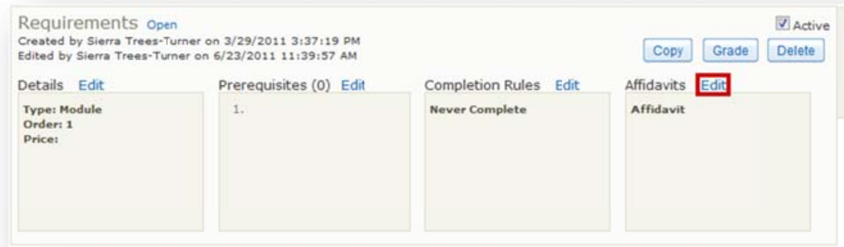
From the manage assets page, click edit next to the affidavits column under the asset you wish to an affidavit within.

Click the back button to cancel and return to the publishing window.



Click the edit button to open the affidavit details and make changes to the affidavit.

Click the remove button to delete this affidavit completely.



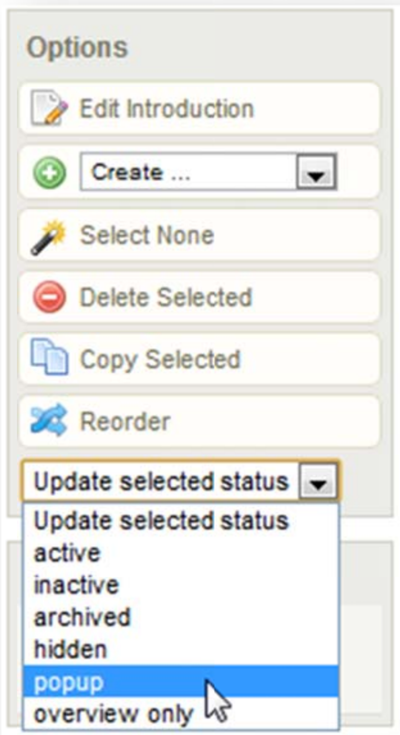
The affidavit history is a change log that shows a record of any prior versions of this affidavit, if applicable.

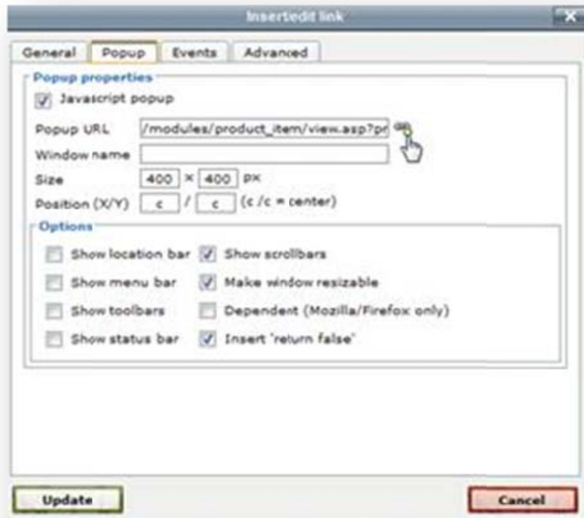
Title – Shows the name of the affidavit, including any former titles it has had.
Created by – Lists the name of the manager who created the update.
Days to Expire – Indicates how many days the affidavit is valid before needing to be accepted again, if applicable.
Content – Shows the content text from any prior version of the affidavit.

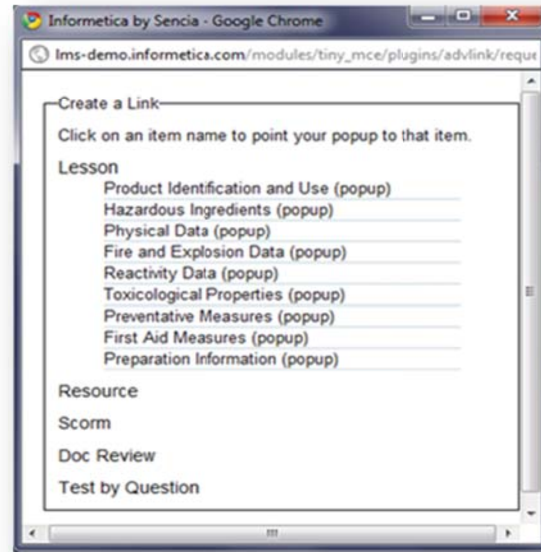
Editing an affidavit will require everyone who has already accepted the affidavit prior to the changes to re-accept the updated affidavit if they visit the asset.

14.2.15 Creating a Popup Window

After you have created an asset and changed the asset type to popup, you can link to it from another area of your product. Popups can be used for participants to click for more information about something within a product without leaving the content they are viewing. Glossary words are a good example. A popup link looks like any other link on your pages and stays on the screen until the user closes the popup window. Reference assets are especially good for creating popups.







Within any asset, select the text you would like to link to a popup by using the link tool in the content window. Select the popup tab and make any changes you wish to the popup properties and options. Click the add link icon and scroll down the list until you find the asset that you want to link to. Click on the item name to point your popup to that item and then click the insert button.

14.3 Publishing Dates vs Expiry vs Inactive vs Deletion

There are four ways to globally remove products and assets from users enrolled to the products without actually deleting the products or assets. Below are the characteristics of each so you can pick the best methods for your needs. Note that the methods are not mutually exclusive.

	Publishing Dates	Expiry	Inactive	Deletion
Characteristic	A product or asset made available during specific publishing dates cannot be accessed by any enrolled participants outside of those dates. Publishing dates affect all enrolled users simultaneously.	Expiry determines the duration in days that a participant has access to the product after being enrolled. Expired products cannot be accessed and affect enrolled users individually.	Products and assets that are inactive cannot be accessed by any enrolled participants. An inactive status affects all enrolled users simultaneously.	Deleted products and assets are removed completely from the system and are no longer available to any users.
Affects Products or Assets?	Product and/or assets	Products only	Products and/or assets	Products and/or assets
Considerations	Products/assets with publishing dates will appear on enrolled user records, even if they never launched the item. This could cause skewed results for managers auditing results.	If the product needs to be re-attempted, consider using the supplemental training tool to notify users of an upcoming expiry without locking them out of the product.	New certifications can only be created from active products/assets. You may need to temporarily activate items to apply them to certifications.	The system will prevent you from deleting a product or asset that is associated to a certification.
Record Retention	Available on • Reports (report dates must fall within publishing dates) • User records • User transcripts • Associated certifications	Available on • Reports • User records • User transcripts • Associated certifications	Available on • Reports • User records • User transcripts • Associated certifications	Records are completely removed from: • Reports • User records • User transcripts • Associated certifications are broken

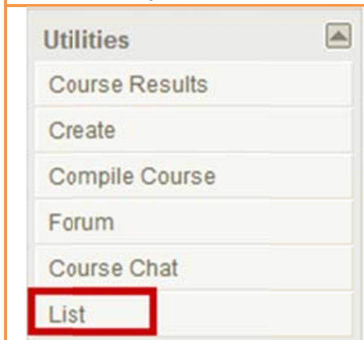
14.4 Exceptions (Extensions)

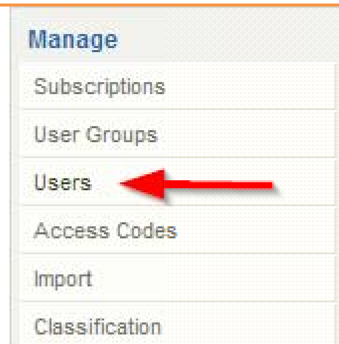
This option is available to site managers, campus admins, campus managers, publishers, and instructors

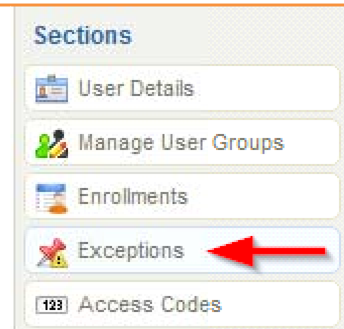
Exceptions give additional access to a product or an asset within a product, such as a test. You can extend the number of days a user has access to a product or asset with an expiry, or change give them an additional attempt. You can also opt to send the user an email about the exception.

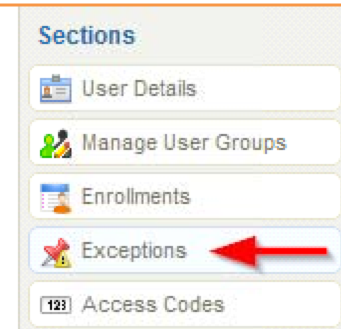
Navigation Paths to Exceptions

Publishers & Instructors	Campus Admins & Campus Managers	Site Managers
Open any course, select **List** from the Utilities menu, click the user's name, and then select either Product or Asset Exceptions.	From the **Manage** tab, select **Users**, open any user profile, and then select **Exceptions**.	Select **Users > Accounts**, open any user to access the profile page, and then then select **Exceptions** from the Sections menu.







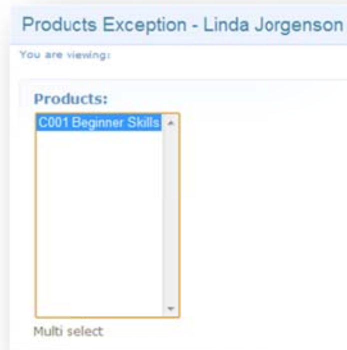


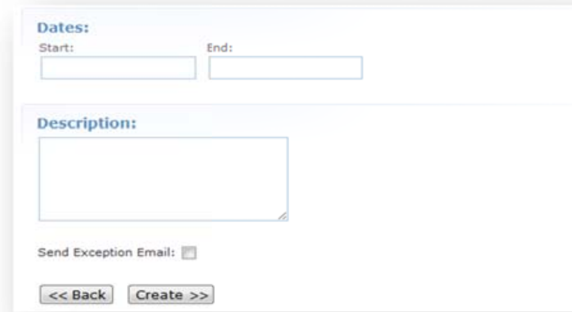
14.4.1 Extend a User's Access Date

Grant a user access to a product or asset past the expiry.

For Products

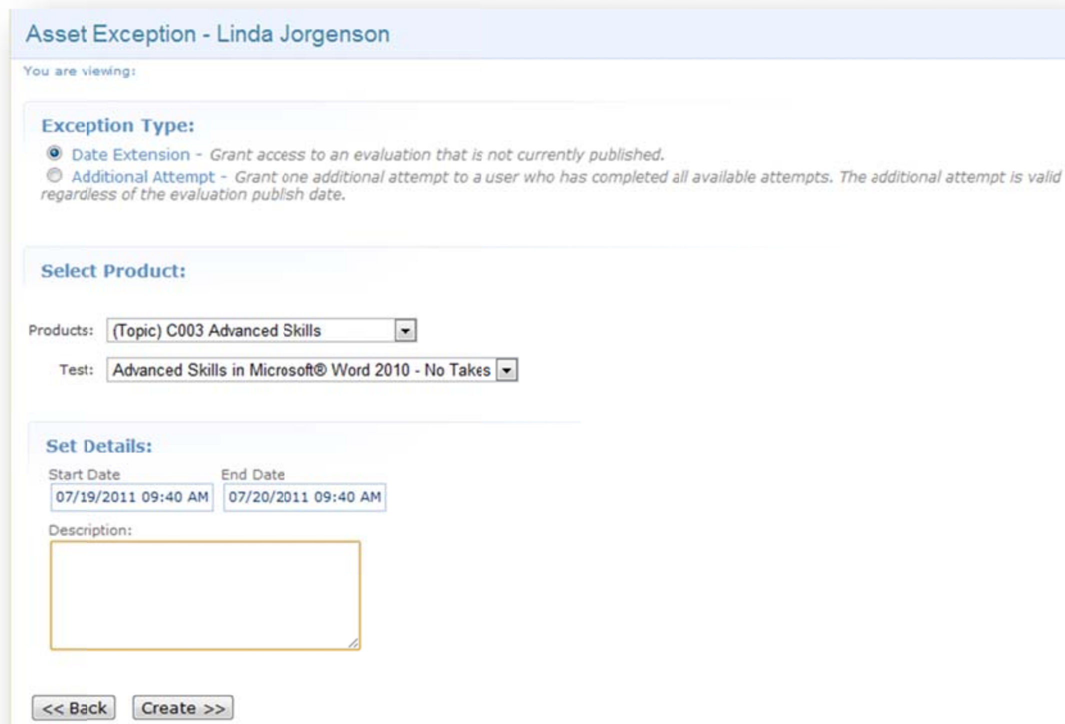
1. Select **Create** under product exceptions
   Publishers and Instructors must select **Product Exceptions** first.
2. Select the relevant **Products**
3. Enter the new **Start** and **End** dates
4. Add an optional description for the exception
5. Send an optional automated email notification to the participant by checking the box at the bottom **Send Exception Email**
6. **Create** to complete the creation





For Assets

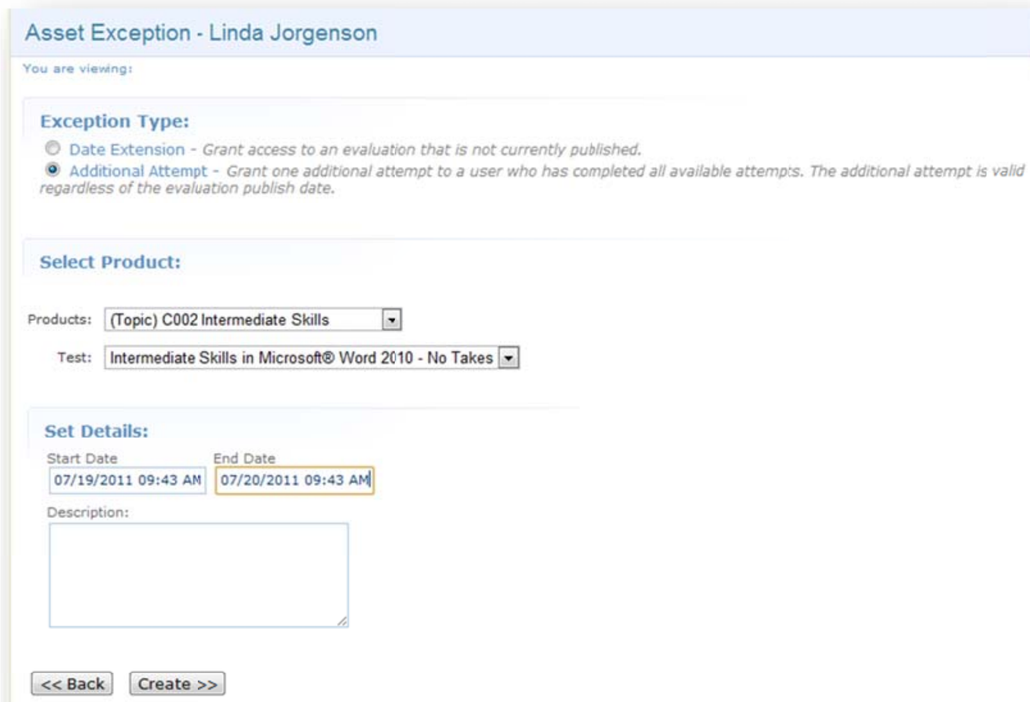
1. Select **Create** under **Asset Exception**
   Publishers and Instructors must select **Asset Exceptions** first.
2. Select **Date Extension** under the exception type
3. Select the relevant **Product** and **Asset**
4. Set the new **Start** and **End** dates
5. Add an optional description for the exception
6. **Create** to complete the creation



14.4.2 Grant an Additional Attempt

Grant an additional attempt to an evaluation beyond the standard limited attempts allowed to the user. This will grant one additional attempt to a user who has completed all available attempts. The additional attempt is valid regardless if the asset has published dates entered, even though the dates are required to be entered. Exceptions (extensions) created for evaluations with a pass/fail calculation of by individual section and allowing only 1 retake will allow participants to retake only failed sections.

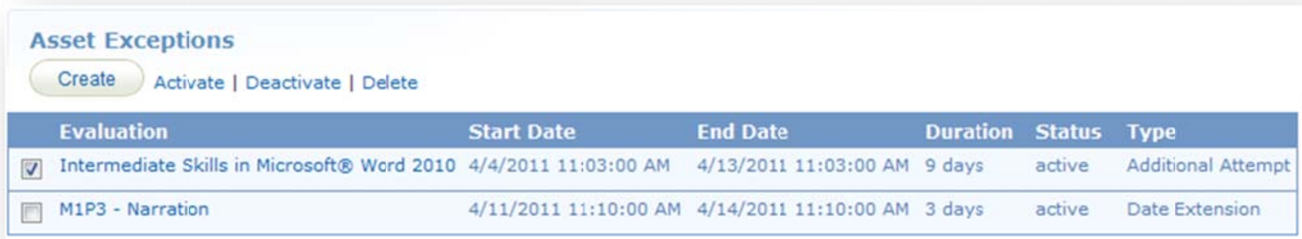
1. Select **Create** under asset exceptions
   Publishers and Instructors must select **Product Exceptions** or **Asset Exceptions** first.
2. Select **Additional Attempt** under exception type
3. Select the relevant **Product** and **Asset**
4. Set the new **Start** and **End** dates
5. Add an optional description for the
6. **Create** to complete the creation



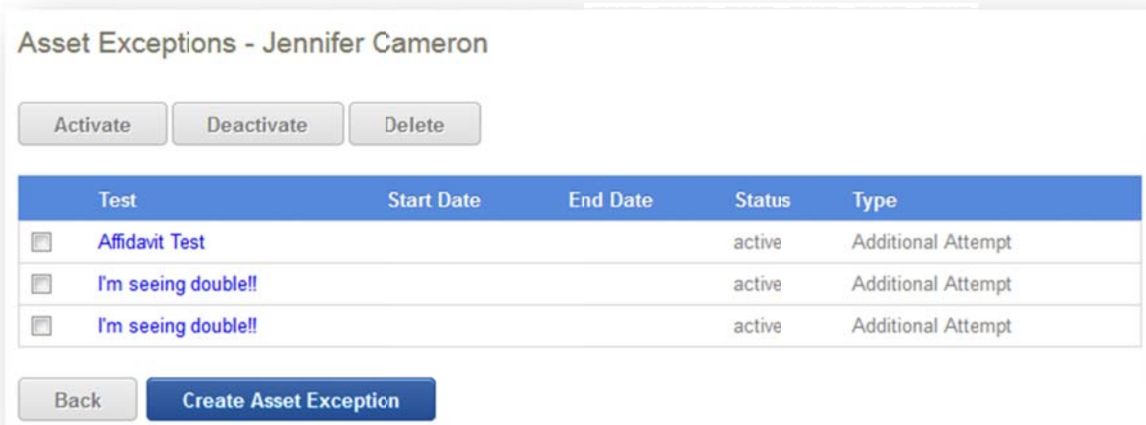
14.4.3 Activate, Deactivate or Delete Exceptions

To activate, deactivate, or delete exceptions, select the exceptions link under asset exceptions or product exceptions that you wish to adjust. Select the box before the name of the exception you wish to change and then select **Activate**, **Deactivate**, or **Delete** from the top.

Site manager, campus admin, and campus manager view:



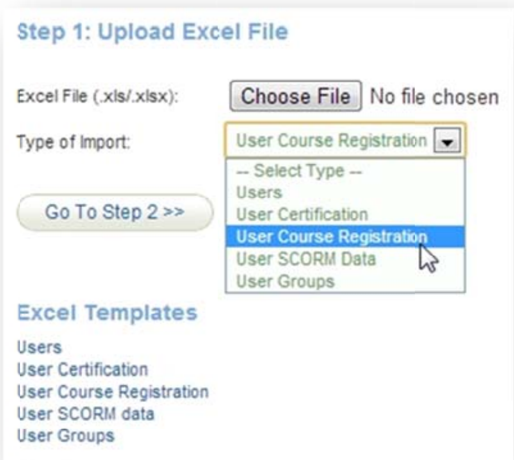
Publisher and instructor view:

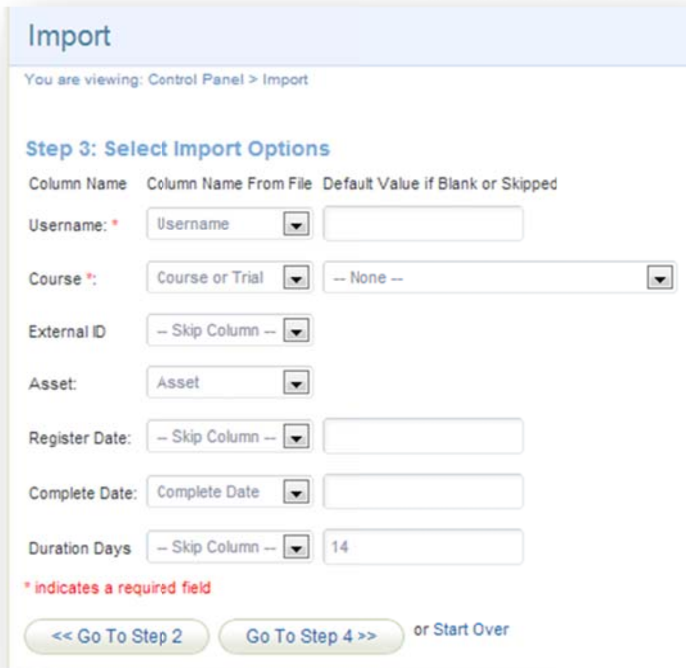


14.4.4 Grant Multiple Exceptions at Once

Informetica's import tool can be used to upload exceptions to multiple users at one time using the User Course Registration option and changing the Duration Days. For detailed instructions on using the import tool, please visit the Importing Data chapter of this manual. In step three, when you match the information on the Excel file with the appropriate information that you want to import into Informetica, use the duration field from your Excel sheet to import multiple different durations, or enter the number of days into the blank duration field in the import tool. In the example below, everyone on the import sheet will be given an additional 14 days access to the courses and assets listed on the imported Excel file.

The types of imports available vary by system, so your options may differ from those pictured.





14.5 Key Points When Working with Products and Assets

Here are some key points to remember, when working with products and assets.

1 • A site manager must assign products to publishers and campus admin s before those user types can access them.

2 • A site manager must ensure that master products are available for publishers and campus admins before they can create new products.

3 • Products must be activated before participants will see them.

4 • To edit a product’s details, click on the name of the product and then click edit from the details menu.

5 • To edit an asset within a product, click the name of the asset from the manage assets page.

6 • You must always click the save button at the bottom of a page to save your changes.

7 • Completion rules must be set up before prerequisites can be assigned.

8 • Once you have edited or created a product, or any asset within a product, you should review it, to make sure it appears as expected.

9 • Log in as a participant or publisher and click on the product title in the left side menu.

10 • Navigate through the asset pages and launch quizzes, etc. to make that sure they appear as expected.

14.6 Revising Products & Assets

There are several ways to make major revisions to your products and assets. The description of each technique below can help you determine which method will work best for your needs. These methods are generally intended to be used for major revisions, such as a new version of a course or an updated exam with a certification.

14.6.1 Create a new product and deactivate the old product

You can create an entirely new product or make a copy of an existing one. In this way, the old product will be retained in the LMS for purposes of auditing or revision reference.

Considerations when employing this method

- Existing users who need access to the new product may need to be reregistered to the project, depending upon your system set up.
- When you deactivate the old product, any certification associated with it can no longer be obtained; a new certification will need to be created for the new product.
- A new certification can be built to include completing either the old product or the new product. In this way, any new certification can be applied to qualified users who took the old version, if applicable. This can be set up a site manager.
- Any links directing to the old asset will need to be redirected.

14.6.2 Create a new asset and deactivate the old asset within the same product

You can create (or copy) an entirely new asset within the same product as the existing one. In this way, the old asset will be retained in the LMS for purposes of auditing or revision reference. You could give the product a slightly new name so that users will know that it has been updated, for example: “Course ABC, 2012 Version”.

Considerations when employing this method

- Users who are already registered to the product will have access to the new asset; if registered users need to take the new asset, then they will need to be informed.
- When you deactivate the old asset, any certification associated with it can no longer be obtained; a new certification will need to be created for the new asset.
- A new certification can be built to include completing either the old asset or the new asset. In this way, any new certification can be applied to qualified users who took the old version, if applicable. This can be set up by a site manager.
- Any links directing to the old asset will need to be redirected.
- You can create a new certification to include both versions of the SCORM if desired. You can use this solution to re-certify users who took the old version, if desired.

14.6.3 Replace or overwrite your old SCORM file with a new version

When replacing or overwriting a SCORM file, it is best practice to do this only when the updated version will be accessed by new registrations and you do not require users who have already taken the SCORM it or are currently in progress to take it again.

> ***A Word of Caution:*** *Choosing to overwrite a SCORM package can result in detrimental effects. Carefully weigh all considerations before overwriting the file. Sencia cannot be responsible if the SCORM no longer works properly or users in progress have unexpected results.*

Considerations when employing this method

- Users who have already taken this SCORM or who are currently in progress may be affected; they may see the old SCORM content and the book marking feature may direct them to an old file that no longer exists. We recommend that you thoroughly test before making this change available to see how it affects your users.
- When overwriting, the new SCORM will save itself over the old file, so there will be no copy of the old version of the file in the LMS.
- The system will not differentiate between the old version and the new version.
- You will not need to set up any new associated certifications.
- Any links directing to the SCORM asset will remain valid.
- Your users may not be able to take the SCORM asset again, since they already completed the old version. This depends on how your SCORM file is programmed / authored.
- Only the most recent scores for this asset are available in the LMS.
- If you require everyone to take the new asset, they will already have scores recorded for the old SCORM.
- If there is an associated certification, then users who completed the old version will have a certification, even if they do not take the new version.
- When you run reports, you will not be able to see compare the two versions; you will not be able to easily monitor which users have completed the new version.
- You will not know which version users are certified for.

15. Media Library

Informetica gives you online access to course materials stored in a repository that holds all of your documents, images, multimedia files, and more.

Topics Covered in this Chapter:

Media libraries are where all media files are stored in Informetica. There are two libraries in use. The global library is reserved for the site manager and allows content to be accessible in all applicable content publishing windows within the Informetica system. The local library houses files within specific products and are only assessable to administrative user types who have access to those products, such as a publisher or campus admin. The navigation to each library is different and will be explained below.

15.1 Supported File Types

Informetica supports most popular file types. Here is a chart that shows which files are natively supported and what icons represent the files in the media library. Informetica sorts files into several categories: audio /video, documents, flash, images, and templates so that they can be sorted by file type. Here is a list of file types that can be uploaded, accessed and utilized within Informetica:

Supported File Types

Description	Destination
Audio & Video	Audio/Video
.avi, .mpg, .mp4, .mpeg, .mp4, .m4v, .mid, .mp3,.wav, .wmv,	
Office & Productivity	Documents
.csv, .doc, .docx, .pdf, .ppt, .pptx, .rtf, .txt, .wpd, .xls, .xlsx, .xml, .zip	
Flash	Flash
.swf, .flv	
Photos & Graphics	Images
.jpg, .gif, .png, .bmp, .psd, .tif	
HTML Template	Templates
html, .html	

Format	Icon	Description
AICC		e-Learning format
.AVI		audio or sound file
.BMP	Image thumbnail	windows image file
.CSV		simple table file
.DOC/.DOCX		Microsoft Word file
.FLV/.SWF		Flash file
.GIF	Image thumbnail	standard web image
.HTM/.HTML		web page file
.JPG/.JPEG	Image thumbnail	standard image file
.MID		MIDI music file
.MOV / .M1V		QuickTime file
.MP3		audio file
.MP4 /.M4V		QuickTime file
.MPG / .MPEG		video file
.PDF		fixed layout file
.PNG	Image thumbnail	image file for print
.PPT / .PPTX		PowerPoint file
.PSD		Photoshop file
.RTF		simple text file
SCORM		Industry standard eLearning format
.TIFF	Image thumbnail	digital camera file
.TXT		simple text file
.WAV		audio or sound file
.WMV		windows media file
.WPD		Word Perfect file
.XLS/.XLSX		Excel file
.ZIP		compressed file
XML		Extensible Markup Language

15.1.1 File Type Considerations

Below are some factors to consider for optimal user experience when uploading different file types to Informetica:

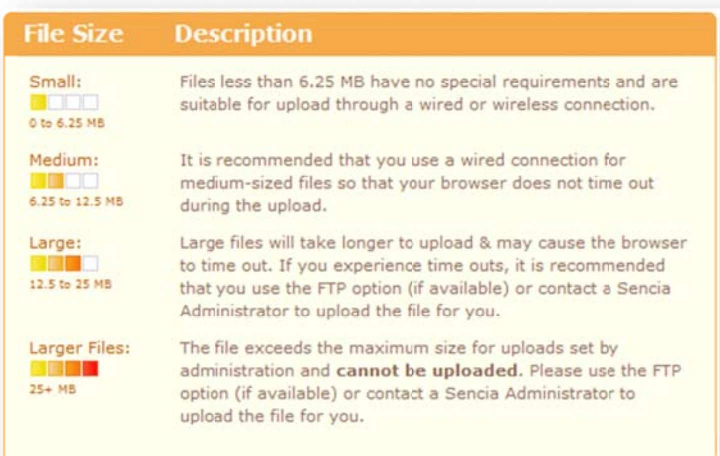
3rd Party Software: Users may require 3rd party software to view some file types, depending on their workstations. For example, users without PowerPoint may need a PowerPoint viewer and Flash files require a browser with a flash plugin (expect for iOS, which does not support flash).

PowerPoint: Users must have PowerPoint or the PowerPoint viewer installed on their local machine to view PowerPoint presentations. When you insert a link to a PowerPoint file within your product, users can select the link to download a copy of the file to their computer. You may consider changing the format of a PowerPoint file if your users will not have access to PowerPoint.

Alternatives to using PowerPoint:

Presentations without sound or animations	Presentations with sound or animations
Save the PowerPoint document as a PDF file. You can save the file as PDF directly from PowerPoint and most modern browsers will open a PDF in a browser window.	Consider converting the file to SCORM, Flash, or HTML5. You will need a 3rd party authoring program (such as Adobe Captivate or Articulate Presenter) to accomplish this.

File Size: The larger a file is, the longer it will take to upload. Uploads are affected by both web browser capabilities and the type of access you are using to the internet. It is possible that you may run into a file that is simply too large to upload. If this is the case, contact your site manager for help. Here are some recommendations and instructions for files of varying sizes:



File Size	Description
Small: 0 to 6.25 MB	Files less than 6.25 MB have no special requirements and are suitable for upload through a wired or wireless connection.
Medium: 6.25 to 12.5 MB	It is recommended that you use a wired connection for medium-sized files so that your browser does not time out during the upload.
Large: 12.5 to 25 MB	Large files will take longer to upload & may cause the browser to time out. If you experience time outs, it is recommended that you use the FTP option (if available) or contact a Sencia Administrator to upload the file for you.
Larger Files: 25+ MB	The file exceeds the maximum size for uploads set by administration and **cannot be uploaded**. Please use the FTP option (if available) or contact a Sencia Administrator to upload the file for you.

15.1.2 Video File Considerations:

Buffering: Consider how often a long video will need to buffer before and during play. Buffering occurs during the time to move data from one place to another, for example transferring a video from a web server to a user's computer. The larger the file or the slower the internet connection, the more buffering is required. To minimize the wait time for users to view content, consider reducing the size, length, and resolution of files.

Length: Video length around 3-5 minutes is a typical for a video file. For longer videos, consider using smaller clips played in succession, or create a slide show.

Resolution: Since every user will have different internet speed access, consider the resolution of the file. The higher the resolution the faster your users' connections to the internet will need to be.

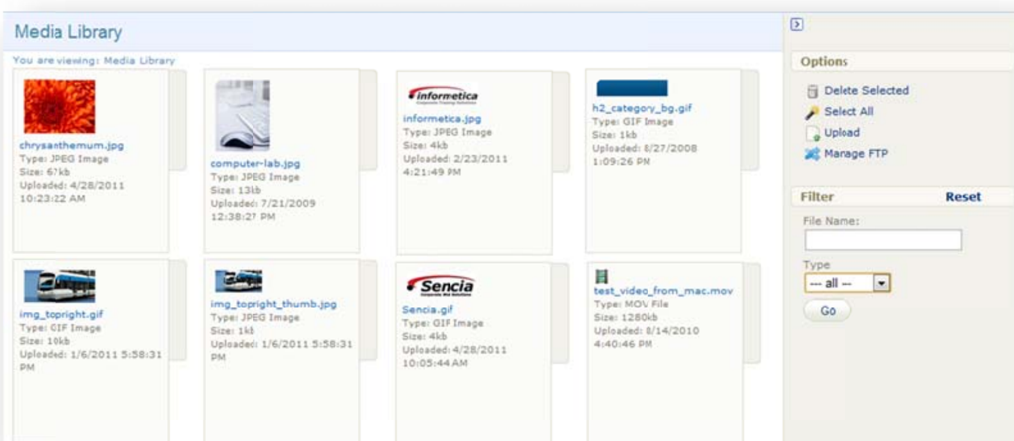
File type: Using the supported video file formats will help ensure that your videos play successfully on the web.

Media Player: Informetica has a built in media player that will play any of the supported file types, however some premade courseware also has a built in media player. Ensure that the player is updated and optimized for use on the web.

15.2 Global Media Library

This option is available only to site managers.

The global library houses files accessible only by site managers. Site managers have the option of using files located here when working within products. The global media library is accessible via the library tab.



Thumbnail: An image or icon represents each file.

Name: Select the name of a file to open in a browser window or download to your computer.

Type: The media file type.

Size: The size of the file in kilobytes.

Uploaded: Date and time that the file was uploaded.

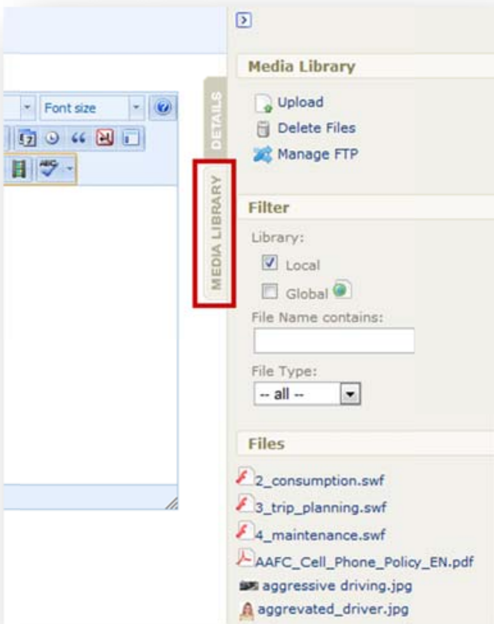
Options: Select, deselect, upload, and delete files. Manage FTP files if configured.

Filter: Filter files by name and type or reset the filter.

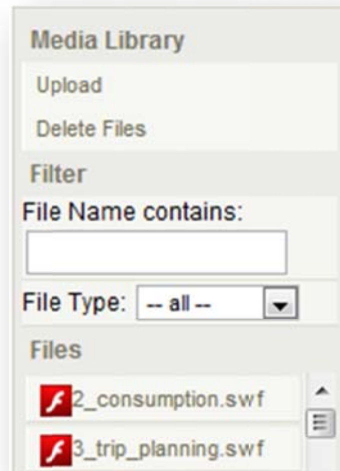
15.3 Local Media Library

The local library houses files within specific products and are only assessable by opening a specific product. The media library is available from the side bar within any product or asset. Site managers may need to click the media library tab within the product if they were viewing details previously. Site managers also have the option to use filed from either the global or the local media libraries.

Site Manager View



View for Other Users



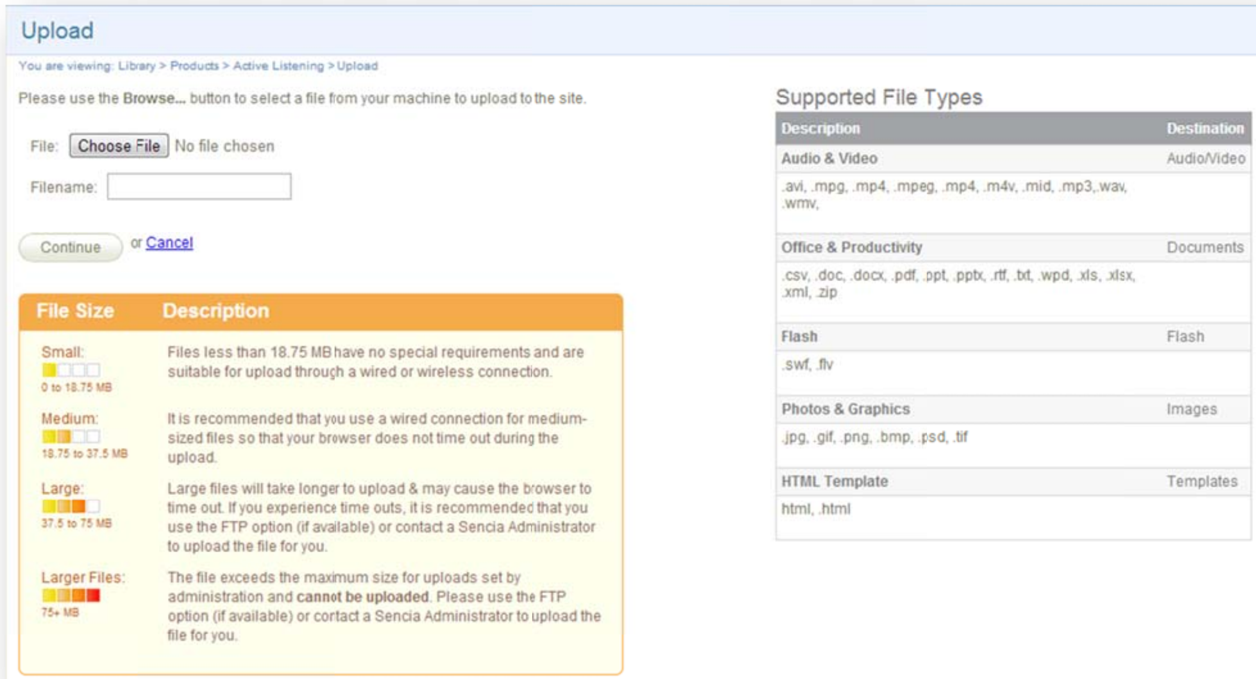
Media Library: These tools allow you to upload, delete and manage FTP files (site managers only).

Filter: Allows you to filter for specific files by library location and name or type. You can also reset the filter.

Files: This shows a list of all of the files in the local library.

15.4 Upload a Single File

Media files must be uploaded to the Informetica LCMS before you can insert them into a product or asset. To upload media files to your campus library, click on Upload in the media library menu to open the Upload Tool.



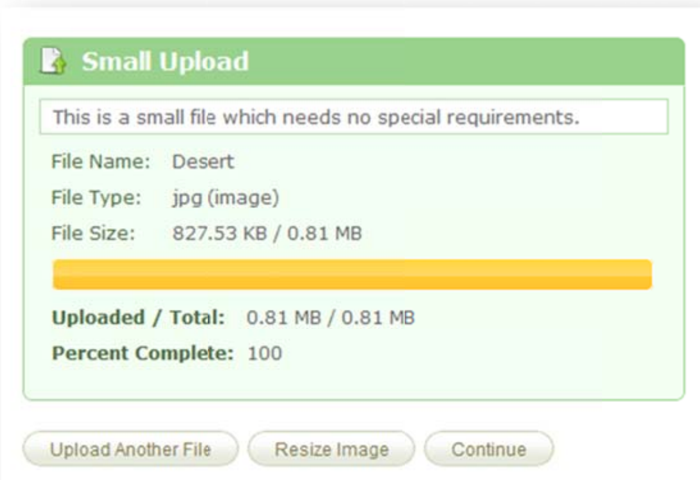
Choose File/Browse: Depending in the browser you are using the option showing here may be Browse or Choose File. Select the file you wish to upload from your computer.

Filename: You can keep the current file name or you can enter new name in the filename field. You do no need to add a file extension. If a file with the same name and extension already exists, you will receive a prompt stating that the file already exists. If you would like to overwrite the file, click the Overwrite File button. If you do not want to overwrite the file, click Cancel and change the file name.

File Size and Description: This information box gives you helpful instructions for uploading files of varying sizes. Due to varying internet connections and browser limitations, files over 25MB require an FTP transfer or aid from Sencia to upload. A Wired connection is recommended when uploading anything but small files to avoid connectivity issues. See your site manager for details.

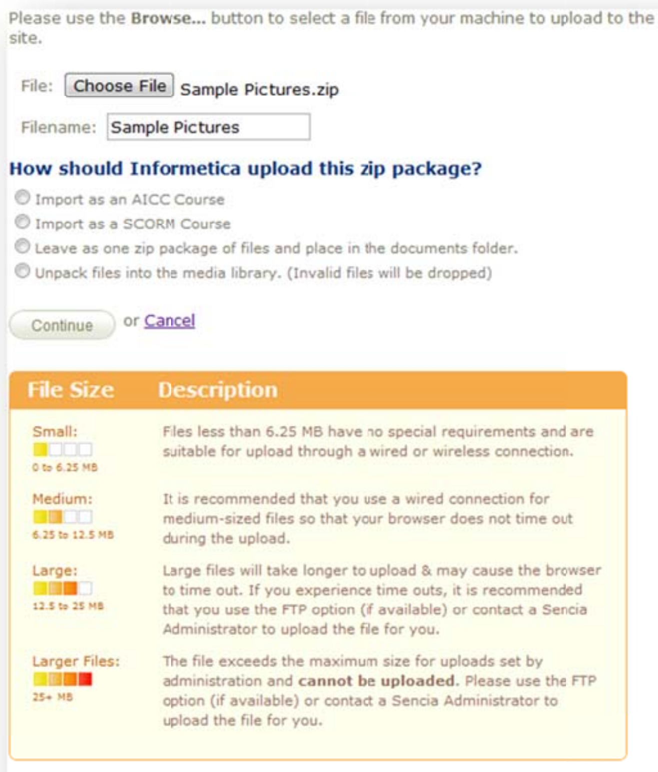
File Types: The table on the right hand size shows a complete list of file types that are supported (the example above is truncated and does not show the entire list).

Continue: Click Continue to upload the file or click cancel. During the upload you will see a progress bar that displays the status of your upload. You can then choose to upload another file or press continue to return to the product you were working in. If you uploaded an image, you will also have the option to resize it. Images that are over 700 px wide will automatically be resized. Image resizing is discussed in detail later in this chapter.



15.5 Upload Multiple Files

If you have several files to upload to the media library, you can package multiple mixed files and upload them as a single .zip file. Once uploaded, you can choose to leave the file as a .zip for users to download or you can select the option for Informetica to automatically unpack the files and place into the proper media library folders (images, documents, templates or multimedia). Zipped files will keep their original size when uploaded in zipped format. It is possible that you may run into a file that is simply too large to upload. If this is the case, a site manager may be able to use the FTP option or a Sencia administrator can help. Click **Upload** in right side menu to open the upload tool.



Choose File/Browse: What the button is called depends on the browser you are using. Select the file you wish to upload from your computer.

Filename: You can keep the current file name or enter new name in the filename field. If a file with the same name and extension already exists, you will receive the option to overwrite file to replace the existing file or click cancel and change the file name.

How should Informetica upload this zip package?

Select **Import as an AICC Course** if you are uploading premade courseware that is AICC compliant.

Select **Import as an SCORM Course** if you are uploading premade courseware that is in SCORM format.

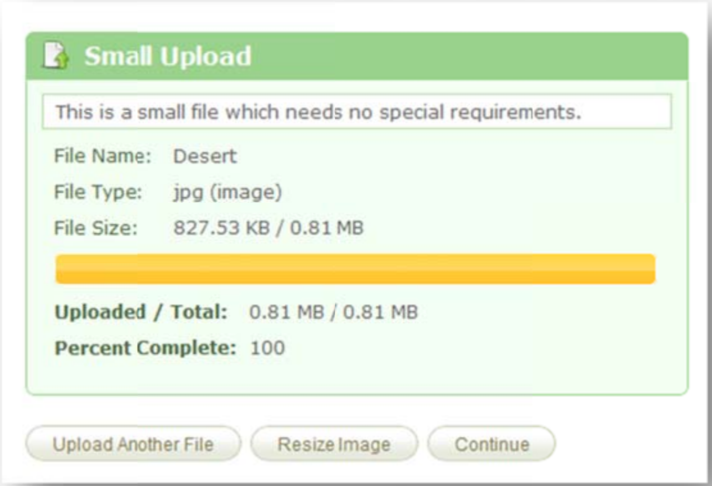
Select **Leave as one zip package of files and place in the documents folder** to create a download link to the file from the product.

Select **Unpack files into the media library** to unpack the files into appropriate folders (images, documents, templates or multimedia).

File Size and Description: This information box gives you helpful instructions for uploading files of varying sizes. Due to varying internet connections and browser limitations, files over 25MB require an FTP transfer or aid from Sencia to upload. A Wired connection is recommended when uploading anything but small files to avoid connectivity issues. See your site manager for details.

File Types: The table on the right shows a complete list of file types that are supported.

Continue: Click Continue to upload the file or click cancel. During the upload you will see a progress bar that displays the status of your upload. You can then choose to upload another file or press continue to return to the product you were working in. If you uploaded an image, you will also have the option to resize it. Images that are over 700 px wide will automatically be resized. Image resizing is discussed in detail later in this chapter. Please note that if a file with the same name and extension already exists, it will automatically be overwritten. If an invalid file format or corrupt file is in the zip package, it will be skipped and will not be added to the media library.



15.6 Upload Large Files via FTP

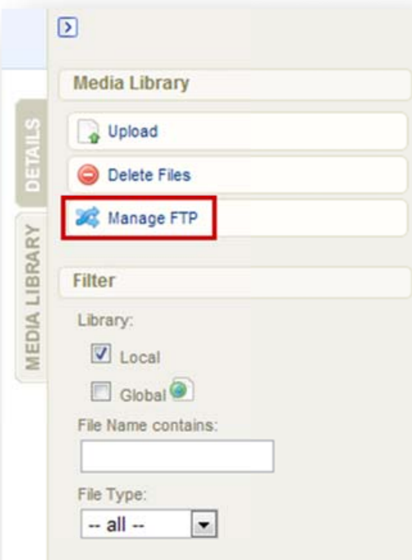
This option is available only to site managers.

If a file exceeds the maximum size for uploads then you can use the manage FTP Manage FTP tool, if available for your site or contact a Sencia Administrator to upload the file for you. Manage FTP is located under the Options menu in the global media library and under media library in the local media library.

15.6.1 FTP Setup

This initial setup is only necessary once unless there are changes made. Use of an FTP program to transfer files to the Informetica FTP folder is necessary. It is recommended that clients work with their IT department to setup an FTP program based on their company's internal policies. Sencia provides a dedicated FTP account, username and password for secure FTP uploads to the LCMS.

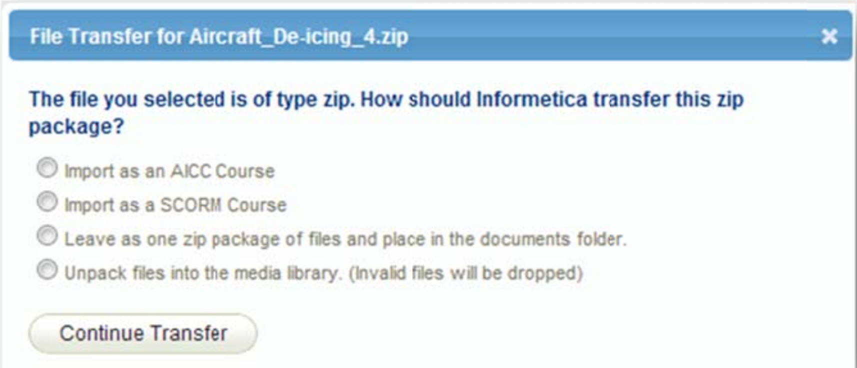
15.6.2 Manage FTP



Navigate to the destination media library (either the global library or a specific product's library) and click on **Manage FTP** Manage FTP.

You will see a file view of your FTP folder and may select any file to transfer to the media library you are in. Notice that from the right hand menu you can return to the media library before making the transfer, delete selected files, and choose to use the regular upload tool. Click the transfer file button when you have selected the file you need.

The system will ask you how you want to import the file. Select the appropriate option, and then click continue transfer.



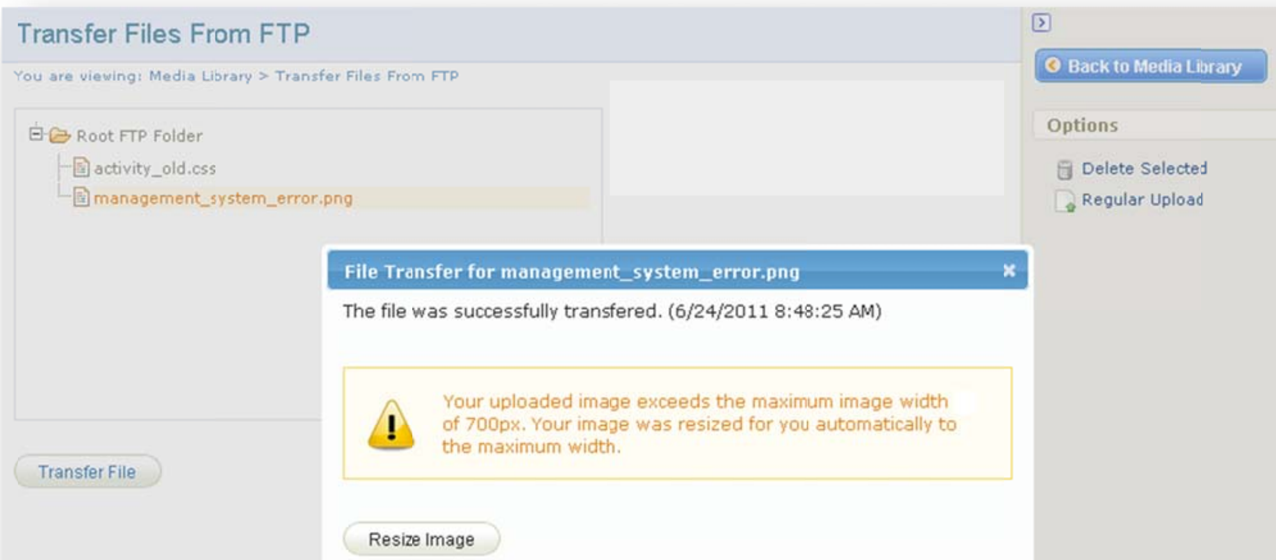
Select **Import as an AICC Course** if you are uploading premade courseware that is AICC compliant.

Select **Import as an SCORM Course** if you are uploading premade courseware that is in SCORM format.

Select **Leave as one zip package of files and place in the documents folder** to create a download link to the file from the product.

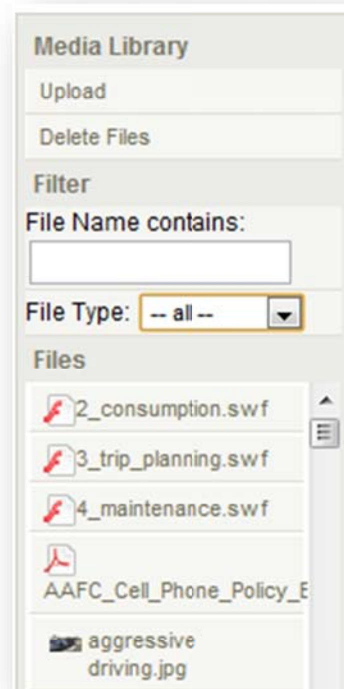
Select **Unpack files into the media library** to unpack the files into appropriate folders (images, documents, templates or multimedia).

Once the transfer is complete, you will see a confirmation window. For image files, you may also see a notice about resizing. The transferred files are included in the media library and can be used like any other file.



15.7 Insert Files

Media files must be uploaded to the Informetica LCMS before you can use them. There are two methods to insert media files. Navigate to the asset where you want the file to appear and position your cursor on the in the publishing window where you want the file to be placed.



Click the file you want to insert from the left-hand column under Files or you use the tools at the top of the publishing window. Use the **insert/edit embedded image** button for photos and image files and the **insert/edit embedded media** button for files such as Flash, QuickTime, Windows Media or Real Media files.

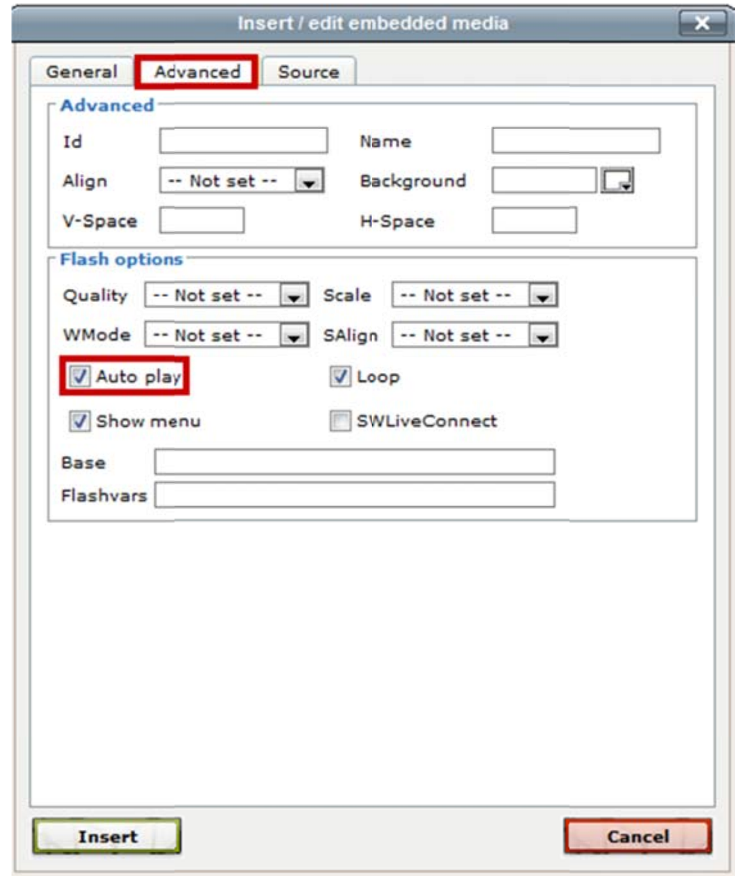
Click the save button in the publishing window. The file will be placed on the page where you set your cursor. Click the Save button in the Publishing Window to update the change to the page. Inserting an image will put the image into your Publishing Window while inserting PDF, Word, PPT or Excel files will place an icon on the page with a link that will open the file in a new window.

Link on Page

If you would prefer to create a link to the uploaded media file on your page instead of inserting it, simply click and drag the file from the media library onto the page and then release to create a link.

15.7.1 Embedded multimedia files

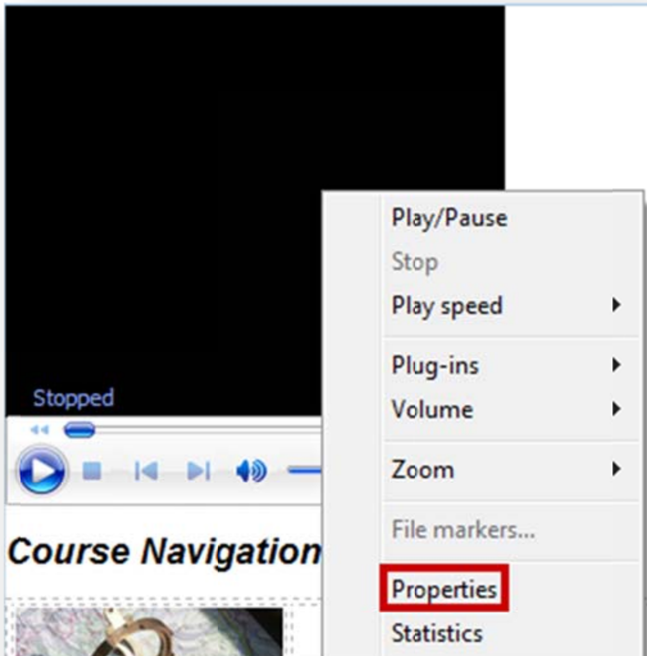
When you insert an audio or video file, it is inserted by default in an embedded format that is set to automatically play when the user visits the page. This means that it is be placed as a clip directly on the page and will play the video or audio automatically as appropriate unless you change the default. To prevent the multimedia file from playing automatically, first insert the audio or video file as normal, select the inserted file on the page, click the embed image icon and select the advanced tab at the top. From there, just make sure that the auto play option is not checked off.

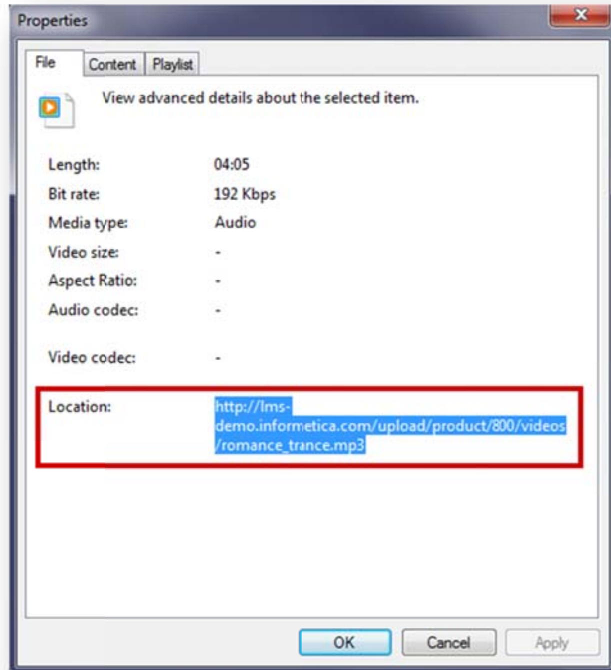


15.7.2 Creating a link to a multimedia file

If you do not want the audio or video file to be embedded, you can instead create a link to the file. There are two ways to accomplish this:

1. Insert the video or audio file on another page and then create a link to that page.
2. Insert the audio or video file as normal and then right click the inserted file. A bowser menu will appear. Select properties from this menu and copy the link. You can now paste this link onto your page as is or for a cleaner look, add new text and then link the URL to it.

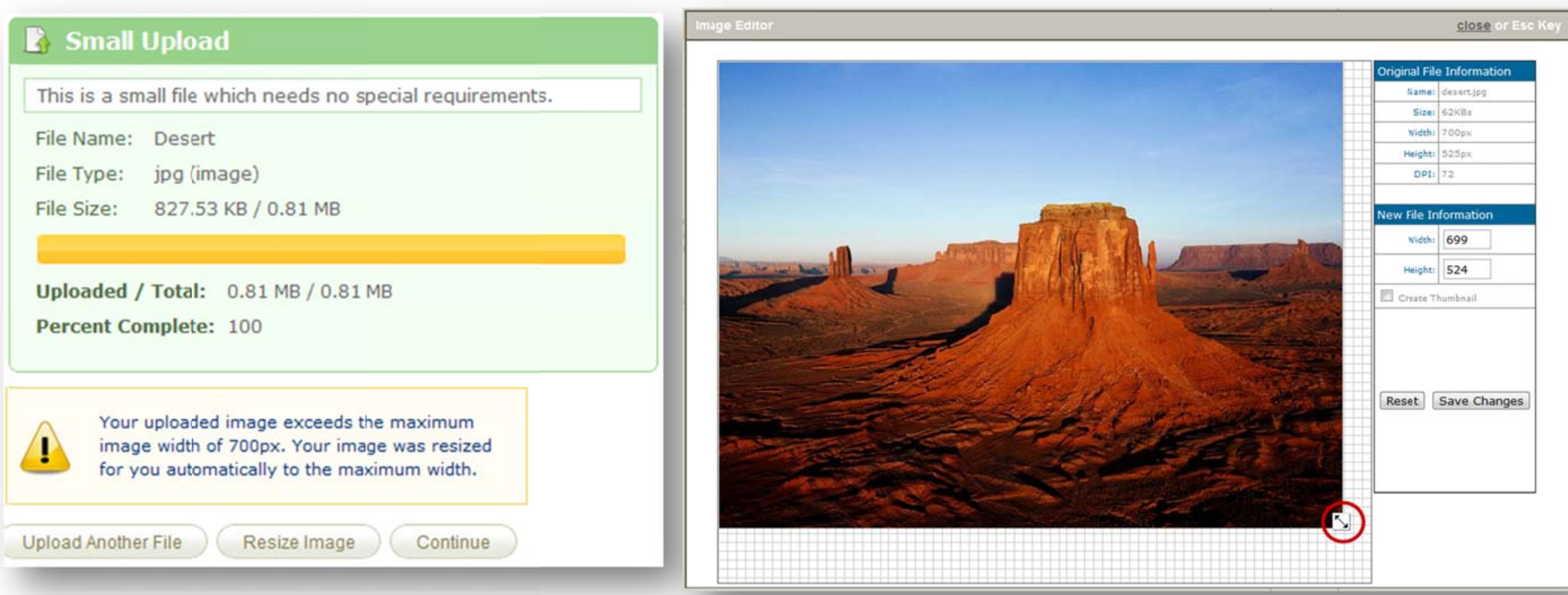




15.8 Resize Images

After uploading a new image, click the Resize Image button at the bottom 

to open the Image Editor. Note that images beyond the maximum width of 700 px will be automatically resized.

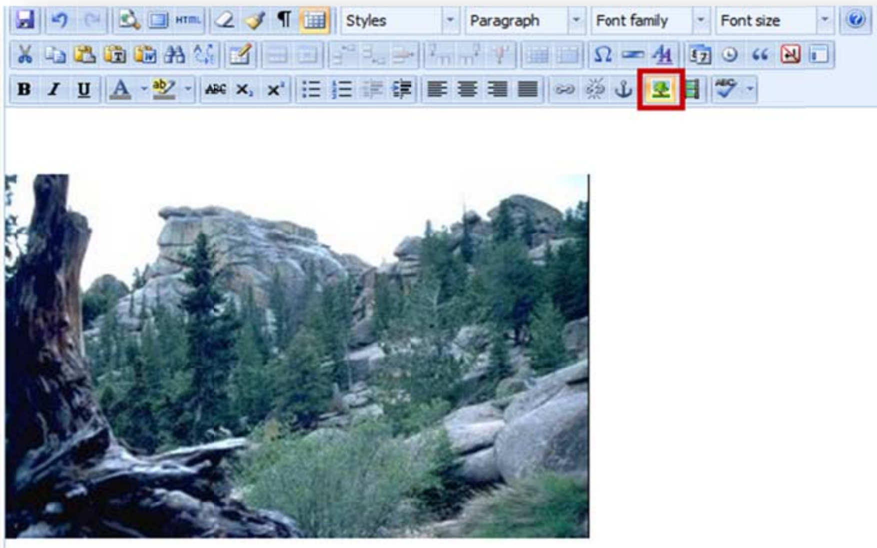


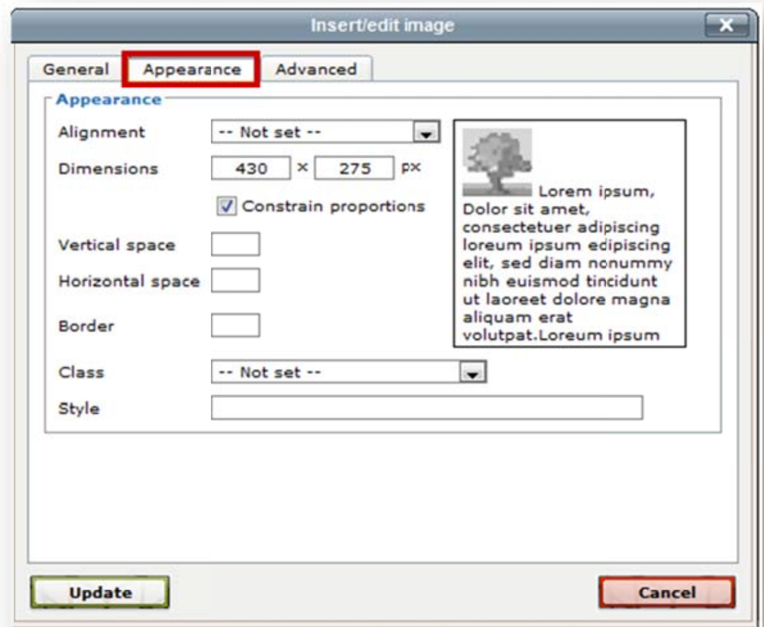
Enter the new image dimensions in the Width and Height fields in the New File Information table or click and drag the resize handle  located on the bottom right of the image to the desired size. You can use the check box in front of Create Thumbnail to have the image Resizer create a thumbnail of the image.

Click **Save Changes** if you are happy with the size of the image, or click the **Reset** button to start over. You can also click **Close** at the top to close the image editor to return to the media library without saving your changes.

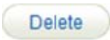
Alternatively, you can use the publishing tools within the product to change the size of an image. Navigate to the page you wish to edit an image on and then click the inserted image to select it. Click the image icon in the publishing tools at the top of the publishing window to open a new modal window.

Click the appearance tab and then enter new dimensions for the image (width by height). Click the update button to return to the publishing window. If you like the change, save the page.

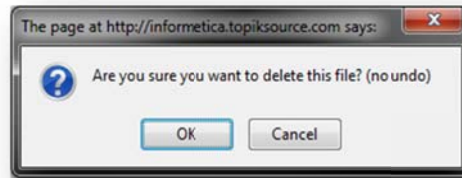




15.9 Delete Media Files from the Library

Open the product in which the file(s) you would like to remove are located. Click **Delete Files** in the media library menu. Select the type of file from the **Select Section** drop down menu to sort the files by type. Put a check in front of any of the files you wish to delete and then press the **Delete** 

. A prompt will ask you to confirm that you want to delete the files.



15.9.1 Delete files from the Global Library

This option is available only to site managers.

Select the files you would like to delete by clicking on them in the global media library then click **Delete Selected** in the right side menu. A prompt will ask you to confirm that you want to delete the files.

15.10 Updating Existing Files

If you have a file or image that has been updated, the best way to update it is to upload the file and make sure the filename field has the exact same name as the old file. This way you can overwrite the old file when prompted.
Once you've updated the file, all of the content linked to that file will automatically be updated as well. This means that you will not need to remove the old file and insert the new file into the publishing windows throughout the product. Alternatively, you can upload the new file with a different name and then manually change all of the content linked to that file within your product.

16. Courseware and SCORM

Courseware assets are premade files that can be imported directly into Informetica using the standardized eLearning format called Shareable Content Object Reference Model (SCORM). SCORM is comprised of self-contained files that will run in Informetica as stand-alone content and can easily be used within different learning management systems.

Topics Covered In This Chapter

16.1 What is SCORM?

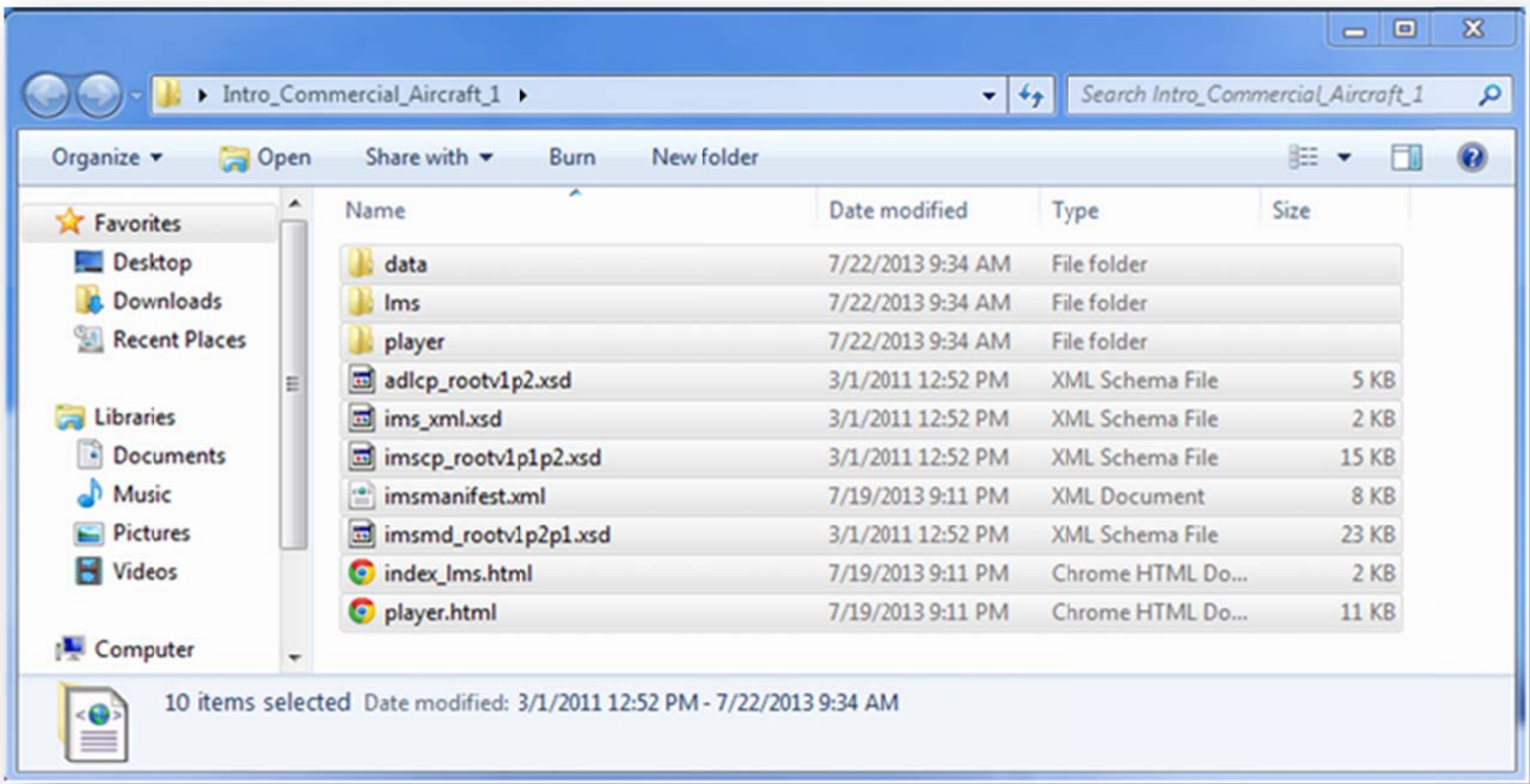
The intent of SCORM files is to create online training material that can be shared across systems. SCORM, the Sharable Content Object Reference Model, integrates a set of related technical standards, specifications, and guidelines designed to meet the functional requirements of accessibility, interoperability, durability, and reusability. SCORM defines how to create “sharable content objects” or “SCOs” that can be reused in different systems and contexts.

16.2 SCORM Content Specifications

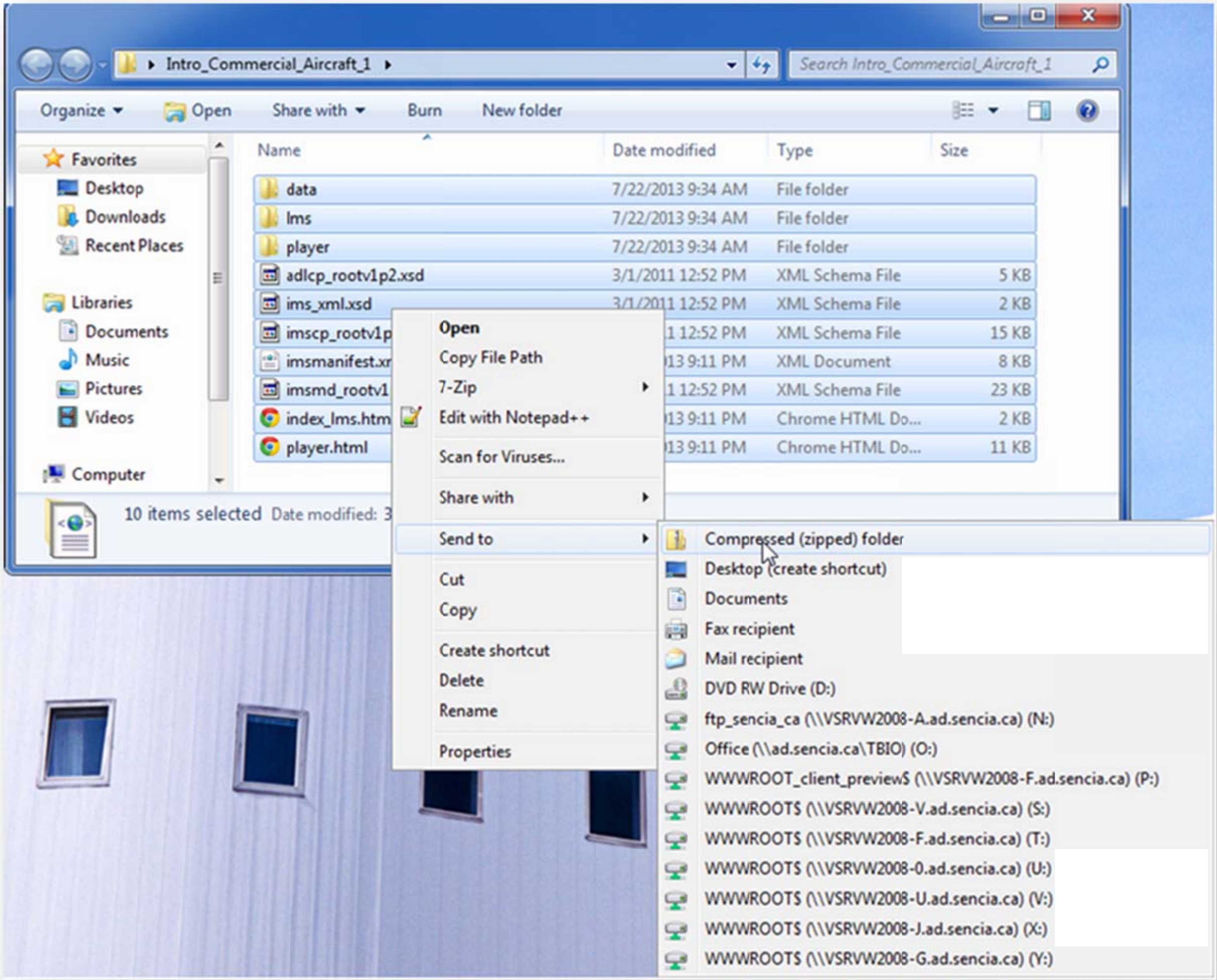
SCORM objects can include functionality to announce user interaction data to the LMS, such as responses to test questions and completion. SCORM designed in this way will allow Informetica to record that information so can be pulled into a preset report. While SCORM can push this sort of information out to the LMS, the LMS itself cannot reach into the SCORM to extract the information, so make sure that the course is designed according to your needs as they pertain to the information you will want the LMS to collect and report on.

To upload a valid SCORM package, it must be within a zipped file and include a valid imsmanifest.xml file. Confirm that the course resides in the root of the zip package and that is not in a subdirectory. Courseware files are typically zipped within a directory that is the same name as the zip package. The imsmanifest.xml file and other launch files need to sit in the root of the zip package.

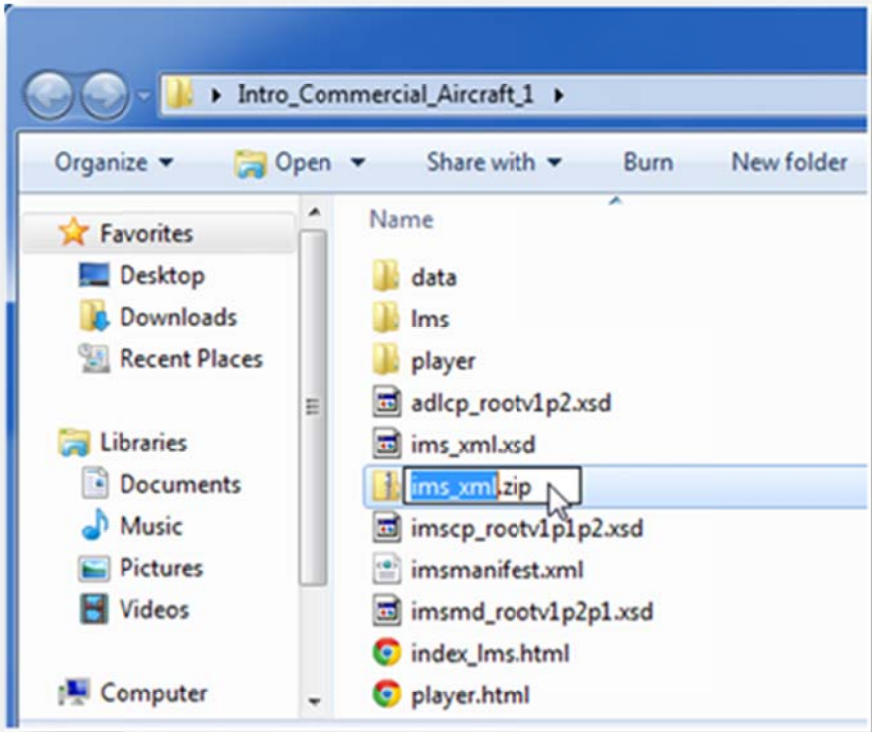
1. Open the folder containing your SCORM course content and then select all of the separate folders and files. Do not click on the top level folder with all the course content in it.



2. Right click one on the highlighted files. Then click on Send To-> Compressed (Zipped) folder.



3. Right click the .zip file that was created and rename it to the course name e.g. “Intro to Security”.



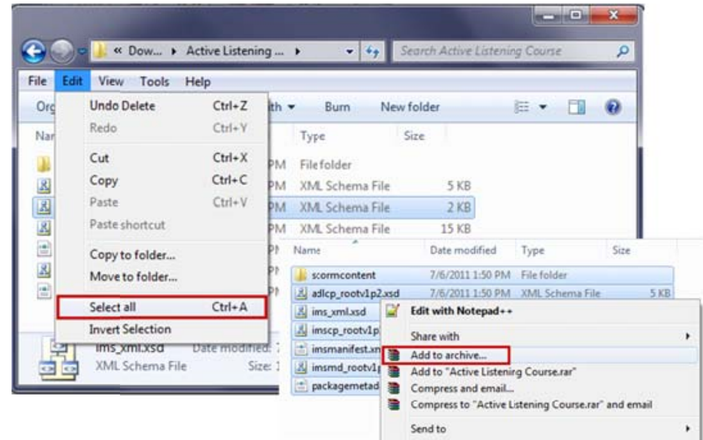
4. Copy the zip file where you desire for use.

16.3 Pack SCORM Files into .zip Format

This section explains how to put your SCORM files into .zip format so that they are ready for upload to the LCMS. Make sure you have a folder that contains all of the SCORM files needed for one courseware asset and only those files. Please note that while .rar format is often an interchangeable method of compressing files, Informetica LCMS requires SCORM files to be in .zip format. There are multiple ways to accomplish this. This manual covers two methods, but any method that puts files into .zip format will work:

- Using a program such as WinRAR or WinZIP
- Using Windows 7 built-in compression tool

16.3.1 How to zip files using WinRAR

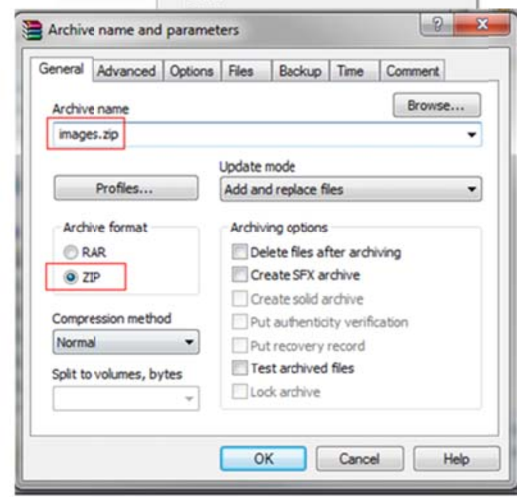


You can download WinRAR from http://www.win-rar.com. This is a third party program and not supported by Sencia.

To compress (or zip) a folder:

1. Open the folder and select all of the files. You can do this by using the CTRL + A buttons on your keyboard or by clicking the edit button at the top of the window and then selecting **Select all**.

2. Right-click the selected files and choose **Add to archive…**



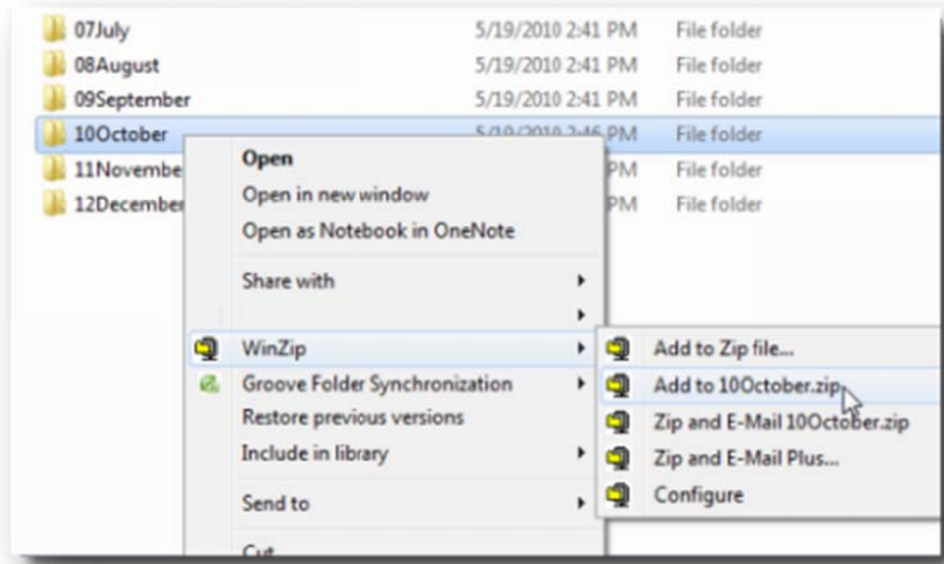
3. When the WinRAR window appears, make sure you **select the ZIP archive format**. Press **OK** and a .zip file will be created in the same directory.

4. A new compressed folder will be created in the same location as your original file. You can rename the new zip package as you like, but ensure that the .zip file extension is retained. To rename it, right-click the folder, click **Rename** and then type the new name.

You can visit the Knowledge Base on the WinRAR website for more detailed information: http://www.win-rar.com/knowledgebase.html

16.3.2 How to zip files using WinZip

You can download WinZip from http://www.winzip.com. This is a third party program and not supported by Sencia. To compress (or zip) a folder:



1. Open the folder and select all of the files. You can do this by using the ctrl+a buttons on your keyboard or by clicking the edit button at the top of the window and then selecting **Select all**.

2. Right-click the selected files and choose **Add to filename.zip** (where filename is the name of the folder you are zipping) from the WinZip submenu.

3. A new compressed folder will be created in the same location as your original file. You can rename the new zip package as you like, but ensure that the .zip file extension is retained. To rename it, right-click the folder, click **Rename** and then type the new name.

You can visit the Knowledge Base on the WinZip website for more detailed information: http://kb.winzip.com/kb/

16.3.3 How to zip files with Windows 7

To compress (or zip) a folder:

1. Open the folder and select all of the files. You can do this by using the ctrl+a buttons on your keyboard or by clicking the edit button at the top of the window and then selecting **Select all**.

2. Right-click the selected files and choose **Send to**, and then click **Compressed (zipped) folder**.

3. A new compressed folder will be created in the same location as your original file. You can rename the new zip package as you like, but ensure that the .zip file extension is retained. To rename it, right-click the folder, click **Rename** and then type the new name.

You can get more detailed instructions and watch a short video on how to zip files Microsoft's website: http://windows.microsoft.com/en-US/windows7/Compress-and-uncompress-files-zip-files

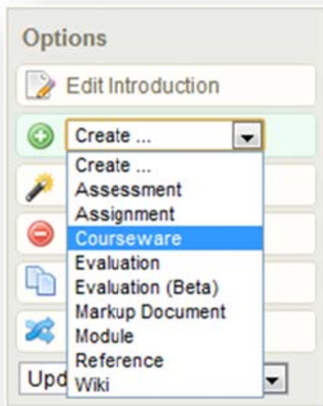
16.4 Create and Edit Courseware

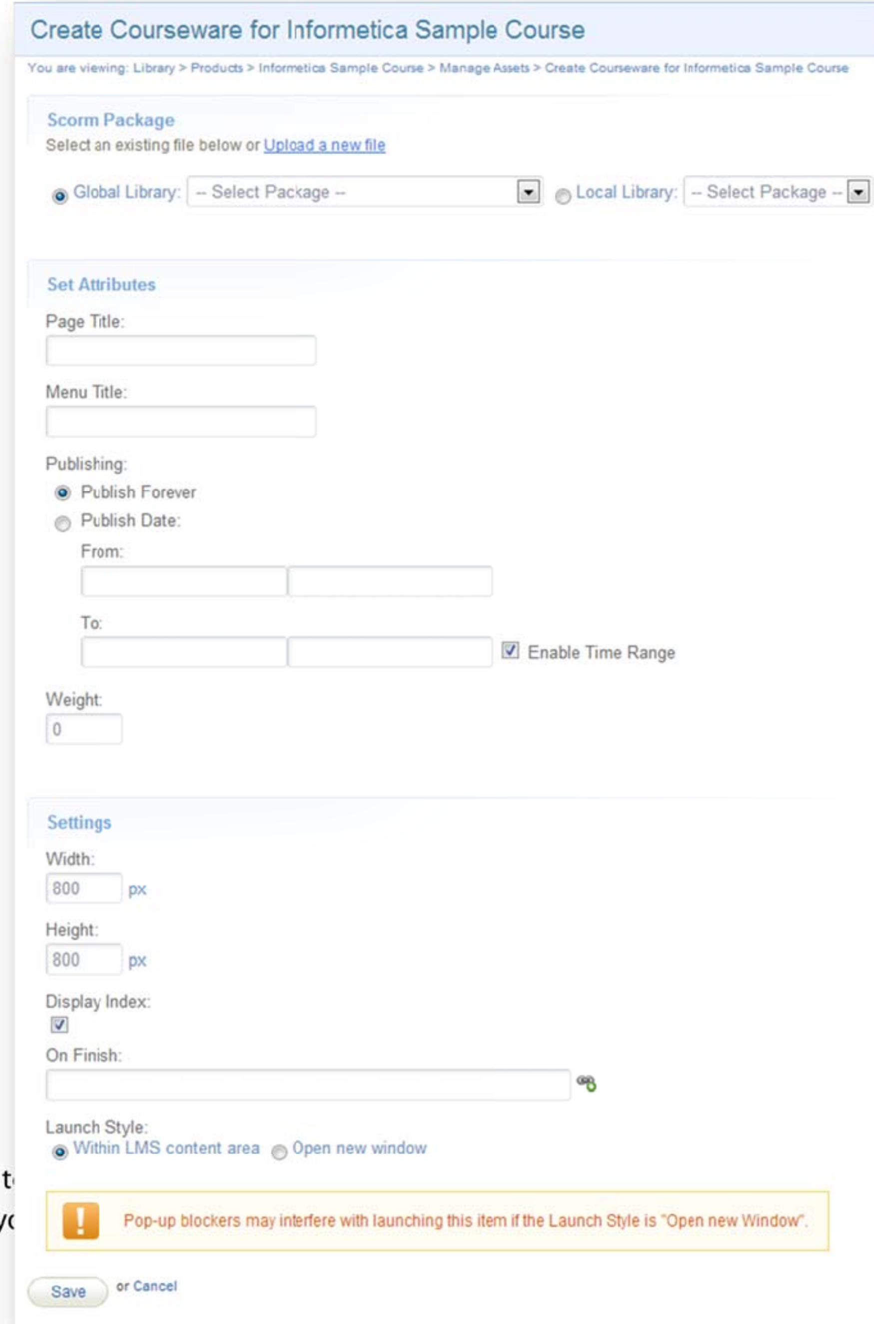
To fully create a SCORM asset you will need to complete the following steps:

- ✓ Create a SCORM Asset
- ✓ Upload a SCORM file
- ✓ Edit Courseware Attributes and Settings

16.4.1 Create

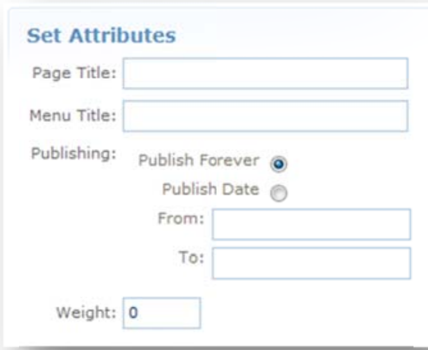
1. Navigate to the manage assets page.
2. Click **Create** under the options menu on the right
3. Select **Courseware** from the dropdown menu.
4. Fill out the form.
5. Click the **Save** button.

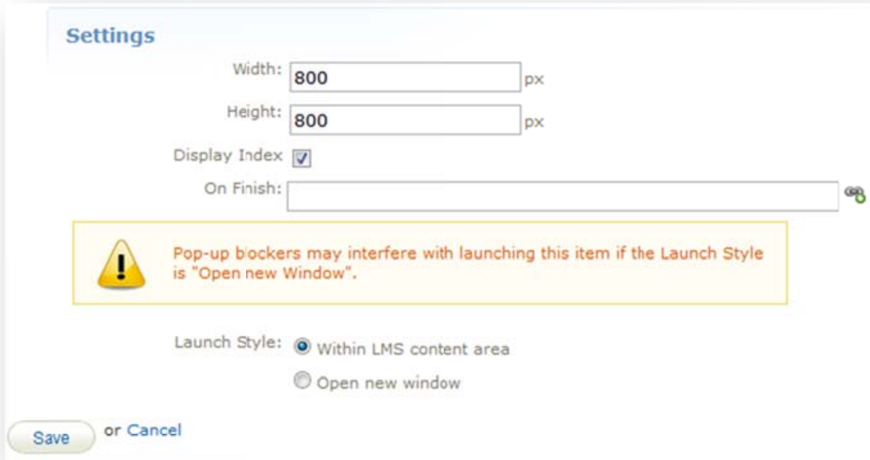




16.4.3 Courseware Attributes and Settings

Courseware Settings only need to be changed if your SCORM is not designed t the courseware to run within the frame of the Informetica system itself, then yo


Set Attributes
Page Title:
Menu Title:
Publishing:
Publish Forever
Publish Date
From:
To:
Weight:
0


Settings
Width:
800
px
Height:
800
px
Display Index
On Finish:
Pop-up blockers may interfere with launching this item if the Launch Style is "Open new Window".
Launch Style:
Within LMS content area
Open new window
Save
or Cancel

Below is a brief description of the fields:

Field	Description	Input
Page and Menu Title	Enter the name of the courseware. The menu title is what shows in the assets list and in side menus. This is often a short from of the page title. Note that left side menus have a limited amount of display; the longer your menu titles, the more cramped the display will be.	Required
Publishing	Select "Publish Forever" to have no publishing date. Select "Publish Date:" to enter a publishing date rage. You can manually enter a date or use the calendar pop up to choose a date.	Optional
Weight	Enter a percentage for the grade weight toward the overall product, if applicable.	
Width and Height	Determines the size and shape of the browser window that the content launches in. When trying to determine the perfect fit, keep in mind that this appearance is also affected by which monitor and browsers your users log in with. Many browsers will have a resizable window, as well.	Optional
Display Index	Click the box to insert a check mark if you want this asset to appear in the course index, if applicable. Click the box to remove the check mark if you do not want this asset to appear in the course index.	Optional
On Finish	Select a page in the course where users will be automatically directed once they have completed the Scorm asset. The following conditions affect where the Course Landing Page directs users: 1. If the course introduction page is activated, then the Course Landing Page is the Introduction page. 2. If the course introduction page hidden, then the Course Landing Page is the first asset in the course.	Optional
Launch Style	Select the appropriate button to open the courseware into the LMS content area or as a new window.	Optional
Save	Click Save. After saving, you be brought back to the Manage Assets page.	Required

16.4.4 Edit Existing Courseware Assets

From the manage assets page, click on the name of the courseware you wish to edit to open it. From here you can select or upload a different SCORM file.

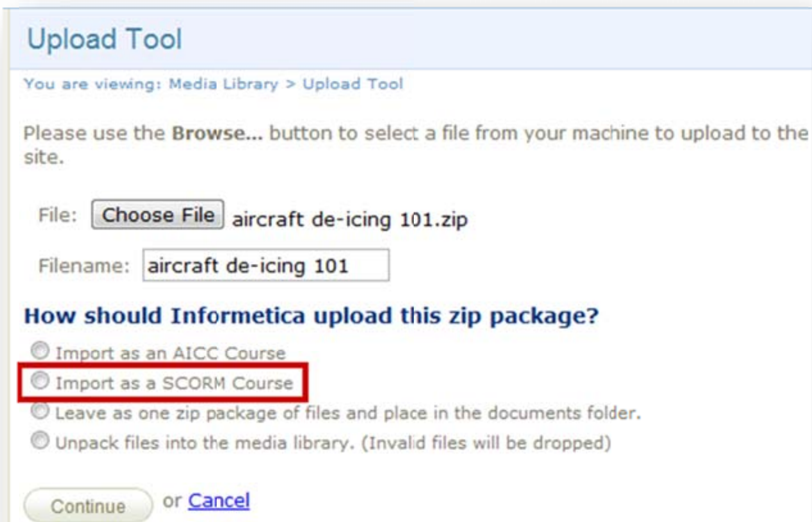

Assertive Verbal Skills: Manage Assets

You are viewing: Product Library > Assertive Verbal Skills > Manage Assets

Name	Type	Order	Status	Created	Updated
Assertive Verbal Skills (Assertive Verbal Skills)	Courseware	1	hidden	3/25/2011 10:22:35 AM Sierra Trees-Turner	3/25/2011 10:22:48 AM Sierra Trees-Turner

16.4.5 Upload a SCORM File

Select an existing file from the global or local media library or upload a new file. To upload a new file to the product's local media library, click the upload a new file link to open the upload tool. Informetica requires that SCORM files must be in ZIP format. Click **Choose File/Browse** to select the file you wish to upload from your computer. You can keep the current file name or enter new name in the **Filename** field. If a file with the same name and extension already exists, you will receive the option to overwrite file to replace the existing file or click cancel and change the file name. Select **Import as a SCORM Course** if you are uploading premade courseware that is in SCORM format. After you upload a new file, it will be available in **Local Library** dropdown menu for you to select. To learn more about uploading files, visit the Media Library chapter of this manual.



16.5 Best Practises for Using Articulate SCORM Products within Informetica

1. Articulate Studio 09 does not work well with Internet Explorer 8. Ensure your browsers are up to date if using this product. Articulate Studio 13 fixed issues with Internet Explorer 8.
2. Articulate Storyline best publishing options:
    a. Publish as SCORM 2004, 2nd edition.
    b. Select completion option Complete/Incomplete.
3. Ensure that completion rules are properly set for each SCORM asset within Informetica.
4. Some courses run better in a new window and some run better embedded within Informetica's frame. Embedded SCORM might be a solution for courses where users attempt to use the browser to exit instead of using the SCORM's player settings.

16.7 Updating SCORM Files

There are several ways to update a SCORM asset:

- Upload a new SCORM file and redirect the asset to the new file instead of the existing file
- Deactivate the existing SCORM asset and create a new asset for the revised SCORM file within the same product
- Deactivate the existing SCORM asset and create a new asset for the revised SCORM file within a different product
- Overwrite a SCORM file: Upload the file to the product media library, not the global media library. The file must have the exact same file name as the file you wish to overwrite and only then will only see the option to overwrite the file after you select the continue button.

Read below for some consideration on how each choice will impact you and your users to help you determine the best method for your needs.

Use caution when overwriting SCORM files as you and your users could be affected in the following ways:

- Users who have already taken this SCORM or who are currently in progress may be affected; they may see the old SCORM content and the book marking feature may direct them to an old file that no longer exists. We recommend that you thoroughly test before making this change available to see how it affects your users.
- SCORM overwrite will save itself over the old file, so there will no longer be a copy of the old file in the LMS.
- The system will not differentiate between the old version and the new version.
- Your users may not be able to take the SCORM asset again, since they already completed the old version. This depends on how your SCORM file is programmed / authored.
- Only the most recent scores for this asset are available in the LMS.
- If you require everyone to take the new asset, they will already have scores recorded for the old SCORM.
- Users who completed a certification associated with this SCORM will still have the certification, even if they do not take the new version.
- When you run reports, you will not be able to compare the two versions; you will not be able to easily monitor which users have completed the new version.
- You will not know which version users are certified for.

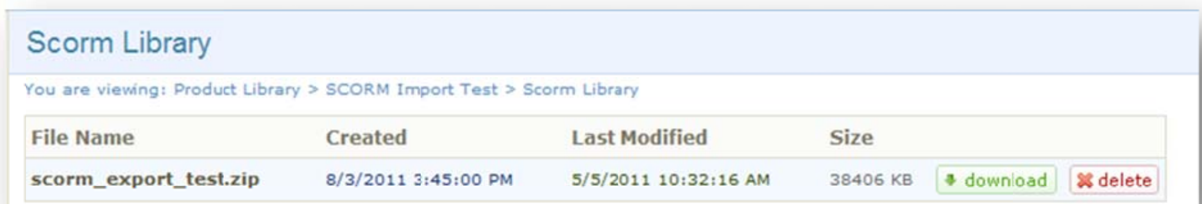
Considerations and User Impact	Upload Revision to Same Asset	Upload Revision to New Asset	Upload Revision to New Product	Overwrite SCORM File
Re-enrol existing users to product required	No	No	Yes	No
Users in progress will see revision	No	Yes	Yes	No
User links or bookmarks may be affected	No	Yes	Yes	Yes
Opt to require users to complete both versions	No	Yes	Yes	No
Allows for recertification of new version	No	Yes	Yes	No
Current certification invalid if old version inactive	No	Yes	Yes	No
Create new certification to support both versions	No	Yes	Yes	No
Links directing to the revision will remain valid	Yes	No	No	Yes
System differentiates between versions	No	Yes	Yes	No
Grades are only available for more recent attempt	Yes	No	No	Yes
Grades or certifications obtained in prior version may apply without completing the revision	Yes	No	No	Yes
Determine which version users are certified for	No	Yes	Yes	No
System retains a copy of the old version of the file	Yes	Yes	Yes	No
Monitor which version users have completed	No	Yes	Yes	No
Taking revision may be affected by course setup	Yes	No	No	Yes
This solution is best used in the following scenarios:	Revision is required by users who completed original version	Revision is required by users who completed original version	Revision is required by users who completed original version	Revision not required by users who completed original
	There are few users in progress	There are many users in progress	There are many users in progress	There are few users in progress
	Revision contains few changes	Revision contains important changes	Revision contains important changes	Revision contains few changes
	Only newly enroled users need the revision	Users must launch new asset to see the revision	Users must be enroled to a new product to see the revision	Only newly enroled users need the revision
	Separate tracking is not needed	You need to retain separate tracking	You need to retain separate tracking	Separate tracking is not needed
	You do not intend to use both versions	You intend to use both versions	You intend to use both versions	You do not intend to use both versions
	Updates to associated certifications not required	Updates to associated certifications required	Updates to associated certifications required	Updates to associated certifications not required

16.8 Delete Uploaded Courseware Files

This option is available only to site managers.

To delete from the global library, go to the media library and click on the SCORM file to select it. Click **Delete Selected** from the options menu and then click **Yes** on the confirm delete window.

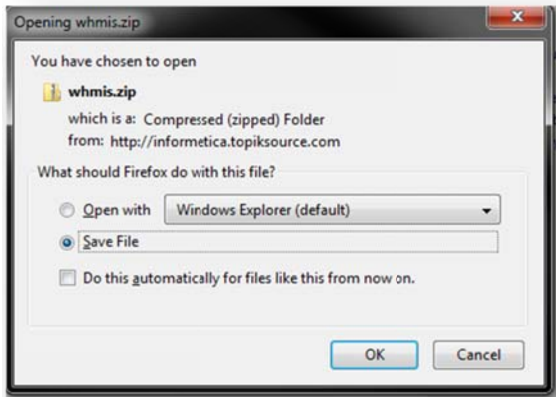
To delete from the local media library, navigate to the Product that has the SCORM file that you would like to delete, and then click on **SCORM Library** in the properties menu on the right. Click **delete** SCORM course that you would like to delete and then choose ok in the confirmation window.



16.9 Download Courseware

This option is available only to site managers.

Open the product containing the course that you would like to download. Click **SCORM Library** in the properties section of the side bar. Click on the **download** link for the SCORM course you want. In the open file window, choose **Save File** and then click **OK**. Choose where you want to save the file on your computer and click **Save**. The SCORM file will download as a zipped file to your computer



16.10Export Content Created in Informetica to SCORM

This option is available only to site managers.

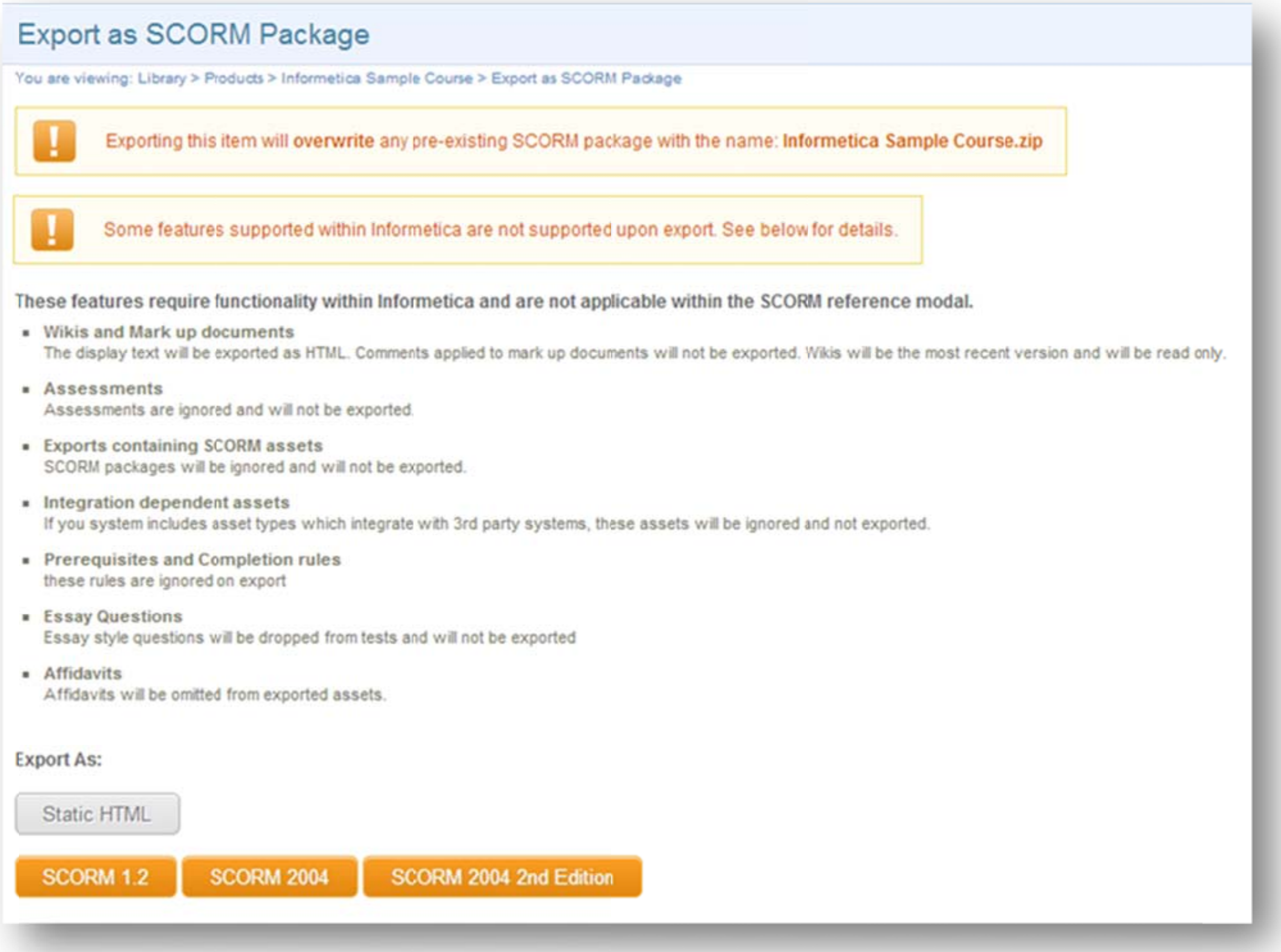
The SCORM Export tool will make a copy of your product available for download as a SCORM compliant file. The export sits in the product's SCORM Library where you can download a copy or delete it. Exporting courseware is intended for only products that are not already in SCORM format. If your file is already a SCORM file, then you can download a copy of it from the media library.

Open the product that you would like to convert and select **SCORM Export** from the Properties menu.

This will open the “Export as SCORM Package” page where you can click on the SCORM version you want your export to be in. A summary window with a notice of a successful export will pop up. Select **Click Here** to view the SCORM Library at the bottom of the window.

Regarding evaluations that are built in Informetica and then exported to SCORM using this tool:
All question formats, except essay questions, are exported into the SCORM file and the exported evaluation itself behaves like the original Informetica set up, including feedback, etc., if enabled.

Note that the export does not capture everything in a course, such as affidavits. When you use the export to SCORM tool, the system will give you a complete list of items that will not carry over in the export to SCORM.


Export as SCORM Package
You are viewing: Library > Products > Informetica Sample Course > Export as SCORM Package
Exporting this item will overwrite any pre-existing SCORM package with the name: Informetica Sample Course.zip
Some features supported within Informetica are not supported upon export. See below for details.
These features require functionality within Informetica and are not applicable within the SCORM reference modal.
Wikis and Mark up documents
The display text will be exported as HTML. Comments applied to mark up documents will not be exported. Wikis will be the most recent version and will be read only.
Assessments
Assessments are ignored and will not be exported.
Exports containing SCORM assets
SCORM packages will be ignored and will not be exported.
Integration dependent assets
If you system includes asset types which integrate with 3rd party systems, these assets will be ignored and not exported.
Prerequisites and Completion rules
these rules are ignored on export
Essay Questions
Essay style questions will be dropped from tests and will not be exported
Affidavits
Affidavits will be omitted from exported assets.
Export As:
Static HTML
SCORM 1.2
SCORM 2004
SCORM 2004 2nd Edition

17. Assignments, Modules and References

Topics Covered In This Chapter

17.1 Assignments

An assignment is an asset that has a grade weight and due date attached to it so they are automatically removed from the product list when they are past due. Assignments are typically used with Instructor Led Products and are used to grade an element of the product that is done off line. For example, for a specific course, an instructor may require participants to email a video to the instructor that must be graded before the course can be completed. In this manner, the instructor can enter a grade for the assignment so that all of the grades for the course are documented in Informetica.

17.1.1 Create an Assignment or Edit Details

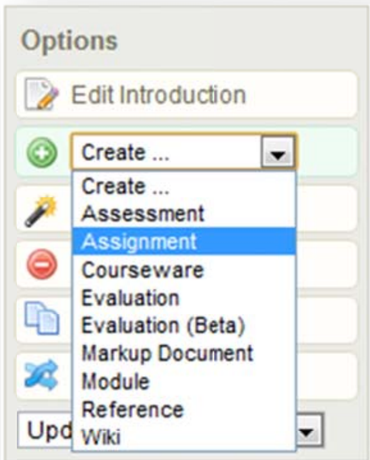
To fully create an assignment you will need to complete the following steps:

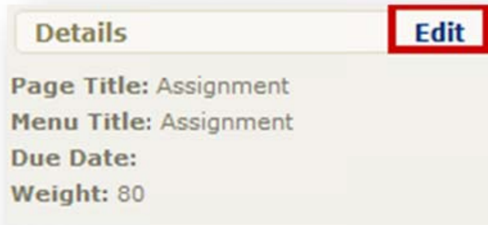
Step 1
- Create a assignment

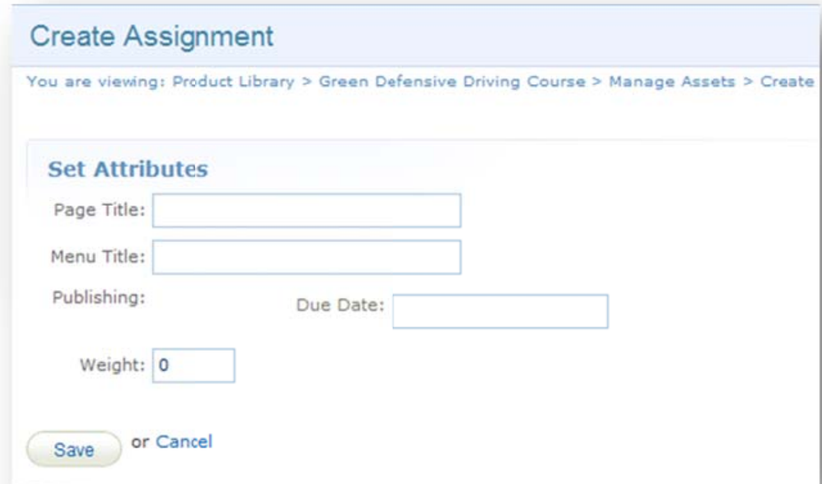
Step 2
- Set up assignment attributes and settings

Step 3
- Add assignment content

From a product's manage assets page, click on "create" under the options menu on the right and select assignment from the dropdown menu. To edit these details, click on "edit" in the details menu. Enter the details, as described below, and then save.





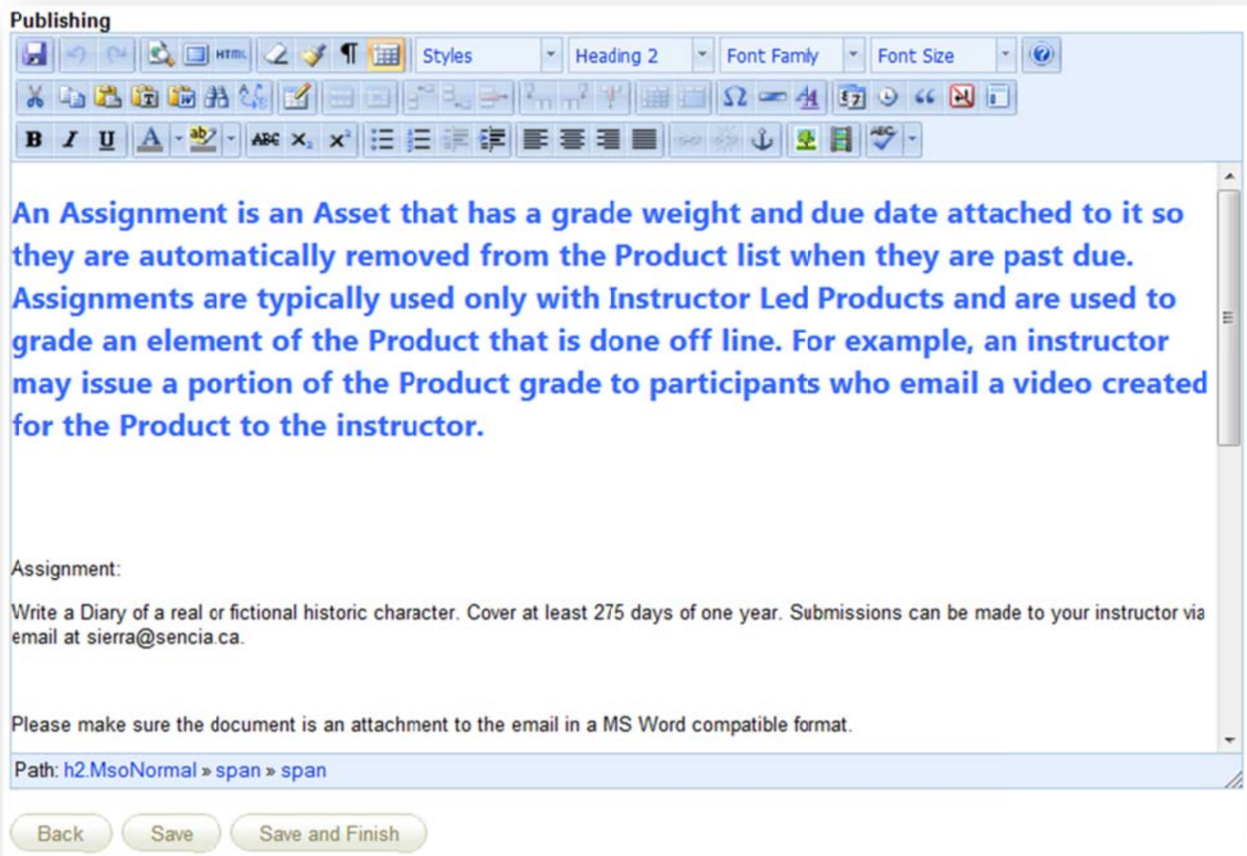


Below is a brief description of the fields:

Field	Description	Input
Page Title	Enter the name of the assignment. The page title will show up on the top of online content pages.	Required
Menu Title	The menu title is what shows in the assets list and in side menus. Note that menus have a limited amount of display; the longer your menu titles, the more cramped menu displays will be.	Required
Due Date	Enter a date if the participant must complete the assignment by a certain date.	Optional
Weight	Enter a percentage that the assignment is worth towards the entire product's grade, if applicable. Leave the default of 0 to indicate that there is no weight	Optional
Save	After saving, you will be brought to the manage assets page	Required

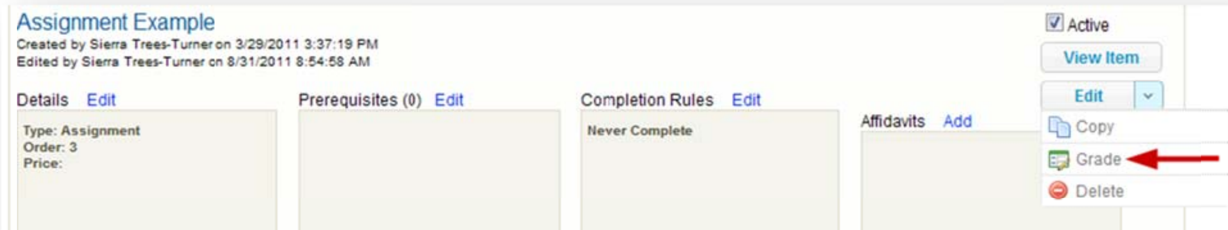
17.1.2 Add or Edit Assignment Content

From the manage assets page, click on the assignment in which you wish to edit or add content to. You will be brought the publishing window screen where you can design the text and content for the assignment. Click the save button to accept the content or click back to return to the manage assets page without saving. After saving, you will remain on the publishing window screen for the assignment.

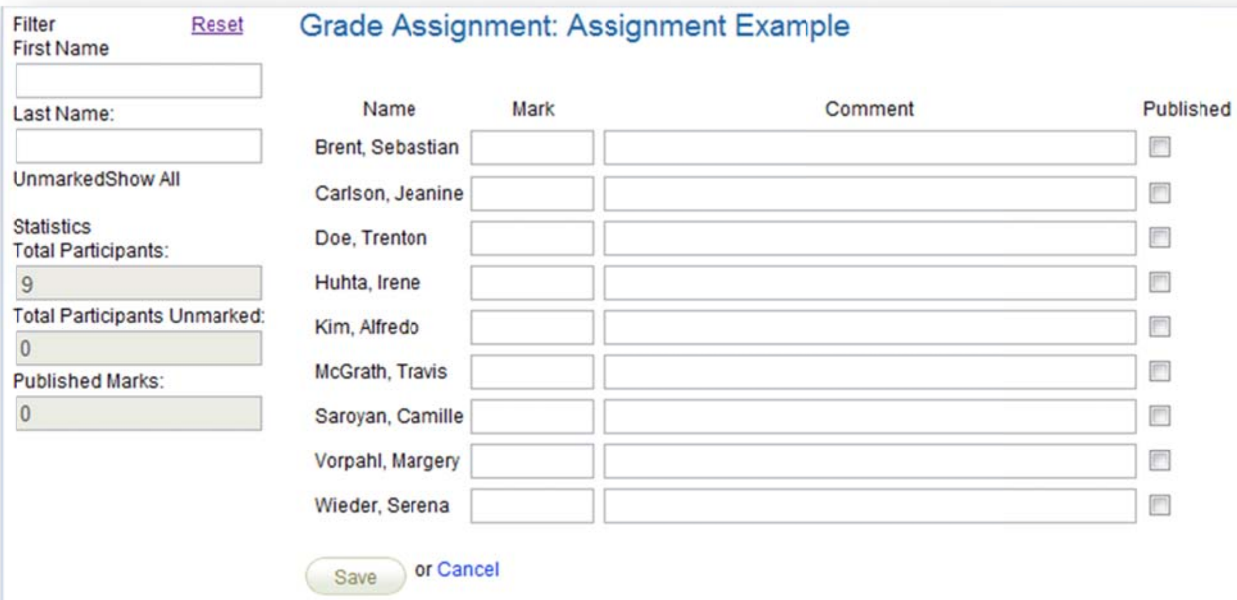


17.1.3 Grading an Assignment

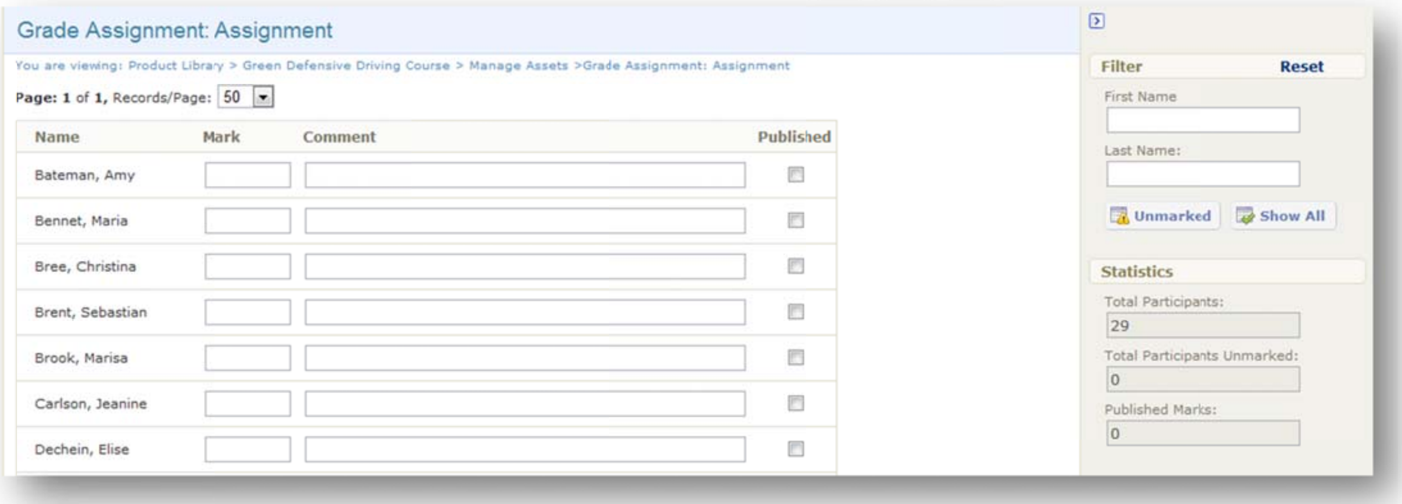
From the Manage Assets page, you can manually grade or override a grade for an assignment. Click on the grade button within the assignment's information box to open the grade screen where you can add a mark for individual participants, add comments and publish the grade so it will be displayed on the participant's transcript. You can use the filter on the right to see only participants who have not been graded yet or to enter a specific name.



Desktop View



Site Manager View



Below is a brief description of the fields:

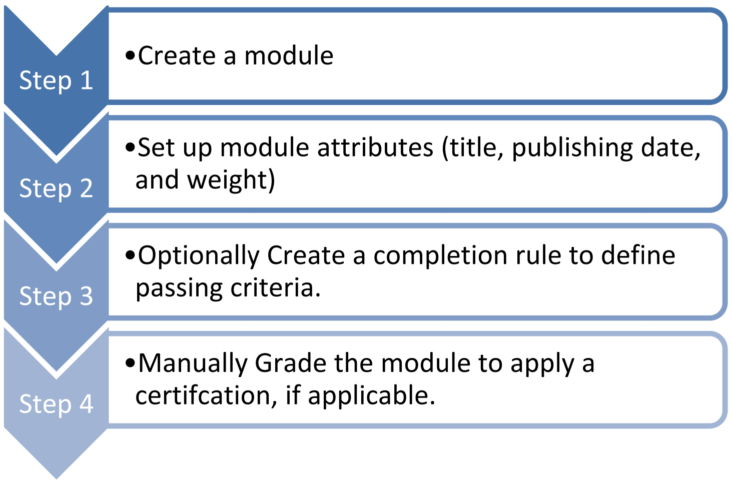
Field	Description	Input
Mark	Enter a grade or mark next to the participant's name for this assignment.	Required
Comment	Write a comment if desired.	Optional
Published	Select the check box under published if you want the grade to be reflected on that participant's transcript.	Optional
Filter	Type in a first name or last name to filter the grade list. Click the Reset link to clear all any filter.	Optional
Unmarked	Click the Unmarked button to see all participants who have not yet been graded for this assignment.	Optional
Show All	Click the Show All button to see both marked and unmarked participants.	Optional
Statistics	This area shows how many participants there are for this assignment, how many have already been marked, and the number that remain unmarked.	N/A
Save	Click the save button to ensure that any grades you entered are updated.	Required

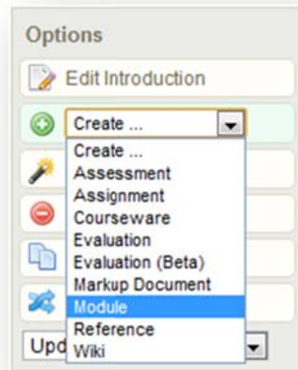
17.2 Modules (Lessons)

Modules typically contain the lesson portion of a product. Modules can be assigned a deadline, grade weights, publishing dates, and certifications. Modules can contain any of the supported file types, including videos.

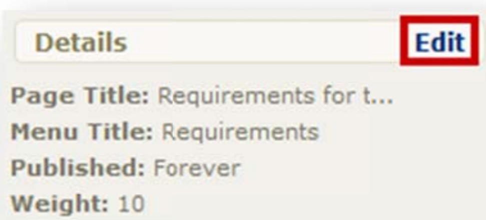
17.2.1 Create a Module or Edit Details

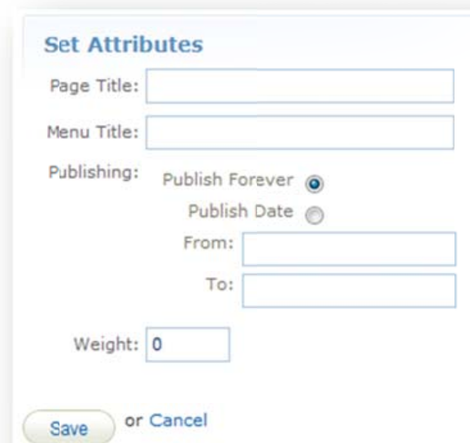
To fully create a module you will need to complete the following steps:





From the manage assets page, click on create under the options menu on the right and select module from the drop down menu. To edit these details, click on edit next to the details column on the right. Enter the details for the set attritbutes page and then save.

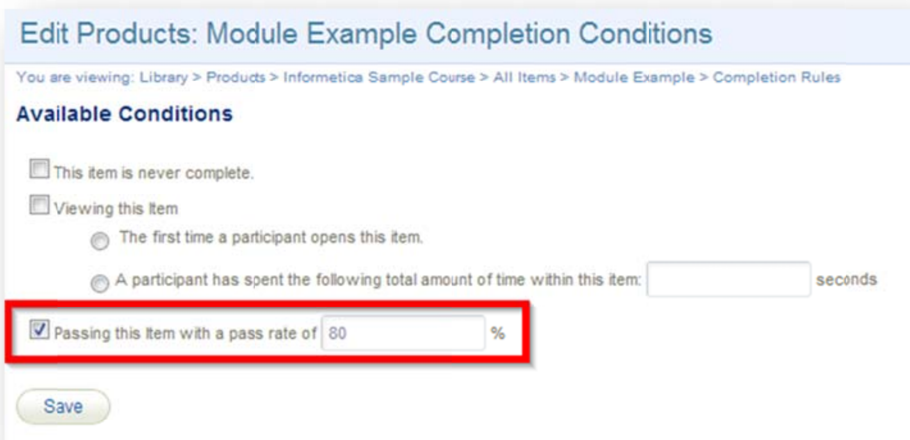




Below is a brief description of the fields:

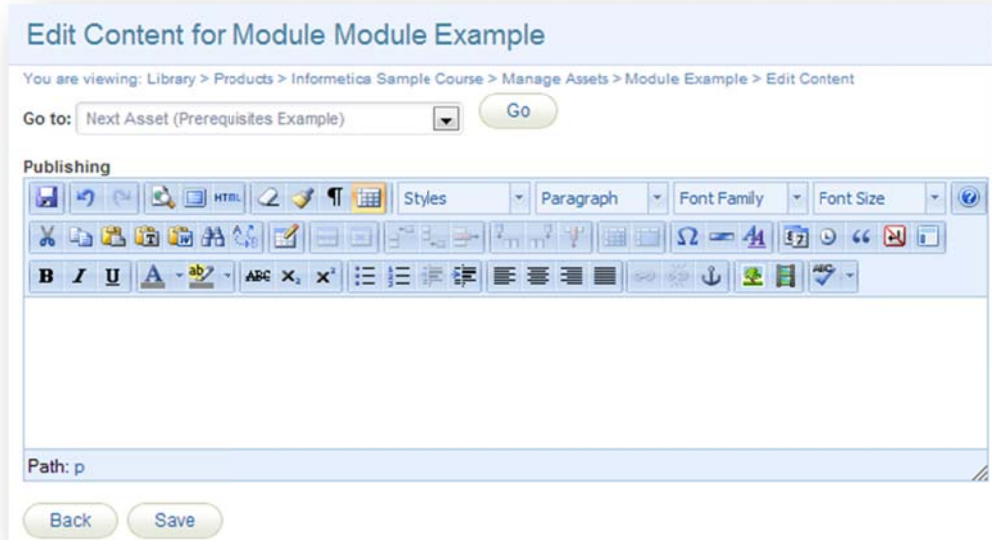
Field	Description	Input
Page Title	Enter the name of the module. The page title will show up on the top of online content pages.	Required
Menu Title	The menu title is what shows in the assets list and in side menus. Note that menus have a limited amount of display; the longer your menu titles, the more cramped menu displays will be.	Required
Publish Date	Select publish forever if you want the module to be always available or select a specific publish date if your module will be unavailable during or before a certain date. A module that is published forever is available to all participants with access. A module that is published for specific dates is also available to all participants with access, but only during the published dates. If the module falls before or after the published dates, registered participants would no longer see it.	Optional
Weight	Enter a percentage that the Module is worth towards the entire product's grade, if applicable. Leave the default of 0 to indicate that there is no weight.	Optional
Save	After saving, you will be brought to the manage assets page.	Required

Set up a completion rule to define the passing rule for the module. If you want to apply a passing grade or a certification, this step is required. Here is an example:



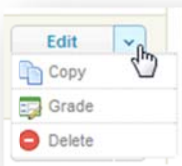
17.2.2 Add or Edit Module Content

From the manage assets page, open the module you wish to add or edit content for and design the content in the publishing window. Click the save button to keep the changes or click the back button to return to the manage assets page without keeping the changes.



17.2.3 Grade a Module

Navigate to a product's Manage Assets page and then select the down arrow next to the Edit button. Choose grade and then apply the grade to the appropriate participant.



17.2.4 Module Certifications

Modules can also apply to certifications. Modules must be graded manually, so keep in mind that participants will not receive the certification until an Instructor, Publisher, Campus Admin, or Site Manager applies a grade to the module. Here is a list to help you set a module up for certification:

- Create a completion rule to define the passing criteria.
- When creating the certification, create a rule that includes passing the module.

17.3 References

References are assets within a product that are always available. They often contain resources for the participants such as external links, a relevant glossary of terms or can be used as a landing page for the product. Reference pages can even be linked to from other pages or set up as popup windows throughout the product to be used as in-product help tools.

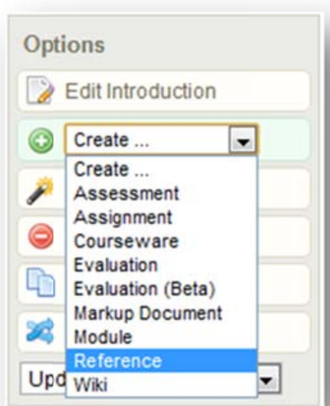
To fully create a reference you will need to complete the following steps:

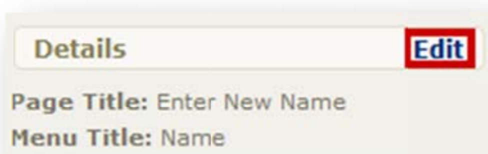
Step 1
- Create a reference

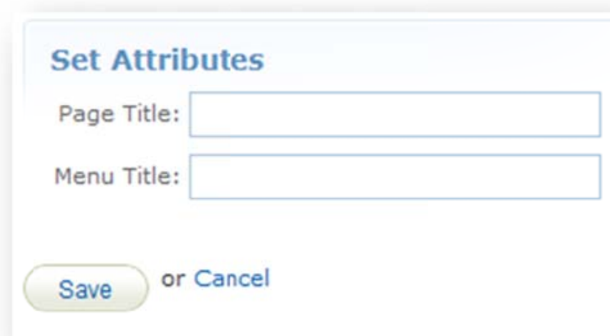
Step 2
- Set up reference attributes and settings

17.3.1 Create a Reference or Edit Details

From the Manage Assets page, click on create under the options menu and select reference from the drop down menu. To edit these details, click on edit next to the details column on the right. Enter the details and then save.





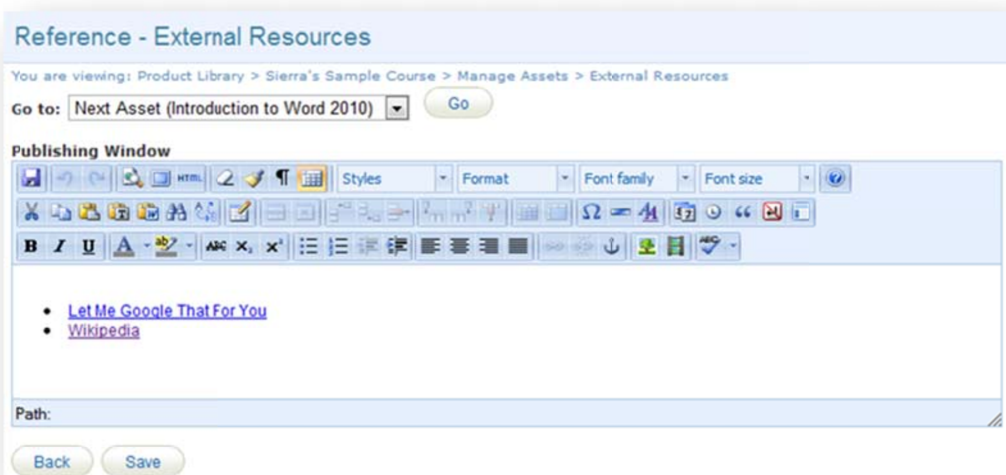


Below is a brief description of the fields:

Field	Description	Input
Page Title	Enter the name of the reference. The page title will show up on the top of online content pages.	Required
Menu Title	The menu title is what shows in the assets list and in side menus. Note that menus have a limited amount of display; the longer your menu titles, the more cramped menu displays will be.	Required
Save	After saving, you will be brought to the Manage Assets page.	Required

17.3.2 Add or Edit Reference Content

From the manage assets page, open the reference you wish to add or edit content for and design the content in the publishing window. Click the save button to keep the changes or click the back button to return to the manage assets page without keeping the changes.



18. Evaluations

An evaluation is used to test a participant's knowledge of the content that you have provided. There are 7 different types of questions that can be used to create an evaluation: essay, fill in the blank, matching, multiple answer, multiple choice, ranking, and true or false. Informetica can automatically grade every type of question in an evaluation except for essays. Informetica's testing engine lets you create and edit tests or quizzes, applying the rules you need for a successful training and/or certification environment. You are able to apply passing grades, prerequisites, weights, randomize answer options, create question pools, test by section or by question, give feedback for correct and incorrect answers, offer a variety of question types and you are able to incorporate audio, video, graphics, external and internal links and more.

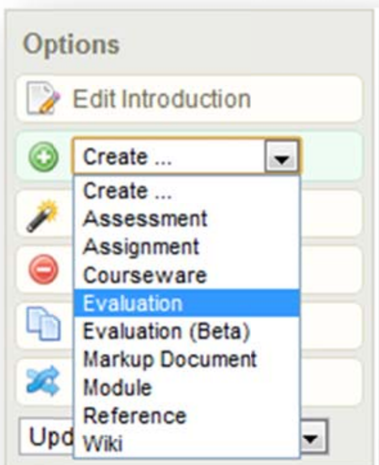
Topics Covered In This Chapter

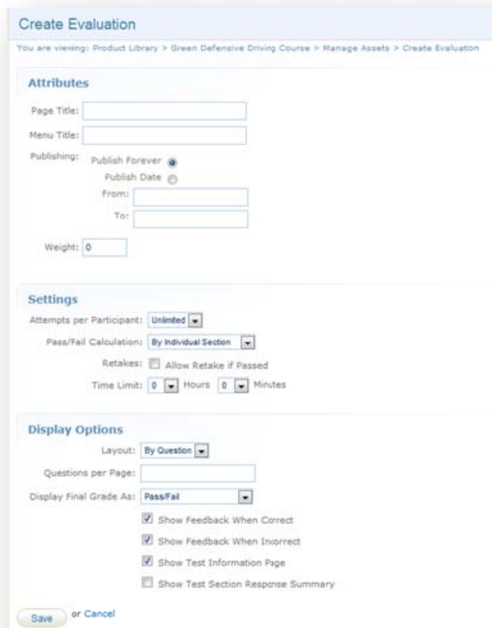
Create a New Evaluation

To fully create an evaluation you will need to complete the following steps:

- Step 1
  - Create an evaluation
- Step 2
  - Create one or more evaluation sections
- Step 3
  - Create evaluation questions within the sections

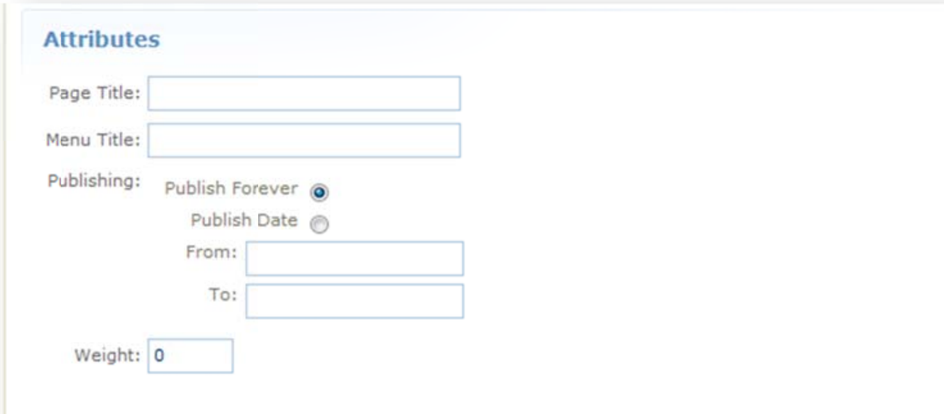
From the manage assets pages, select create from the options menu. Select **evaluation** from the dropdown menu to open the “Create Evaluation” page.





Once an evaluation is made available to participants, you will not be able to change the selections you made in the settings since it would affect anyone currently undergoing the evaluation. If you find you need to make changes, you can deactivate this evaluation and create a copy with the new settings and then set it up to replace this evaluation.

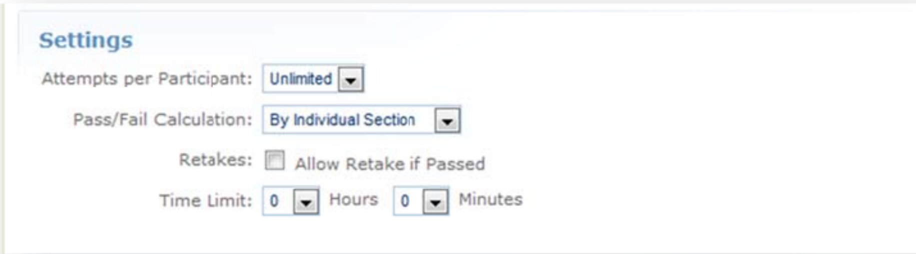
Evaluation Attributes



Below is a brief description of the fields:

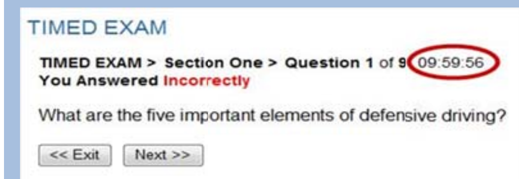
Field	Description	Input
Page Title	Enter the name of the evaluation. The page title will appear appears across the top of the page when this evaluation is open.	Required
Menu Title	Enter a name for the evaluation as it will appear in side menus, user transcripts, bread crumb trails, and reports. Menus have a limited display area, so long menu titles can make displays look cramped and untidy.	Required
Publishing Date	Select publish forever if you want the questionnaire to be always available or select a specific publish date if your questionnaire will be unavailable during or before a certain date. An evaluation that is published forever is available to all participants with access. An evaluation that is published for specific dates is also available to all participants with access, but only during the published dates. If the evaluation falls before or after the published dates, registered participants would no longer see the evaluation.	Required
Weight	Enter a percentage that the evaluation is worth towards the entire product's grade, if applicable.	Optional

18.1.1 Evaluation Settings



Below is a brief description of the fields:

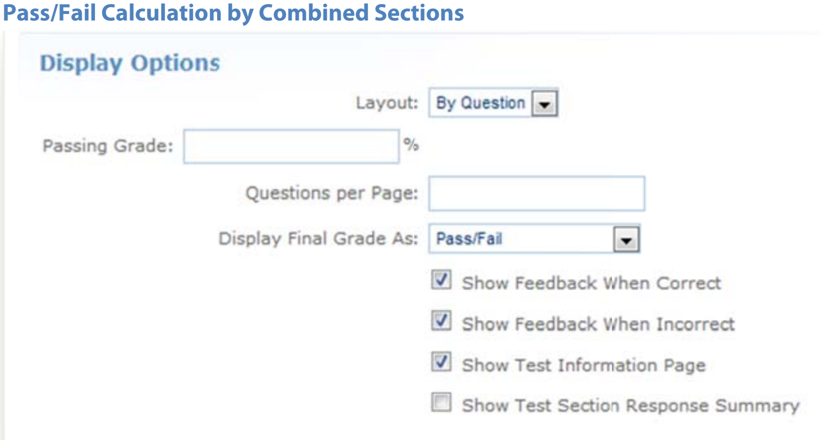
Field	Description	Input
Attempts per Participant	Select the number of times a participant is allowed to take this evaluation (1-5 attempts or unlimited).	Optional
Pass/Fail Calculation By	Use the drop down menu to select one: Combined Sections: Questions are scored and a percentage is determined against all questions in the test, regardless of how questions are grouped into sections. A single passing threshold is required for the evaluation. On retake, the participant must retake all questions. Individual Section: The questions within each section are graded and a percentage is determined for each section. A passing threshold is applied to each section within the evaluation and the participant has passed the evaluation once each section has been passed. On retakes, if the option to retake on pass is not enabled, the user will be only be presented with sections they have not passed.	Required
Retakes	When retakes is enabled in combination with a pass/fail calculation by individual sections, then a participant must answer the questions from all sections on a retake of the test, even if the sections were already passed. Exceptions created for evaluations that are set up by individual section and allow only 1 retake will allow participants to retake only failed sections. When retakes is enabled in combination with a pass/fail calculation by combined sections, then a participant may reattempt the test, assuming that the product itself allows retakes.	Optional

Field	Description	Input
Time Limit	You can restrict the length of time allowed to complete the evaluation. Set a time limit by selecting from the hours and minutes dropdown menus. The amount of time remaining will appear to the participant at the top of every question page in a countdown of numbers.  	Optional
Questions per Page	Enter the number of questions you want displayed on each page of the evaluation for the participant to see.	Optional

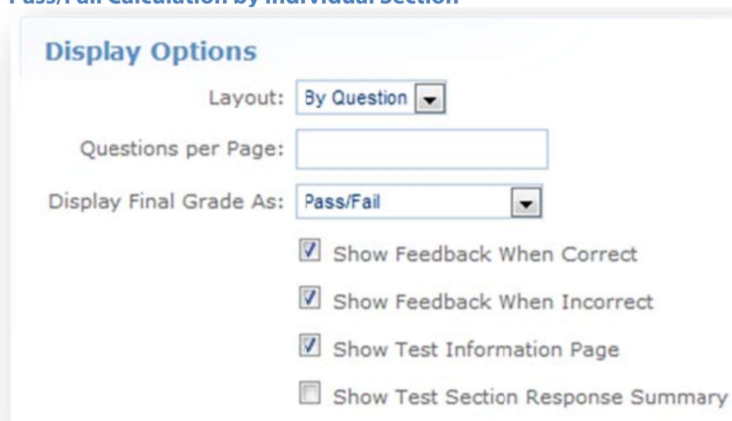
18.1.2 Display Options

The passing grade field will only appear if you have selected the pass/fail calculation by combined sections from the evaluations settings. Passing Grade for individual sections will be located in the section details.

Pass/Fail Calculation by Combined Sections

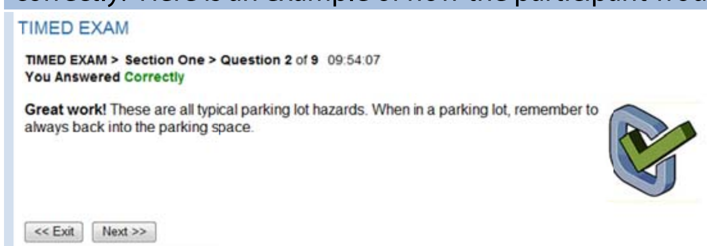


Pass/Fail Calculation by Individual Section

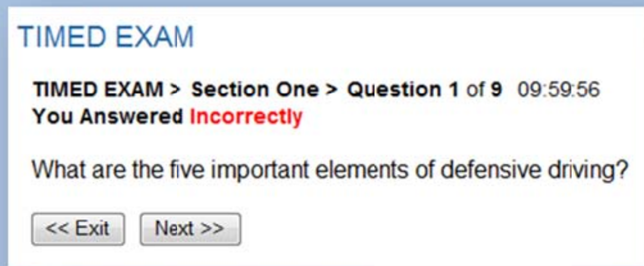


Below is a brief description of the fields:

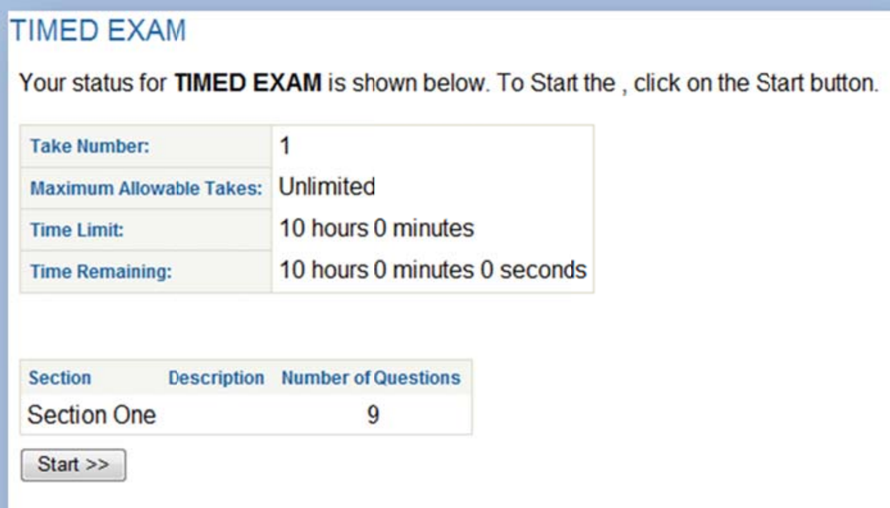
Field	Description	Input
Layout		Required
By Question:	Select this layout option if you would like the participant to see the evaluation only one question per page. If you select this layout, participants will see only one question at a time regardless of what is entered in the Questions per Page field. With the layout By Question option, only sequential question progression is possible during the evaluation.	
By Section:	Select this layout option if you would like the participant to see the evaluation questions in order, listed under section headings. With the layout By Section option, free navigation around the questions is possible during an evaluation.	
Passing Grade	Enter the grade required to pass this test. The passing grade field only shows if you have selected the pass/fail calculation by combined sections from the evaluations settings.	Required
Questions per Page	Enter the number of questions you want displayed on each page of the evaluation for the participant to see.	Required
Display Final Grade As	Use the drop down menu to choose how you would like the evaluation grade to be shown on participant transcripts upon completion as follows: • Complete/Incomplete: displays the evaluation's grade result as complete or not complete. • Grade Without Remarks: displays the evaluation's grade result numerical grade. This type of grade is also known as a score or mark. For example, an evaluation may have a maximum numerical value of 40 with a passing score of 30. If the participant earns 35 marks, 35 will appear on as a passing grade on the transcript. • Pass/Fail: displays the evaluation's grade result as an overall pass or fail result. • Percentage: displays the evaluation's grade result as a percentage. This is the default option.	Required
Show Feedback When Correct	Select this checkbox to display specific information to the participant when a question is answered correctly. Here is an example of how the participant would see this:	Optional



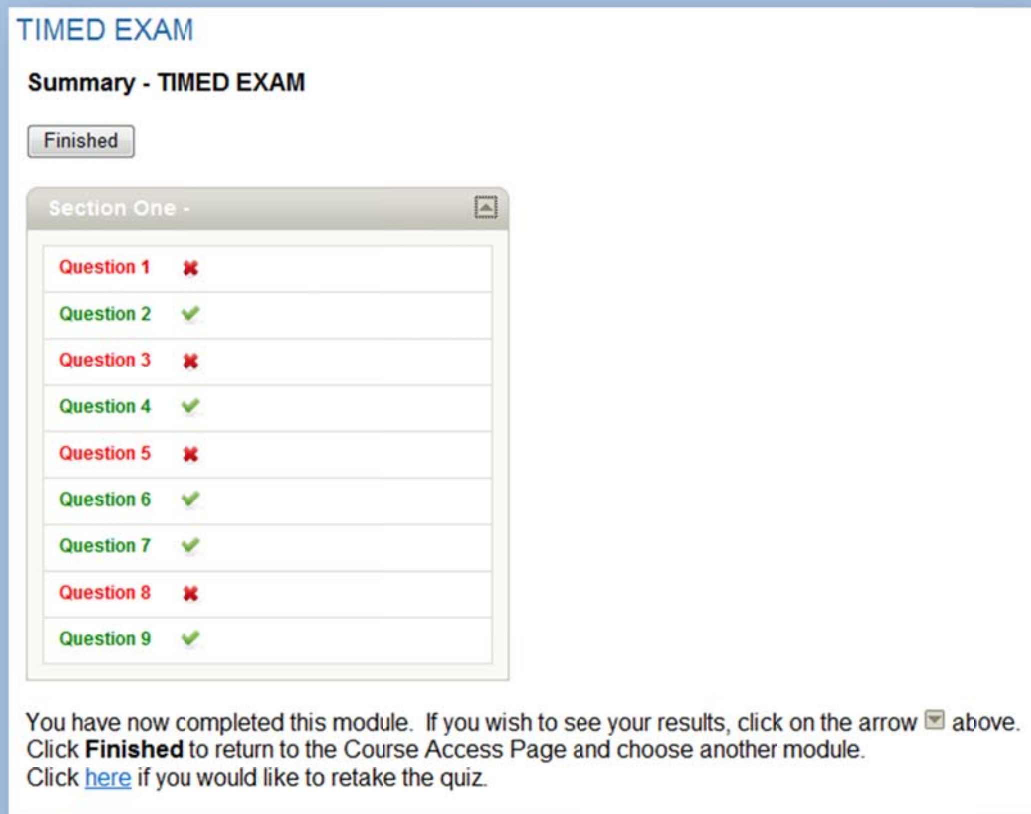
<table>
<tr><th>Field</th><th>Description</th><th>Input</th></tr>
<tr><td>Show Feedback When Incorrect</td><td>Select this checkbox to display specific information to the participant when a question is answered incorrectly. Here is an example of how the participant would see this:



</td><td>Optional</td></tr>
<tr><td>Show Test Information Page</td><td>Select this checkbox to show a summary of the evaluation to the participant after they begin evaluation but before the questions appear. Here is an example of how the participant would see this:



</td><td>Optional</td></tr>
</table>

Field	Description	Input
Show Test Section Response Summary	Select this checkbox to show the participant a summary of their answer results after completion of the evaluation. Here is an example of how the participant would see this: 	Optional
Save	This button will save your changes and create the new evaluation. Once you have saved the evaluation, you are brought to the manage assets page.	Required
Cancel	This button will return you to the manage assets page without creating a new evaluation.	Optional

18.1.4 Create an Evaluation Section

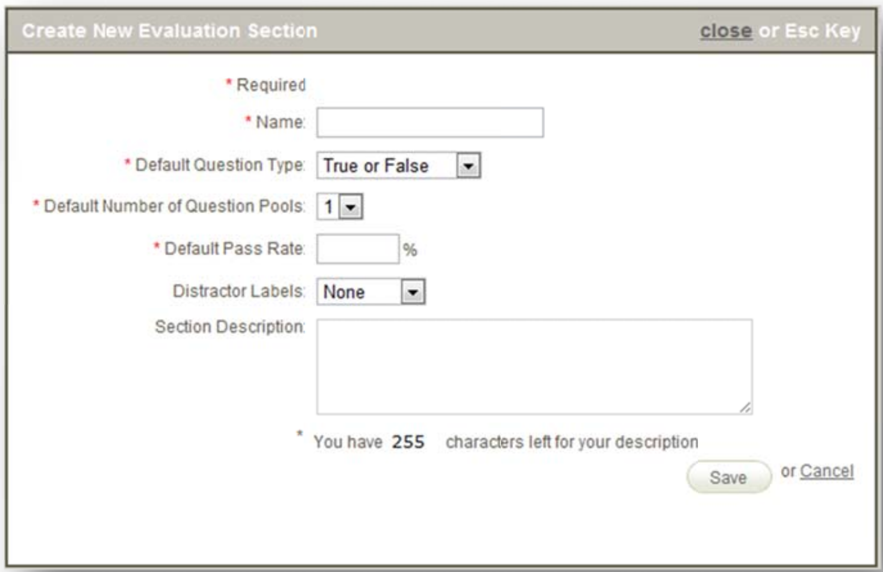
After you have created a new evaluation, you will need to create at least one section to hold your questions.

Every field indicated with a red asterisk * is required to create the section. Additionally, once an evaluation is made available to participants, you will no longer be able to add or edit section. However, you can edit the questions within the sections.

Open the evaluation. The sections that have been created are listed under the evaluation sections menu. Next to the name of each section is a number representing how many questions are within that section (9 in the example below).

Open the evaluation and click create next to the evaluation section, located on the left hand side to open the Create New Evaluation Section page.

You must make the Section active before Participants will be able to see it.



Below is a brief description of the fields:

Field	Description	Input
Name	Enter a name for the section.	Required
Default Question Type	Select a default type for the questions that you will be creating. The default does not limit you to the one question type; you can change individual question types later as you create them. For example, you may wish to have 10 questions and 6 of them will be multiple choice; multiple choice would be your best option for the default question type.	Required
Default Number of Question Pools	Select the number of question pools you want to use (1-5). A question pool is a collection of questions from which only one will appear in the evaluation. You can provide up to 5 alternate versions of each evaluation question. As participants take the evaluation, each question is randomly selected from the current question's available pool and presented to the participant. In this way, different participants taking the same evaluation will not necessarily be answering the same evaluation questions. If you have a single pool for all questions, all participants would answer the same set of questions.	Required
Default Pass Rate (%)	Enter the percentage that a participant must achieve in success answers to pass this section of the evaluation. This field will only appear if you have selected a pass/fail calculation by individual section in the evaluation settings.	Required
Section Description	Add an optional description of this Section Description.	Optional
Save	This button will save your changes and create the new section. Once you have saved the section, you are brought to the publishing window for the evaluation.	Required
Cancel	This button will return you to the publishing window for the evaluation without creating a new section.	Optional

18.1.5 Create a Custom Introduction

An evaluation has a default introduction page that shows the participant the name of the evaluation and a start button. From the manage assets page, open the evaluation in which you would like to create the custom introduction. This will bring you to a publishing window where you can customize an introduction to the evaluation.

18.2 Evaluation Questions

Informetica has a variety of questions types that can be used in any combination in evaluations. Every question type can be automatically graded by the system with one exception; essays must be graded manually.

18.2.1 Question Types

Essay questions require participants to write and submit a longer test answer. Essay questions cannot be automatically graded.

Fill in the Blank questions require the participant to type a short answer into a blank field within the question. There is only one correct answer to this type of question and all answers must be correctly spelled to be counted as correct.

Matching questions require the participant to correctly match the terms or statements on one list with the terms or statements on another list. There is only one correct answer to this type of question since all items must be correctly matched.

Multiple Answer questions allow participants to choose more than one answer. There is only one correct answer to this type of question since partially correct answers are considered incorrect.

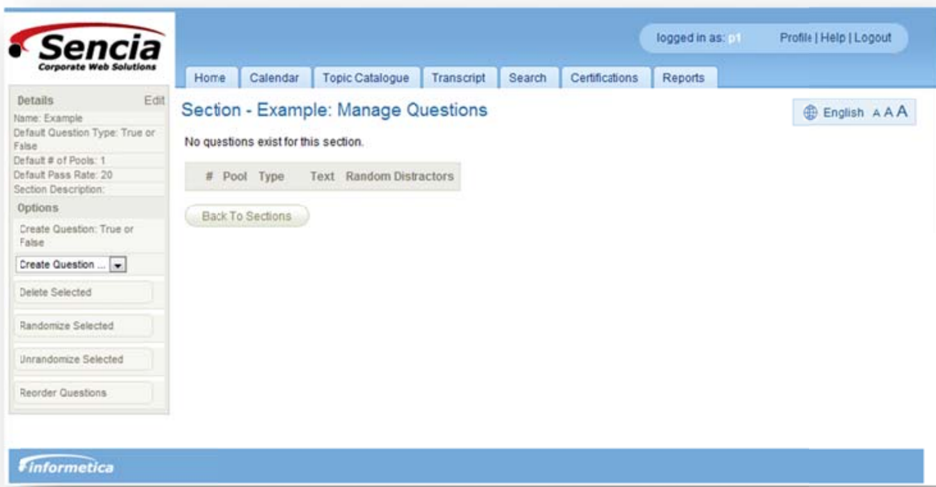
Multiple Choice questions requite the participant to select the correct answer from several offered choices. There is only one correct answer to this type of question since all items that are correct must be selected.

Ranking questions require participants to put all items in the correct rank. There is only one correct answer to this type of question since all items must be correctly ordered.

True or False questions force a participant to choose one of only two possible answers: true or false. There is only one correct answer to this type of question since only one statement is the correct answer.

18.2.2 Creating Questions

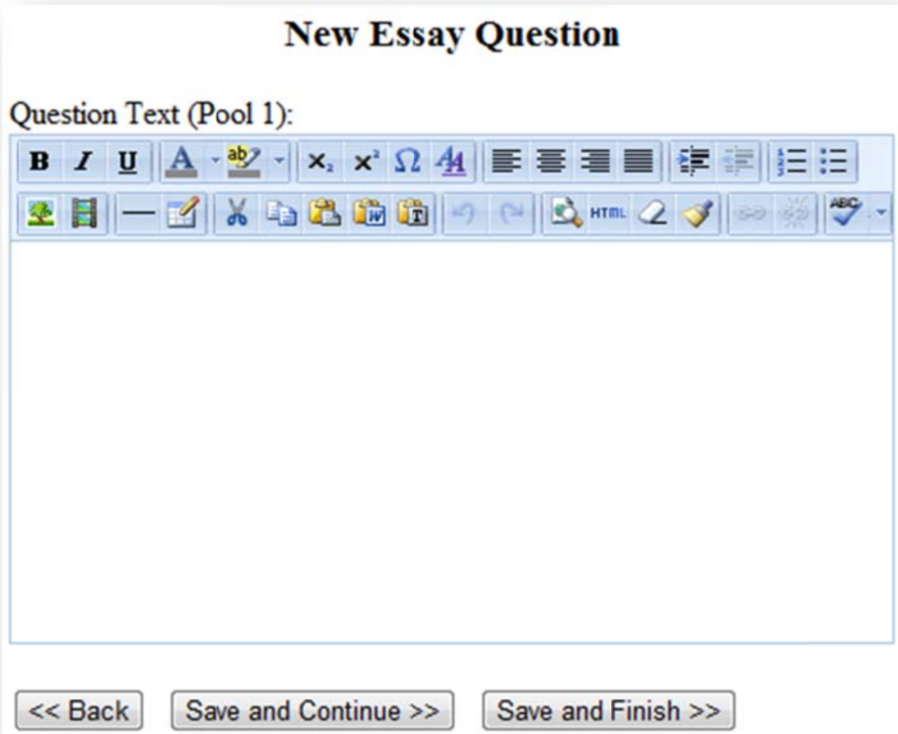
Questions are assigned an automatic number as you create them. This is the default order in which they are presented during an evaluation. In the evaluations section menu on the left, click the name of the section to open the manage questions page.



On the Options menu, click the **Create Question** dropdown menu to select a question type (essay, fill in the blank, matching, multiple answer, multiple choice, ranking or true or false). Next, find the type of question you want to create below and follow the instructions under that question type.

Create Essay Questions

Essay questions require participants to write and submit an answer in their own words. Essay questions cannot be automatically graded. First, follow the steps under Create Evaluation Questions.



Question Text: – Use the publishing window to design the question using whatever text and supporting files you want.

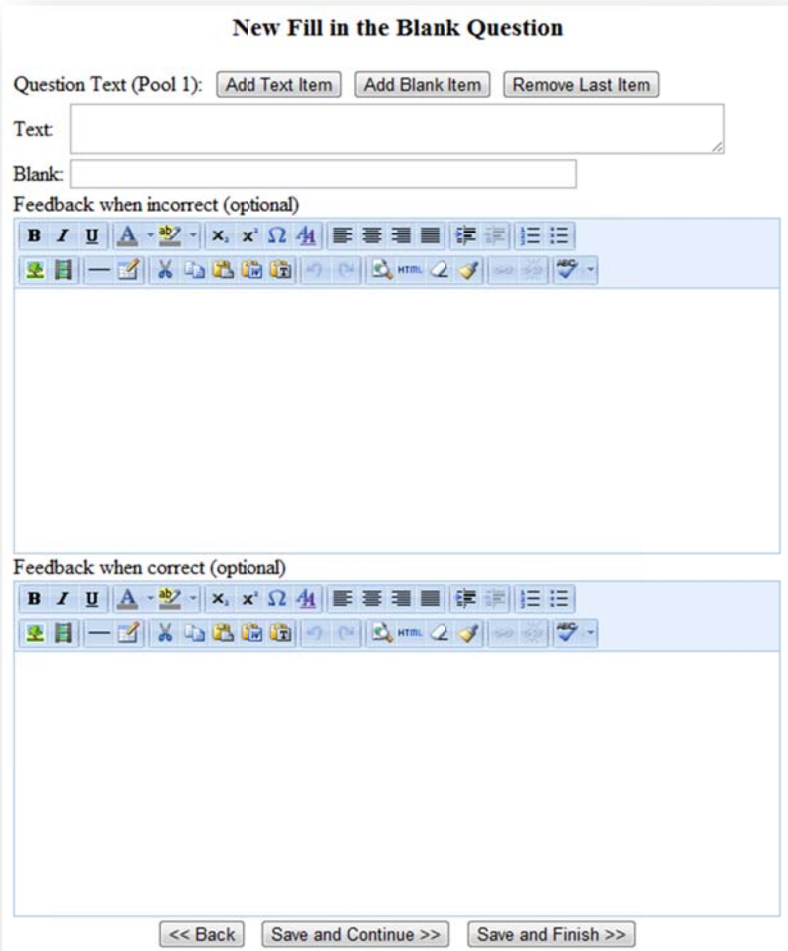
Back: This button will return you to the manage questions page without saving the question.

Save and Continue: This button will save the question and immediately let you create another essay question.

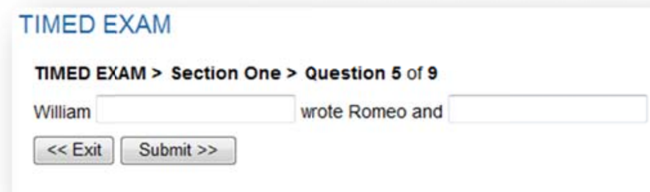
Save and Finish: This button will save the essay question and return you to the manage questions page.

Create Fill in the Blank Questions

Fill in the blank questions require the participant to type a short answer into a blank field within the question. There is only one correct answer to this type of question and all answers must be correctly spelled, although they do not need to be case sensitive, to be automatically graded as correct. However, if needed, a site manager can go into the participant's account and override the grade. First, follow the steps under Create Evaluation Questions.



Here is an example of how this question would look for the participant. The participant needs to enter text into the blank fields.



Text: Text is the portion of the question that the participant will see. Select "Add Text Item" to include more than one visible element to the question.

Blank: This is the portion of the question that the participant will fill in when taking the evaluation. Select "Add Blank Item" to have more than one blank in the question. Select "Remove Last Item" to remove the last Text or Blank added to the question.

Feedback: - use the publishing windows to write optional feedback for correct and incorrect answers.

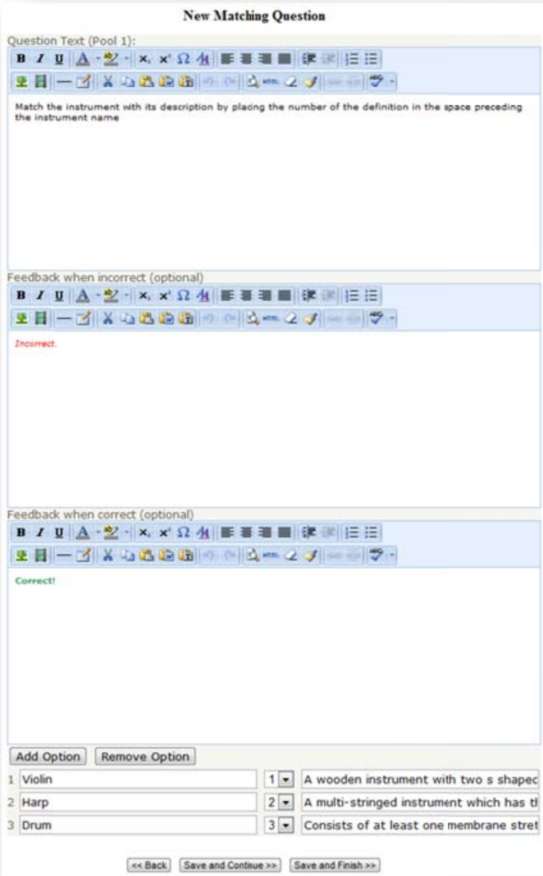
Back: This button will return you to the manage questions page without saving the question.

Save and Continue: This button will save the question and immediately let you create another fill in the blank question.

Save and Finish: This button will save the question and return you to the manage questions page.

Create Matching Questions

Matching questions require the participant to correctly match the terms or statements on one list with the terms or statements on another list. There is only one correct answer to this type of question since all items must be correctly matched. First, follow the steps under Create Evaluation Questions.



Question Text: Use the publishing window to design the question using whatever text and supporting files you want.

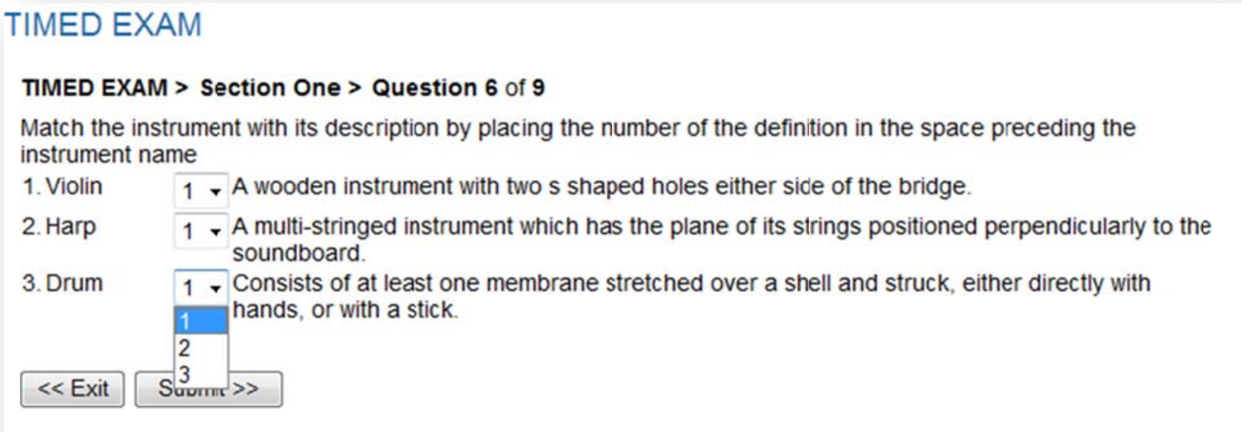
Feedback: - use the publishing windows to write optional feedback for correct and incorrect answers.

Add Option: Click this button to create more matches.

Remove Option: To remove one of the matches, click the match you want to remove and then click the Remove Option button.

Create Matches:

- Next to each number at the bottom, type in the text for an item that will be matched.
- Select a number from the dropdown menu. This number will be what the participant selects for the correct match.
- To the right side of the number, type in the answer text for the correct match.
- Below is an example of how this question would look for the participant. The participant needs to select a number from the dropdown menu to match the answers on the right to the correct numbered questions on the left.

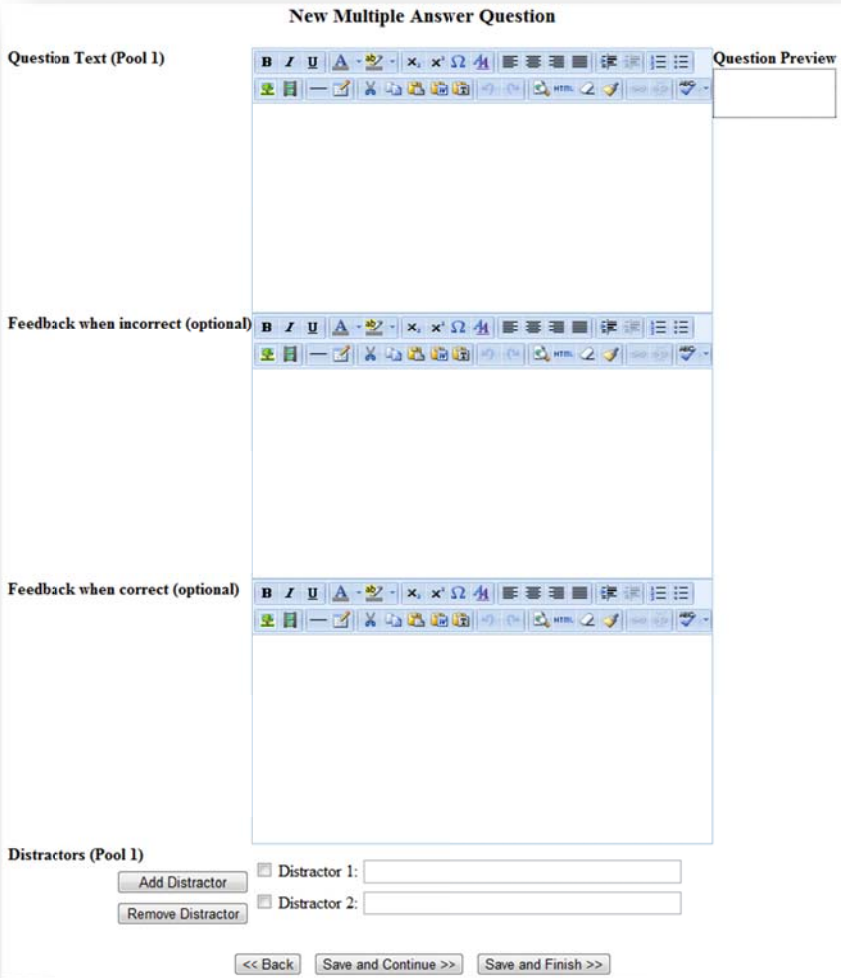


Back: This button will return you to the manage questions page without saving the question.

Save and Continue: This button will save the question and immediately let you create another matching question.

Save and Finish: This button will save the question and return you to the manage questions page.

Create Multiple Answer Questions



Multiple answer questions allow participants to choose more than one answer. There is only one correct answer to this type of question since partially correct answers are considered incorrect. First, follow the steps under Create Evaluation Questions.

Question Text: Use the publishing window to design the question using whatever text and supporting files you want.

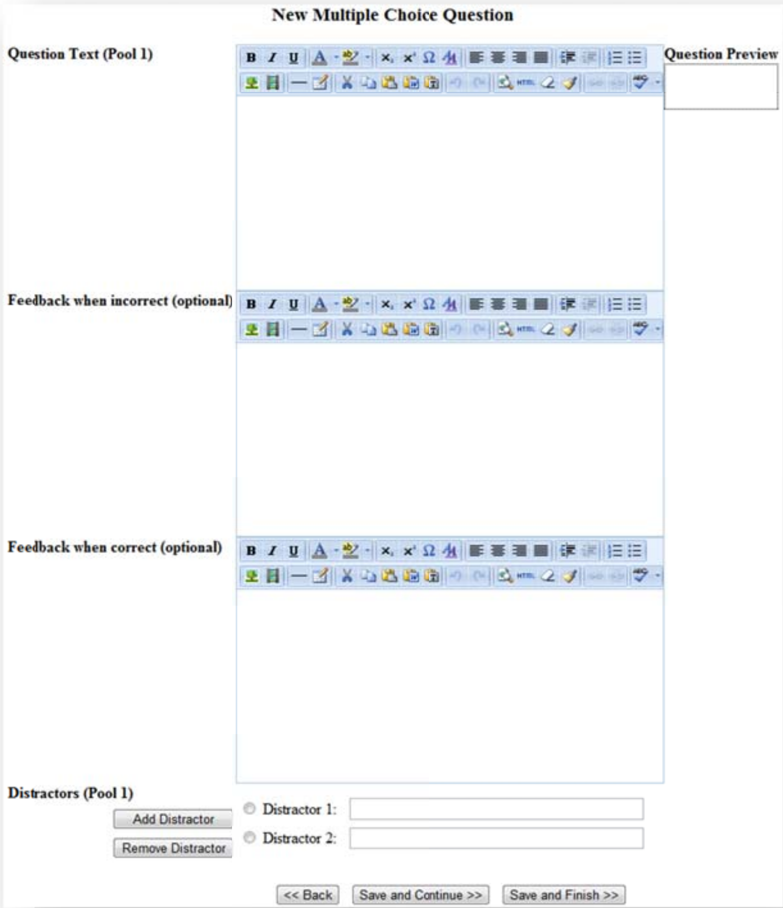
Feedback: - use the publishing windows to write optional feedback for correct and incorrect answers.

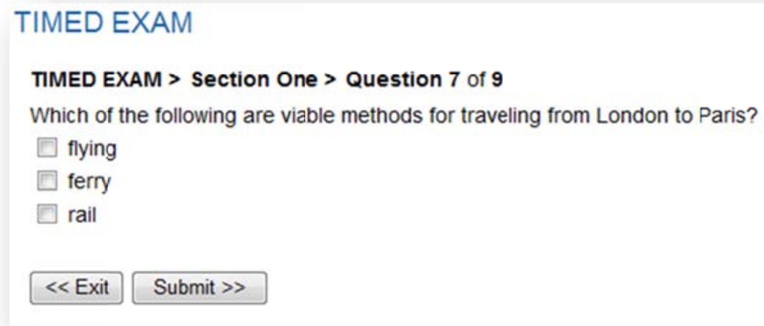
Distractors: Distractors are the list of answers offered as choices for the participant. For the answers that are correct selections, ensure that the box in front of the distractor is checked.

- Add Distractor: click this button to add another answer option.
- Remove Distractor: To remove an option, click the option you want to remove and then click the Remove Distractor button.

Question Preview: The box at the top right shows you how the question will look to the participant.

Here is an example of how this question would look for the participant. The participant needs to select each item that correctly answers the question.





Back: This button will return you to the manage questions page without saving the question.

Save and Continue: This button will save the question and immediately let you create another multiple answer question.

Save and Finish: This button will save the question and return you to the manage questions page.

Create Multiple Choice Questions

In Multiple choice questions, participants must select the correct answer from several offered choices. There is only one correct answer to this type of question since all items that are correct must be selected. First, follow the steps under Create Evaluation Questions.

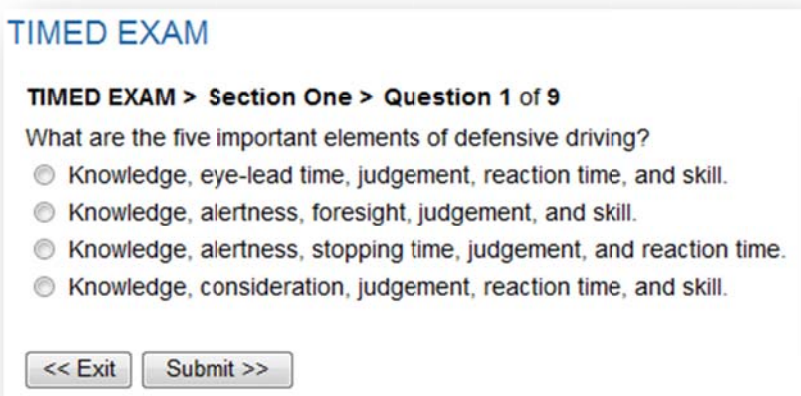
Question Text: Use the publishing window to design the question using whatever text and supporting files you want.

Feedback: - use the publishing windows to write optional feedback for correct and incorrect answers**.**

Distractors: Distractors are the list of answers offered as choices for the participant. For the answers that are correct selections, ensure that the radial buttons in front of the distractors are selected.

- Add Distractor: click this button to add another answer option.
- Remove Distractor: To remove an option, click the option you want to remove and then click the Remove Distractor button.

Question Preview: The box at the top right shows you how the question will look to the participant. Here is an example of how this question would look for the participant. The participant needs to select the one correct answer.



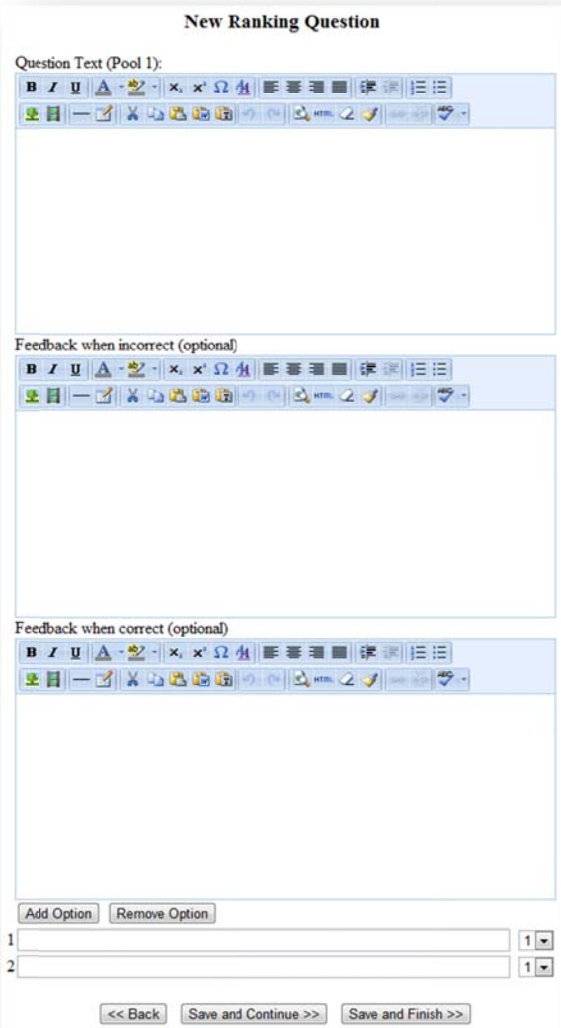
Back: This button will return you to the manage questions page without saving the question.

Save and Continue: This button will save the question and immediately let you create another multiple choice question.

Save and Finish: This button will save the question and return you to the manage questions page.

Create Ranking Questions

A ranking question requires participants to put all items in the correct rank. There is only one correct answer to this type of question since all items must be correctly ordered. First, follow the steps under Create Evaluation Questions.



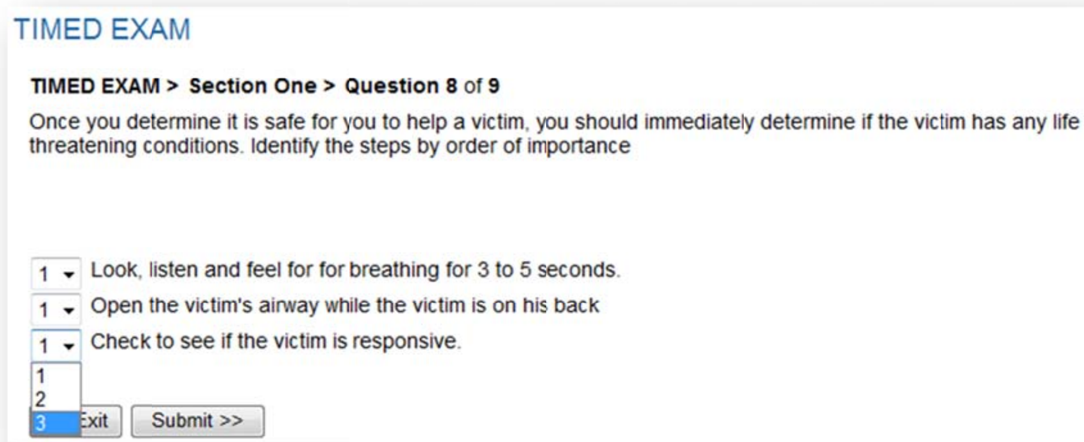
Question Text: Use the publishing window to design the question using whatever text and supporting files you want.

Feedback: - use the publishing windows to write optional feedback for correct and incorrect answers.

Add Option: Click this button to create more items to rank.

Remove Option: To remove one of the items, click the item you want to remove and then click the Remove Option button.

Here is an example of how this question would look for the participant. The participant needs to select a number to represent the order in which these items should occur.



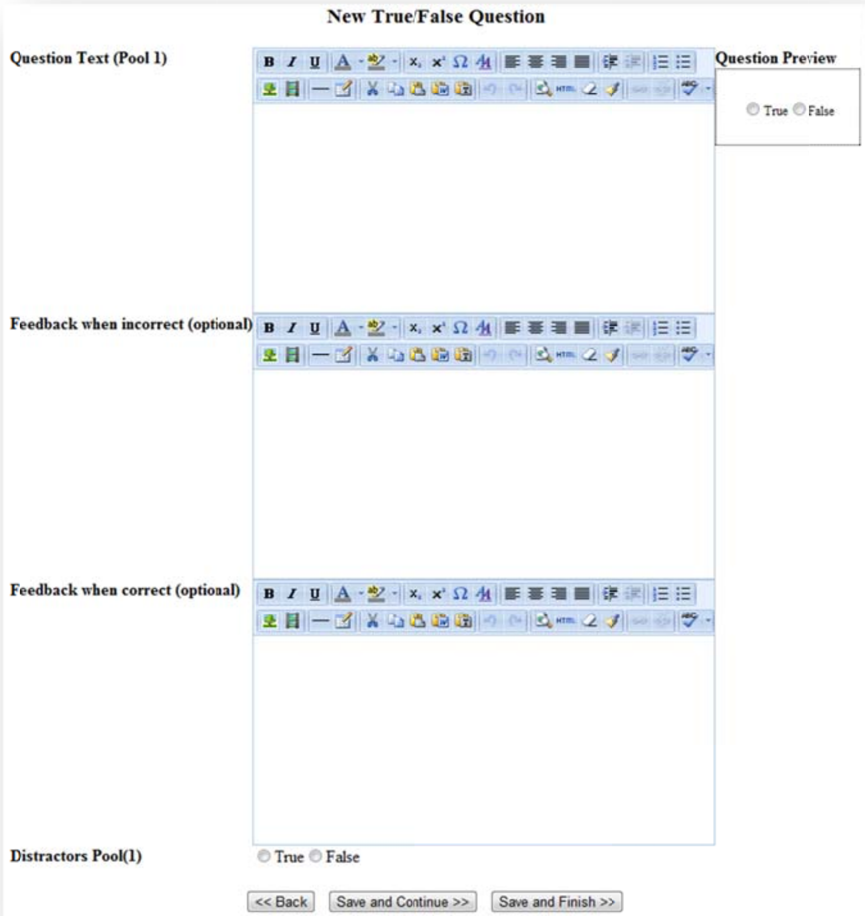
Back: This button will return you to the manage questions page without saving the question.

Save and Continue: This button will save the question and immediately let you create another ranking question.

Save and Finish: This button will save the question and return you to the manage questions page.

Create True or False Questions

True or false questions force a participant to choose one of only two possible answers: true or false. There is only one correct answer to this type of question since only one statement is the correct answer. First, follow the steps under Create Evaluation Questions.



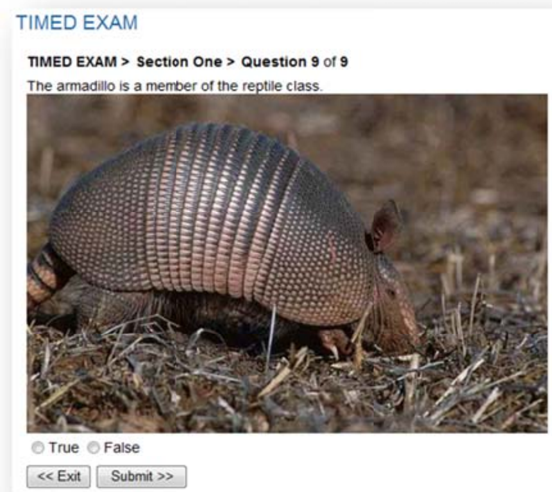
Question Text: Use the publishing window to design the question using whatever text and supporting files you want.

Feedback: - use the publishing windows to write optional feedback for correct and incorrect answers.

Distractors: Distractors are the list of answers offered as choices for the participant. For the answer that is the correct selection, ensure that radial button in front of the distractor is selected.

- Add Distractor: click this button to add another answer option.
- Remove Distractor: To remove an option, click the option you want to remove and then click the Remove Distractor button.

Question Preview: The box at the top right shows you how the question will look to the participant. Here is an example of how this question would look for the participant. The participant needs to select the one correct answer.



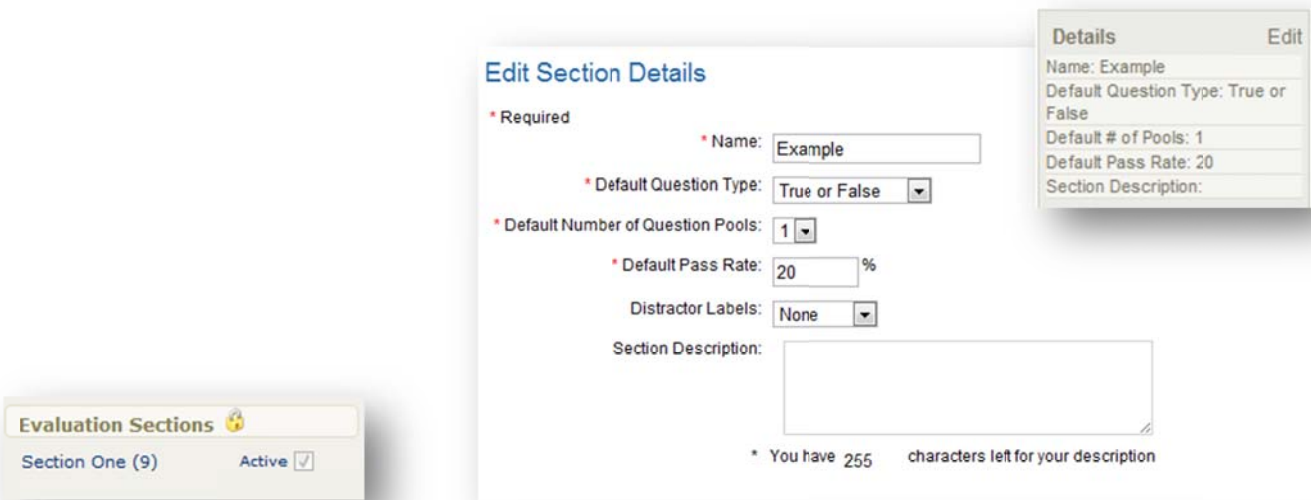
Back: This button will return you to the manage questions page without saving the question.

Save and Continue: This button will save the question and immediately let you create another true or false question.

Save and Finish: This button will save the question and return you to the manage questions page.

18.3 Edit Section Details

In the right hand side of the evaluation, click the name of the section that you wish to edit. Click **Edit i**n the details column on the right hand side of the section. This will open the edit section details page showing the initial settings that were selected when the section was created. See the Create an Evaluation Section for details about the fields on this screen.



18.4 Edit Evaluation Questions

Click on the name of the evaluation section that you want to edit questions for. This will open the manage questions window. Click the Edit link next to the question you want to edit. This will open the edit page for the question. Make your changes and then save them.

Save: Save your changes and return to the manage questions page.

Cancel: Returns you to the manage questions page without saving your changes.

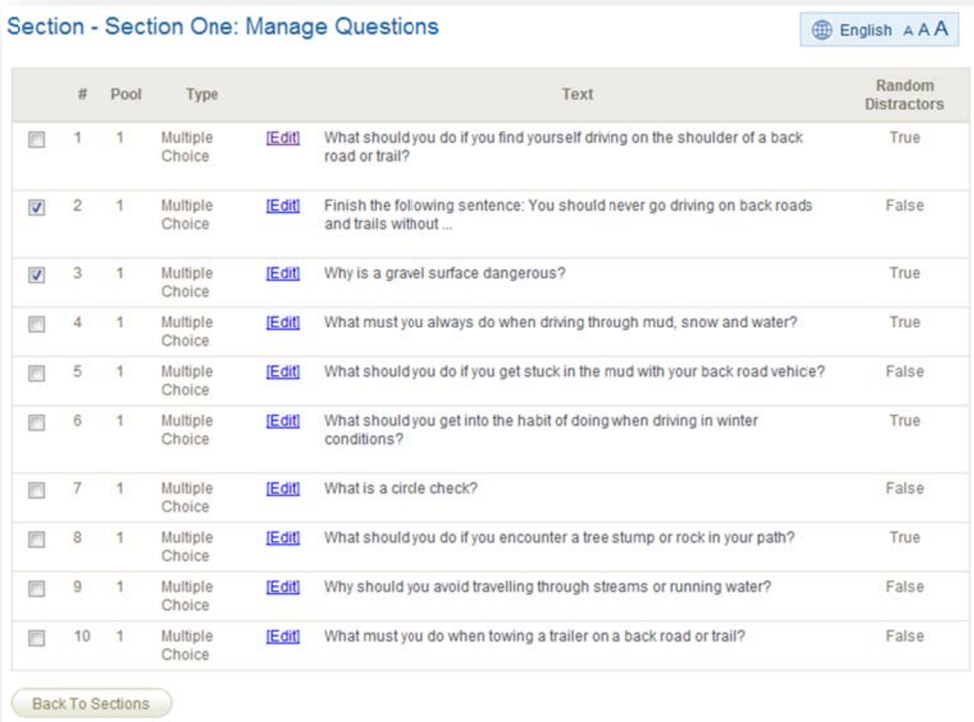
Manage Additional Information: Create a link to another relevant file within the product that participants will see linked at the bottom of the question.

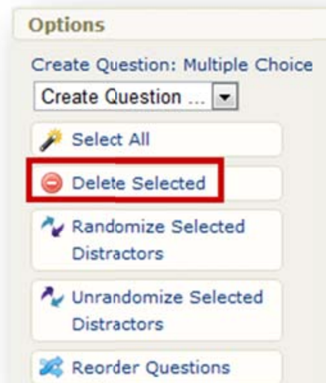
18.4.1 Manage Additional Information

When you edit an evaluation question, you also have the option of uploading additional materials, such as a video file to the question itself. Doing so will create a link to another relevant file within the product that participants will see linked at the bottom of the question. You can upload any file that is in your media library. Enter a title for the file, select if from the dropdown menu and then click the add link on the right. Make sure to click the active box so your Participants can see it – items that are not active will not be visible. To remove a file that has been uploaded, simply click the delete link that corresponds with the file. You do not have to click save to update the Manage Extra Content area.

18.4.2 Delete Evaluation Questions

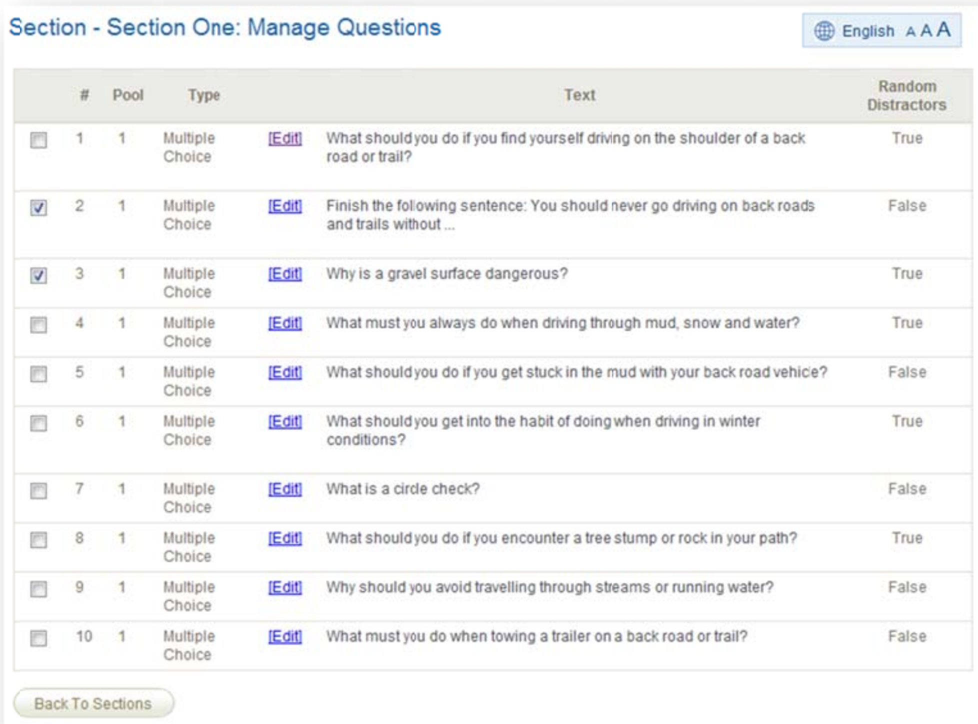
Click on the name of the evaluation section that you want to edit questions for. This will open the manage questions window. Select the questions you wish to delete using the checkboxes and then click **Delete Selected** from the options menu.





18.4.3 Randomize Evaluation Questions

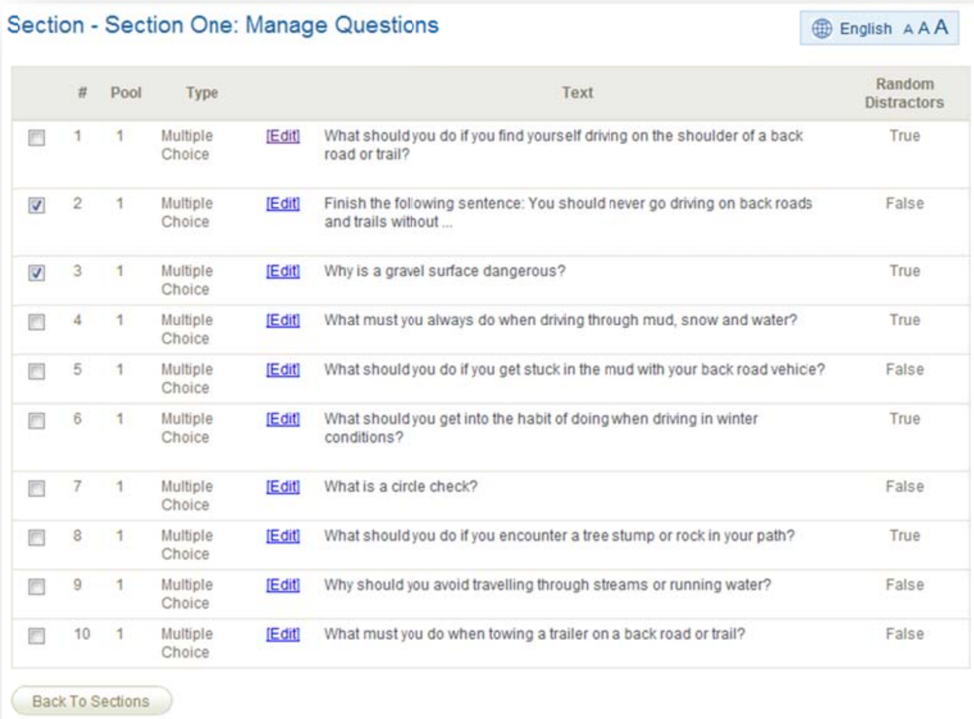
If you have created multiple pools, every question variation in that pool will have the same order number, but only one of them will randomly present during the evaluation. Instructions to randomize the order in which the questions are presented are later in this chapter under Managing Evaluation Section Questions.



Evaluation questions are assigned an automatic number as you create them. This is the default order in which they are presented during an evaluation. This is indicated by the # column as shown below. You can instead choose to have the questions presented in a random order. Click on the name of the evaluation section that you want to edit questions for. This will open the manage questions window. Select the questions you wish to randomize using the checkboxes and then click Randomize Selected from the Options menu.

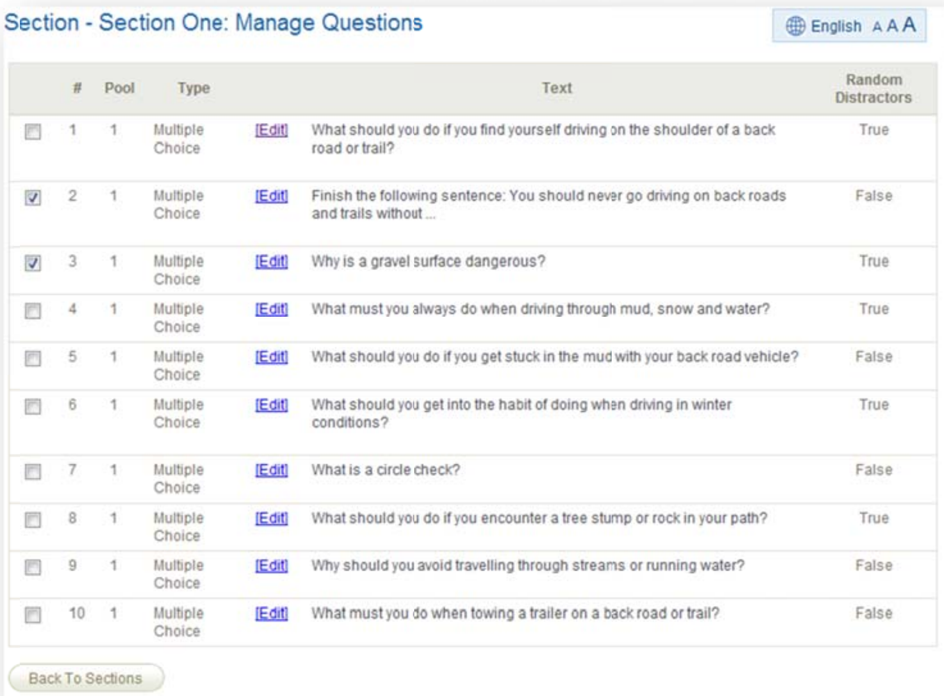
18.4.4 Unrandomize Evaluation Questions

Click on the name of the evaluation section that you want to edit questions for. This will open the manage questions window. Select the questions you wish to unrandomize using the checkboxes and then click **Unrandomize Selected** from the options menu. This will present the question in the default order indicated by the # column as shown below.

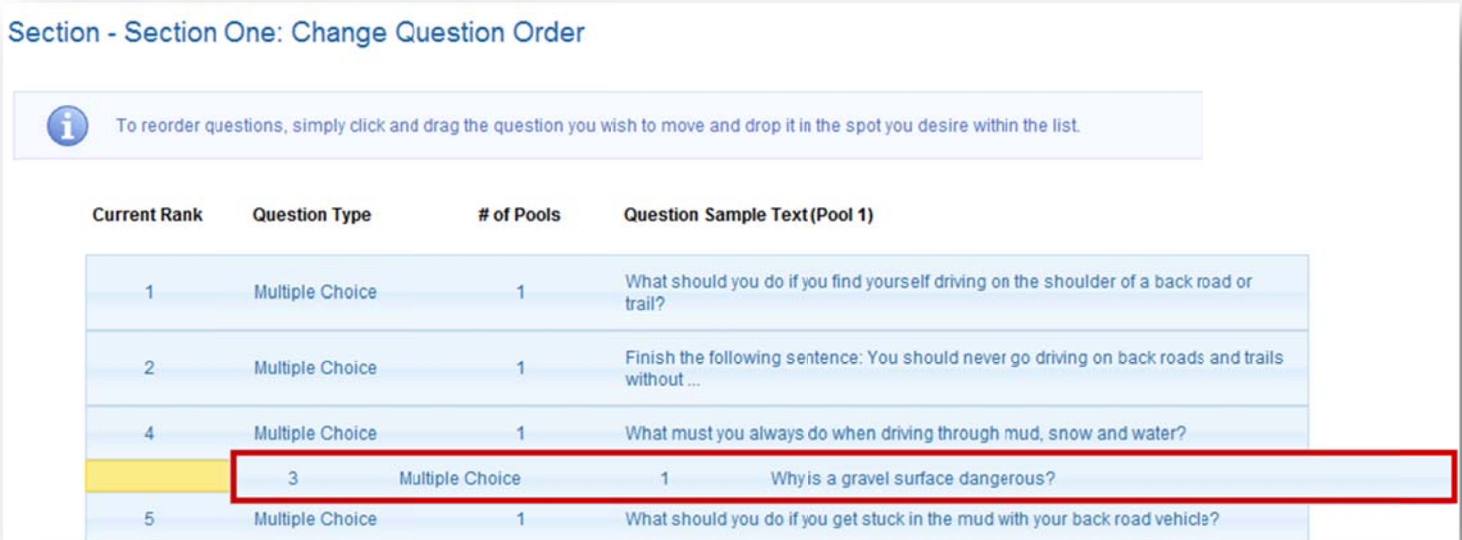


18.4.5 Reorder Questions

Click on the name of the evaluation section that you want to reorder questions in to open the manage questions page. Select the questions you wish to reorder by using the checkboxes and then click **Reorder Questions** from the options menu.



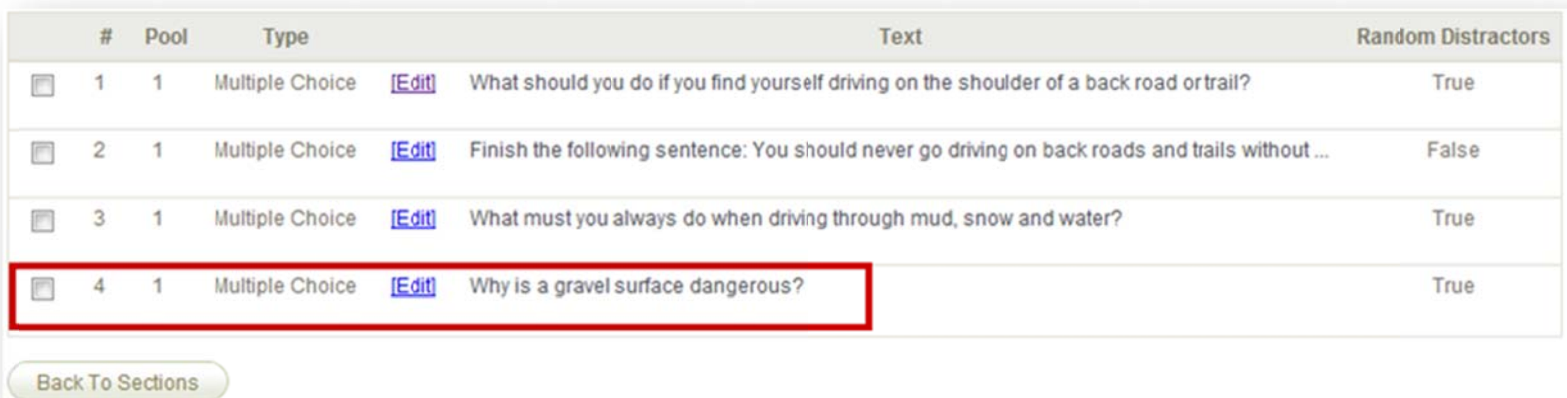
This will open a “Change Question Order” page where you can click and drag the question you wish to move and drop it into a new spot within the list.


Section - Section One: Change Question Order

To reorder questions, simply click and drag the question you wish to move and drop it in the spot you desire within the list.

Current Rank	Question Type	# of Pools	Question Sample Text (Pool 1)
1	Multiple Choice	1	What should you do if you find yourself driving on the shoulder of a back road or trail?
2	Multiple Choice	1	Finish the following sentence: You should never go driving on back roads and trails without ...
4	Multiple Choice	1	What must you always do when driving through mud, snow and water?
3	Multiple Choice	1	Why is a gravel surface dangerous?
5	Multiple Choice	1	What should you do if you get stuck in the mud with your back road vehicle?

You can reset your changes before you save or press the back button to return to the manage questions page without making the changes. Once you click save, you will see from the manage questions page that the question is now moved to the new order.

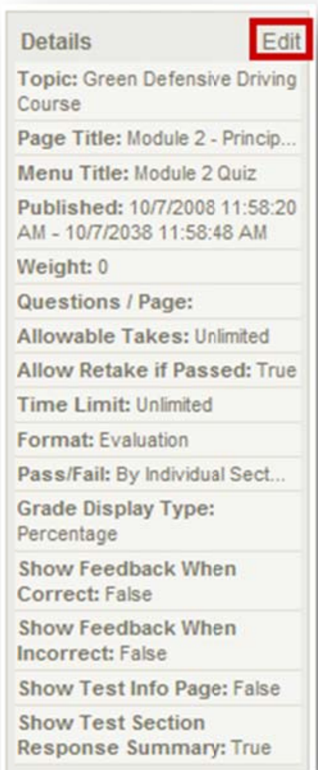


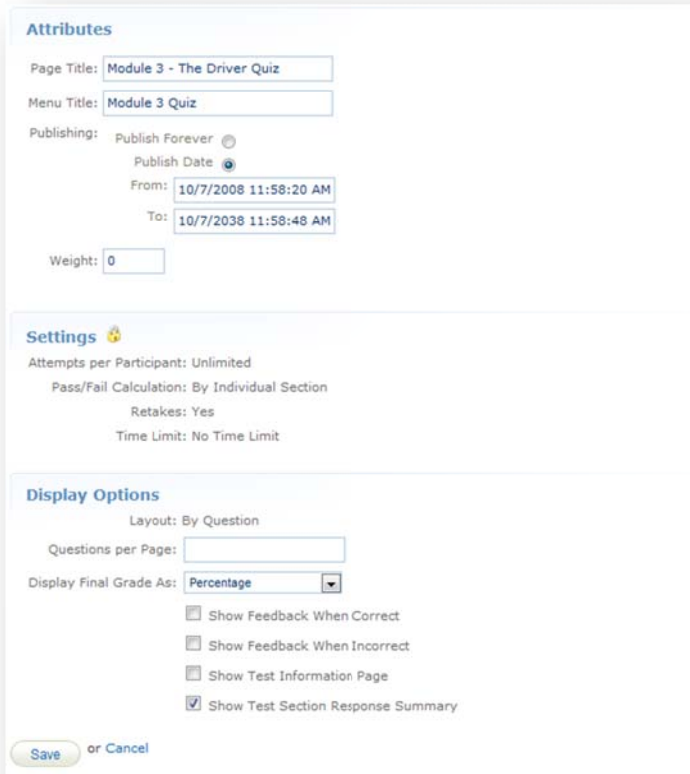
	#	Pool	Type		Text	Random Distractors
☐	1	1	Multiple Choice	[Edit]	What should you do if you find yourself driving on the shoulder of a back road or trail?	True
☐	2	1	Multiple Choice	[Edit]	Finish the following sentence: You should never go driving on back roads and trails without ...	False
☐	3	1	Multiple Choice	[Edit]	What must you always do when driving through mud, snow and water?	True
☐	4	1	Multiple Choice	[Edit]	Why is a gravel surface dangerous?	True

Back To Sections

18.5 Edit Evaluation Details

You can change the details of how an evaluation is set up by clicking the Edit link in the Details menu from any evaluation. This will open the Attributes page where you can make changes and then save them.

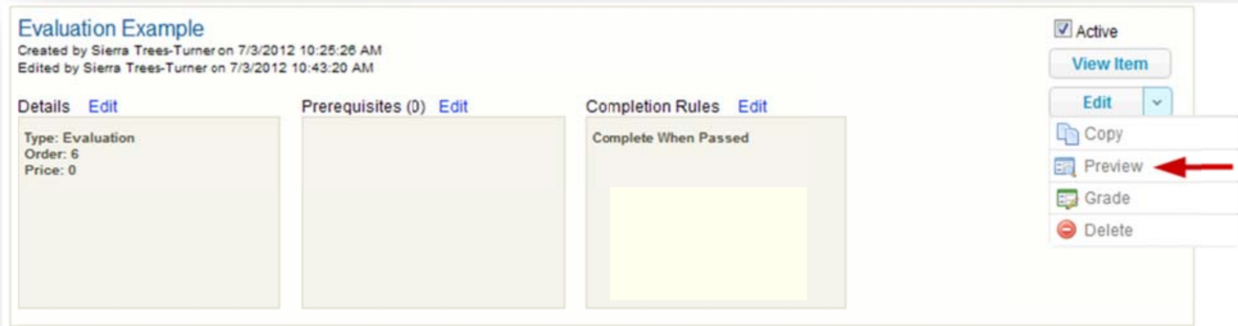




The layout option is not shown from Edit Details. This is because the layout cannot be edited after initial creation as it would affect anyone currently undergoing the evaluation.

18.6 Preview your Evaluation

Open the product in which you would like to preview an evaluation and navigate to the manage assets page. Click **Preview** for the evaluation.

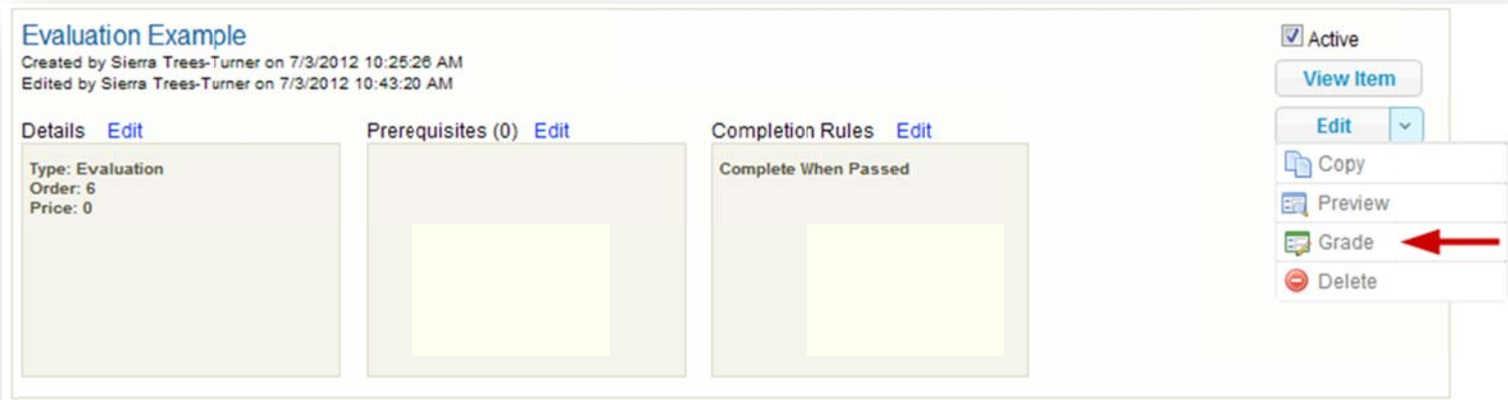


This will open a page that lists the questions in order, the answer options and an indication of the correct answer as well as correct and incorrect feedback.

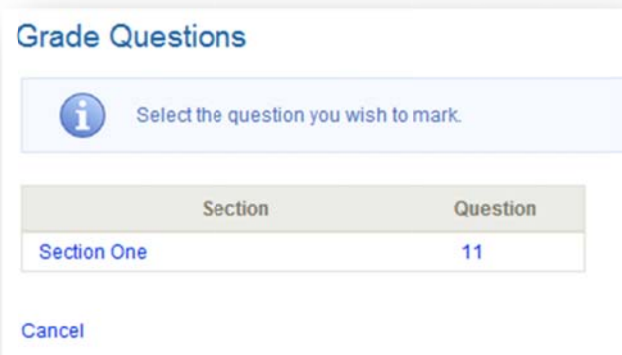
Question #	Pool #	Question Type	Question Text	Distractors / Answers	Feedback (Incorrect)	Feedback (Correct)
1	1	Multiple Choice	What are the five important elements of defensive driving?	[x] Knowledge, alertness, foresight, judgement, and skill. [ ] Knowledge, alertness, stopping time, judgement, and reaction time. [ ] Knowledge, consideration, judgement, reaction time, and skill. [ ] Knowledge, eye-lead time, judgement, reaction time, and skill.	What are the five important elements of defensive driving?	**Great work!** Defensive driving consists of these five elements.
2	1	Multiple Choice	What is a typical parking lot hazard?	[ ] Scraping other parked vehicles while entering a tight parking spot. [ ] Hitting a moving vehicle while getting out of a parking spot. [ ] Collisions with pedestrians. [x] All answers are correct.	What is a typical parking lot hazard?	**Great work!** These are all typical parking lot hazards. When in a parking lot, remember to always back into the parking space.

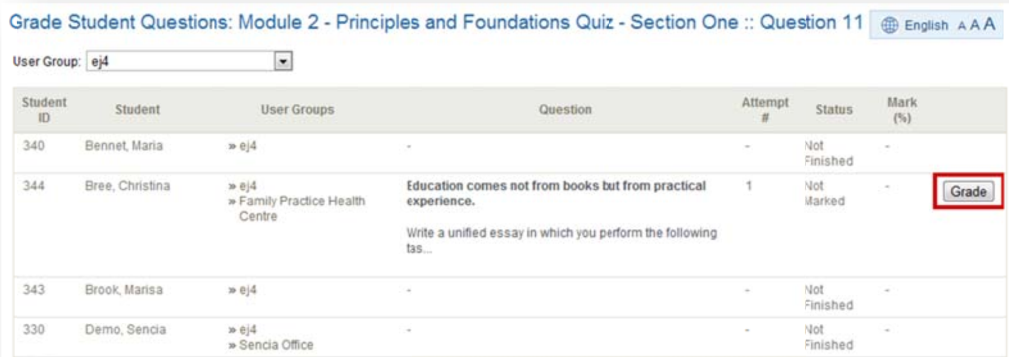
18.7 Grade Questions

This option is used to grade essay questions (essay questions cannot be automatically graded by the system) or by site managers who need to override a participant's answer. Open the product in which you would like to grade an evaluation and navigate to the manage assets page. Click **Grade** for the evaluation that contains the questions you wish to grade.

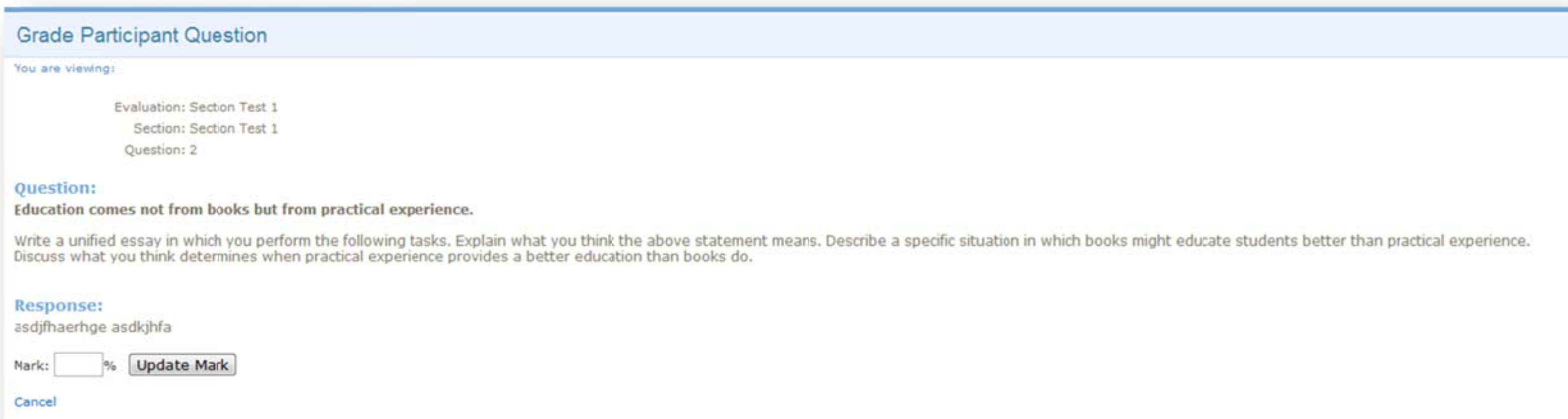


Select the question you wish to grade to open the Grade Student Questions page. Here you can grade the same question for all of the participants. To the far right of the participant's name, press the Grade button.



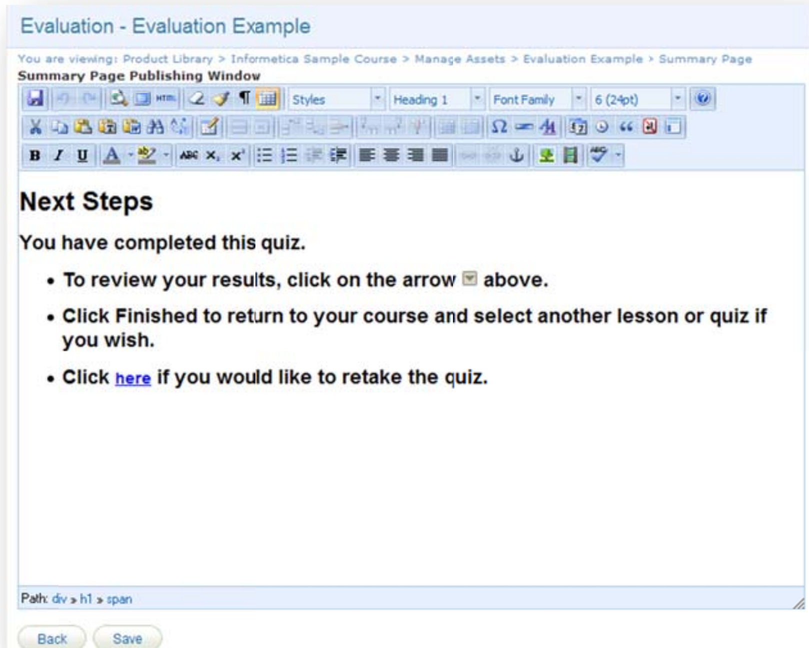


This will open the "Grade Participant Question" page. Enter a grade for the question in the Mark field and then click **Update Mark**. You can **Cancel** to go back to the list of participants for this question.

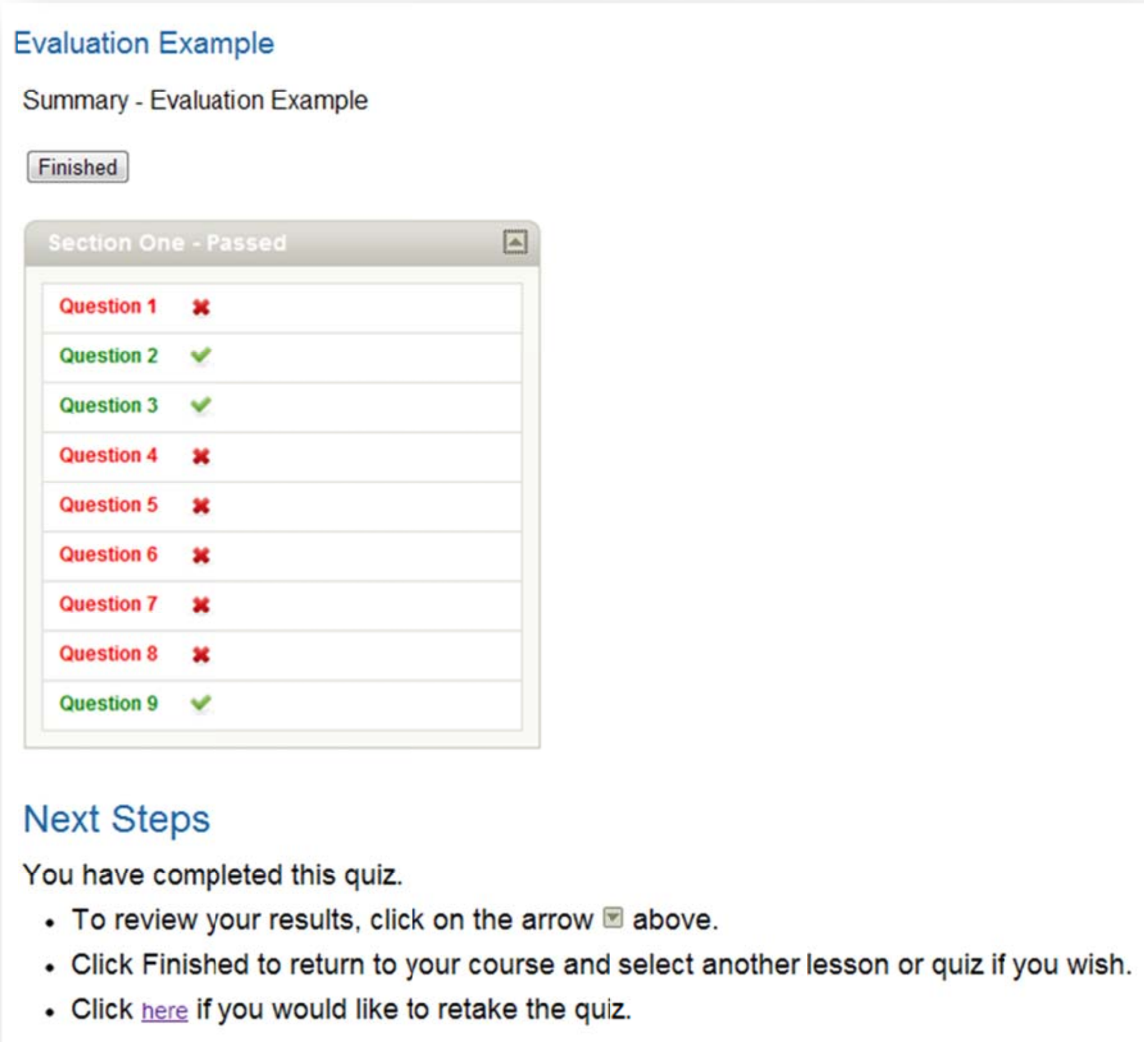


18.8 Create an Evaluation Summary

The optional evaluation summary page appears after the participant has completed all of the evaluation questions. Navigate to the manage assets page and open the evaluation you wish to create a summary for. Click **Summary Page** in the properties menu. This will open a publishing window where you can design the text and content you want the participants to see after they have completed the evaluation. Click save to save the summary and return to the manage assets page or click cancel to return to the manage assets page without saving the summary.



Below is an example of how a participant would see this. The text at the bottom is what was entered into the publishing window. The summary above shows when the option to Show Test Section Response Summary is selected when the evaluation was created.

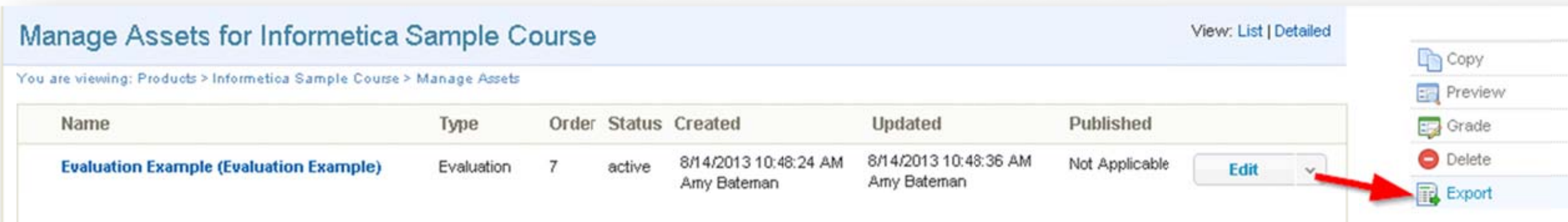


The customized summary area is a great place to let your participants know what their next steps should be after completing the evaluation.

Question Export

18.9 This option is available to Site Managers, Campus Admins, and Publishers

You can opt to export your multiple choice questions into QTI format so that they can be reused in other systems that support QTI.



From the manage assets page, select the down arrow on the Edit button for the evaluation you would like to export.

Select **Export.**

When the confirm window appears, **Save** the resulting XML file.

QTI is an industry standard that uses XML to store question and answer data in a format that can be imported into multiple applications such as learning management systems.

1. Some factors to consider when using the QTI Export tool:
2. QTI **Export** only supports multiple choice questions. If you export a test with multiple question types, the QTI file will only contain the multiple choice questions.
3. QTI Export **does** not consider pools. All questions are exported as a unique question whether they are in pools or not.
4. An XML File is generated upon QTI Export and can be imported into Prova Tests.

19. Prova Tests

Topics Covered In This Chapter

Prova tests can be used to determine a participant's knowledge of the content that you have provided. There are 7 different types of questions that can be used to create a test: essay, fill in the blank, matching, multiple answer, multiple choice, ranking, and true or false. Informetica can automatically grade every type of question in a test except for essays. Informetica's testing engine lets you create and edit tests or quizzes, applying the rules you need for a successful training and/or certification environment. You are able to apply passing grades, prerequisites, weights, randomize answer options, create question pools, test by section or by question, give feedback for correct and incorrect answers, offer a variety of question types and you are able to incorporate audio, video, graphics, external and internal links and more.

Prova tests are created and edited in a **draft mode** that is not available until a test is published and appear as drafts on the manage assets page.

Name	Type	Order	Status	Created	Updated	Published	
Sencia Staff Trivia (Sencia Staff Trivia)	Prova Evaluation	1	draft	7/13/2012 8:49:13 AM Sierra Trees-Turner	2/1/2013 10:05:48 AM Amy Bateman	Unpublished Draft	Edit

When participants submit a page of questions, the system will automatically detect if any questions were left blank and prompt the participant to enter an answer.

19.1 Create a New Test

To fully create a Prova test you will need to complete the following steps:

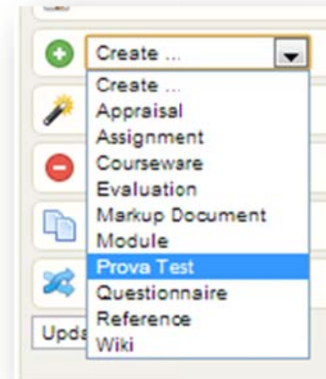
Step 1 • Create a test

Step 2 • Create questions

Step 3 • Assign questions to sections

Step 4 • Publish the test

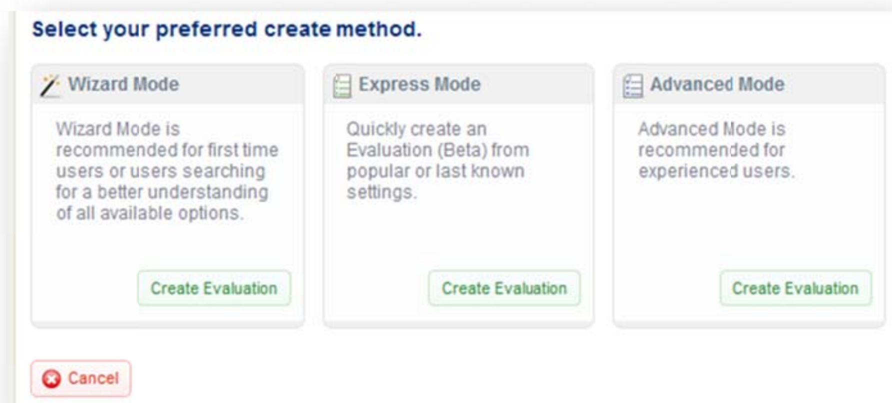
From the manage assets pages, click **create** from the options menu. Select **Prova Test** from the dropdown menu to open the create test page. You can proceed using the wizard mode, express mode, advanced mode.



Wizard Mode: Recommended for first time users or users searching for a better understanding of all available options.

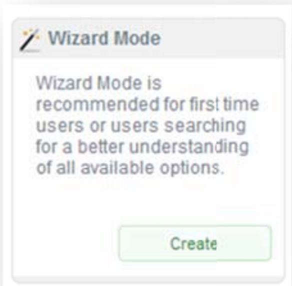
Express Mode: Let's you quickly create a test from popular or last known settings.

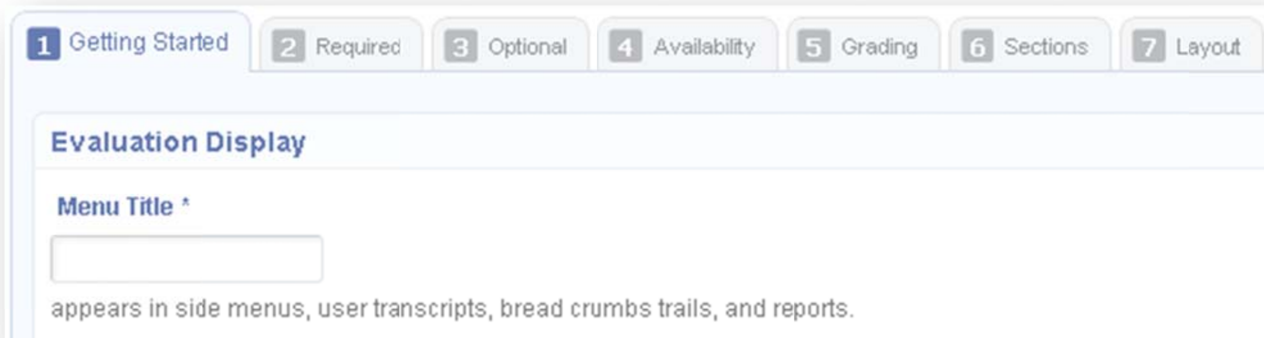
Advanced Mode: Recommended for experienced users, this mode will let you create the entire test manually



19.1.1 Wizard Mode

Wizard mode guides you through a seven step process for creating a test, including one optional step. Click **Create** at the bottom of the wizard mode box. One you have completed a step; click the button on the bottom right or the next numbered tab at the top. The test details you set up while in wizard mode can always be changed from the configuration menu later. Once you have completed the steps, click the **save & continue to questions** button at the bottom of the page in Step7.





See Configuration Options in this chapter for details on each of the configurations.

Step 1 Getting Starting: Give your evaluation a title and some other important display information.

Step 2 Required: Determine how many questions should appear on each test page.

Step 3 Optional: Changing any of these default configurations is completely optional; therefore this step can be skipped, if desired.

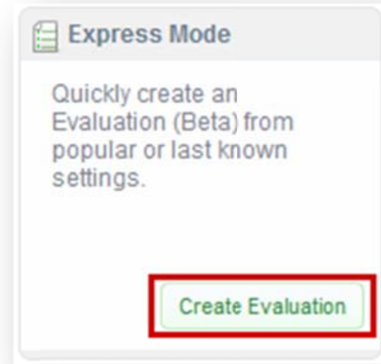
Step 4 Availability: Define thing such as number of test attempts and publication dates.

Step 5 Grading: Define the passing grade and how the grade should appear to participants.

Step 6 Sections: Set up more than one question or randomize question order.

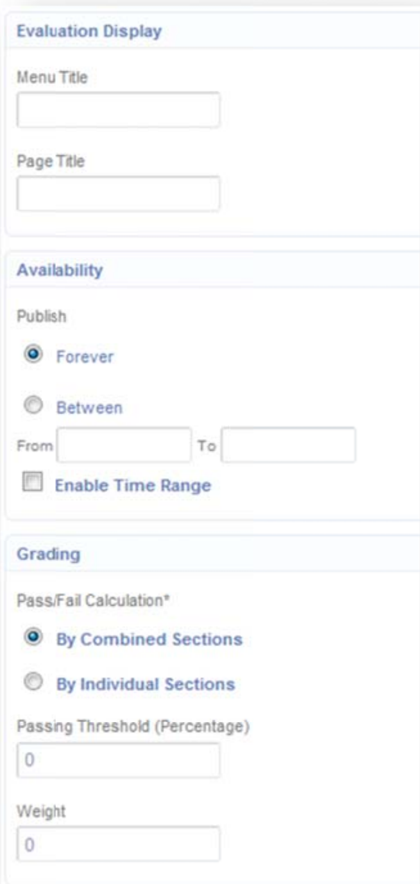
Step 7 Layout: Opt to use graphical design packages or headers and footers.

19.1.2 Express Mode



Express mode has only one simple page of required configurations to set up, and then makes assumptions for many of the details of your test, based on the type of test you select. Click the **create** button at the bottom of the express mode box. The test details you set up while in express mode can always be changed from the configuration menu later. More details about these configurations can be found later in this chapter under configuration descriptions.

Complete the Form



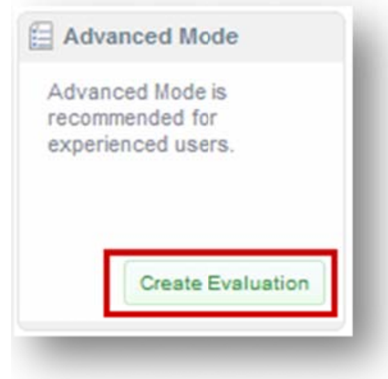
Select the Test Type:

Select the type of quiz you wish to create using the radial buttons at the bottom. Use the green configurations on the left side to help you decide which test type best suits your needs. Remember, the test details you set up while in express mode can always be changed from the configuration menu later. More details about these configurations can be found later in this chapter under configuration descriptions. Click the **save & continue to questions** button at the bottom.

		Practice Quiz	Relaxed	Strict
Display	Navigation	Free	Free	Sequential
	Questions per page	1	5	1
	Number of Sections	1	1	1
Feedback	Instant per question	Yes	No	No
	Section feedback	Yes	No	No
	Final Grade Display	Percentage	Percentage	Complete/Incomplete
Availability	Attempts	Unlimited	3	1
	Allow re-attempt if passed	Yes	Yes	No
	Time limit	None	None	1 Hour
		select	select	select

Test Type	Description
Practice Quiz	Often used so participants can test themselves on the material or to prepare for a final exam. This quiz lets participants know which questions they get correct or incorrect while they take the quiz. They can attempt the quiz again as many times as they desire, whether or not they have already passed it in order to test their preparedness and get better grade percentage.
Relaxed	Is set up so participants have as much time as they need to complete the test. Five questions are shown per page and participants will not know which questions they get correct or incorrect during the exam. The exam can be attempted three times, and can be taken again if it is passed.
Strict	Is set up like a final exam where participants have one hour to complete the questions. The participants will not know which questions they get correct or incorrect during the exam. They can only attempt the exam once and their grade will show as complete or incomplete.

19.1.3 Advanced Mode

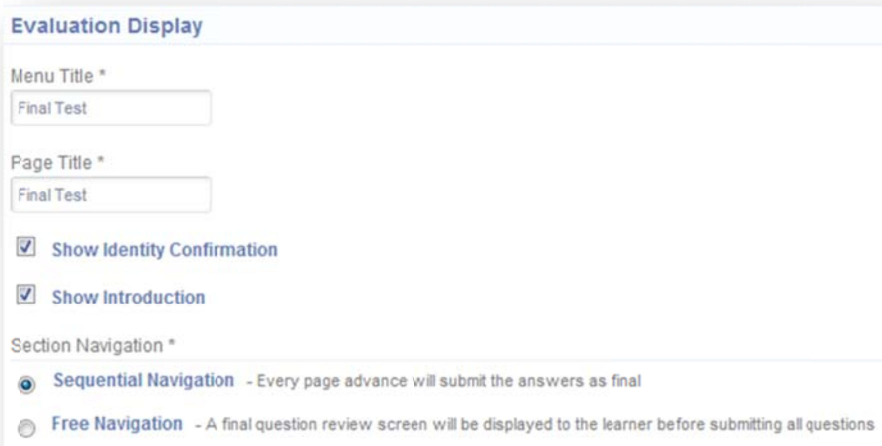


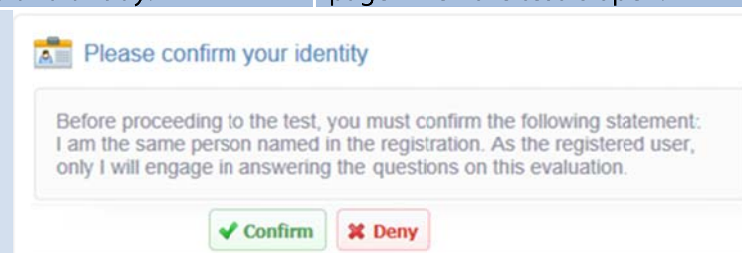
Advanced mode includes all of the test configurations on one page, but instead of using a wizard to help explain and guide you through them, the options are laid out in more of a line list format without additional description. Advanced mode is designed for users who are very familiar with creating tests in Informetica and already know the details of each configuration and how they interact with one another.

Click the **create** button at the bottom of the advanced mode box. More details about the configurations can be found later in this chapter under configuration descriptions. Once you have filled out the form, click the **save & continue to questions** button at the bottom. The test details you set up while in advanced mode can always be changed from the configuration menu later.

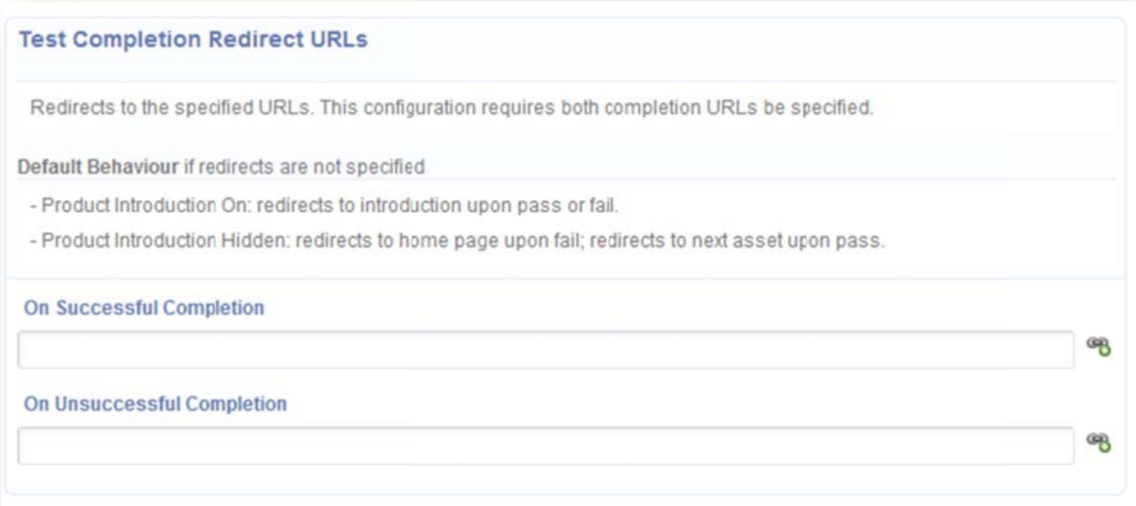
19.1.4 Description of Configuration Options:

Evaluation Display



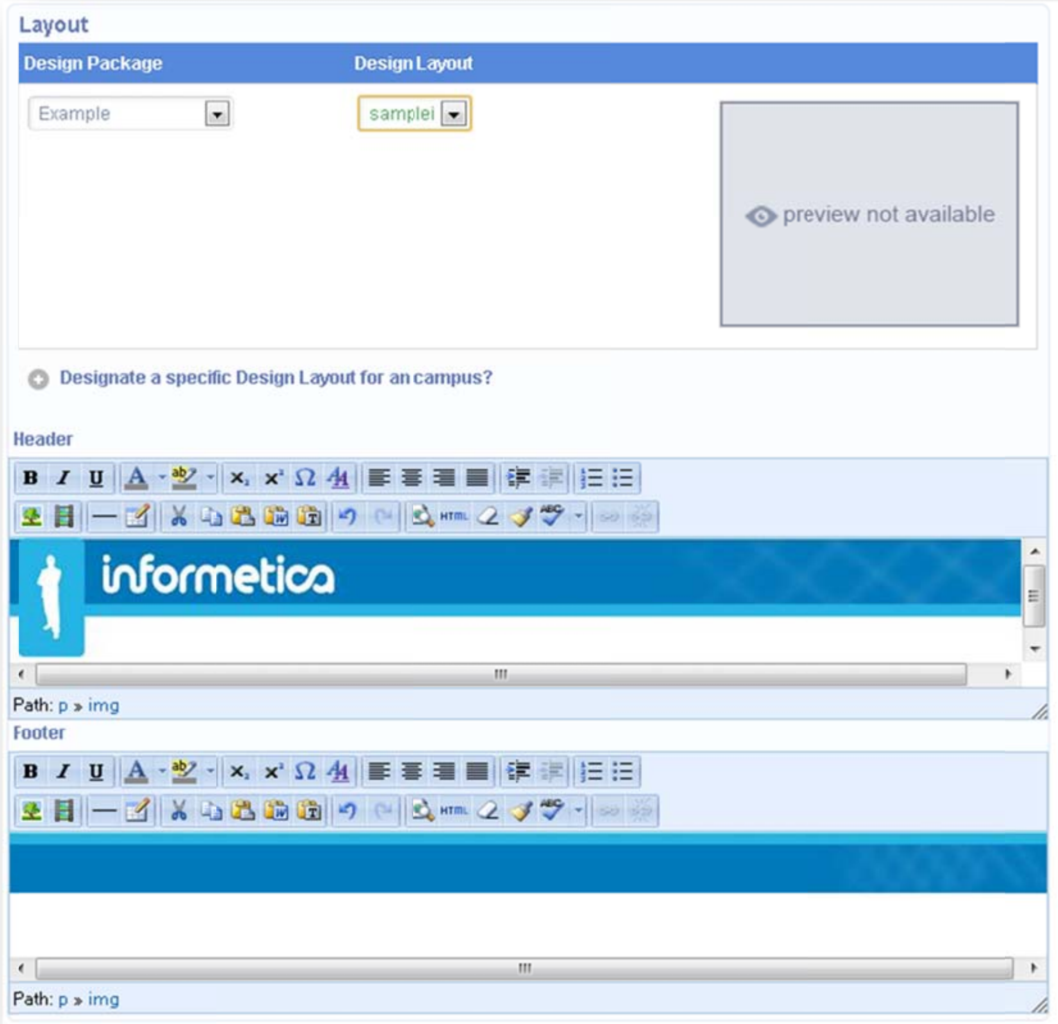
Configuration	Description
Titles	Enter a menu title for the test that will appear in side menus, user transcripts, bread crumb trails, and reports. Menus have limited display areas, so avoid long menu titles that can make displays look cramped and untidy. Enter a page title for the test as it will appear across the top of the page when the test is open.
Show Identity Confirmation	An identity confirmation screen requires participants to verify their identity against the currently logged account before beginning the test. **Deny** will log them out of the system. 
Show Introduction	An introduction page can be displayed to participants before the test questions and can include a custom message, a summary of the total sections and questions, and other feedback, such as the passing threshold.
Sequential Navigation	Select this option to prevent users from returning to a previous page of questions. All questions on the current page must be answered before advancing to the next page and all responses will be saved as a final answer.
Free Navigation	Allow users to return to previous questions within a section, review, and modify their responses before submitting their final answers.

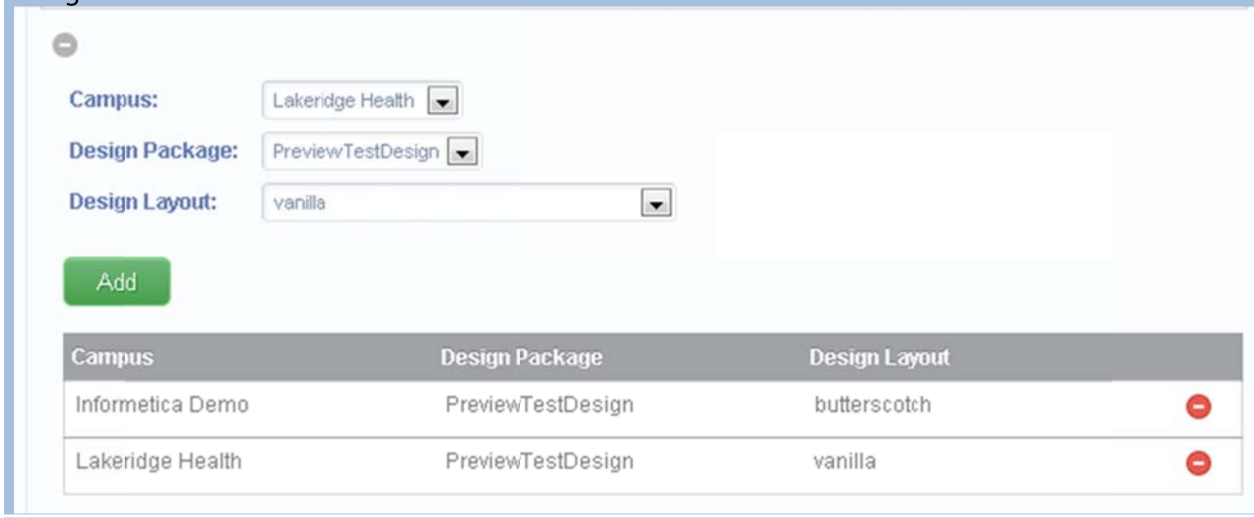
Test Completion Redirect URLs



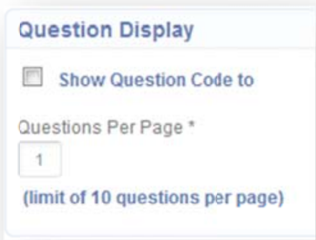
Configuration	Description
On Successful Completion	Enter the URL you would like Informetica to direct the user to upon successful completion of the test or use the link tool to direct the user to a selected page in the LMS.
On Unsuccessful Completion	Enter the URL you would like Informetica to direct the user to upon unsuccessful completion of the test or use the link tool to direct the user to a selected page in the LMS.

Layout


Layout
Design Package
Design Layout
Example
samplei
preview not available
Designate a specific Design Layout for an campus?
Header
informetica
Path: p » img
Footer
Path: p » img

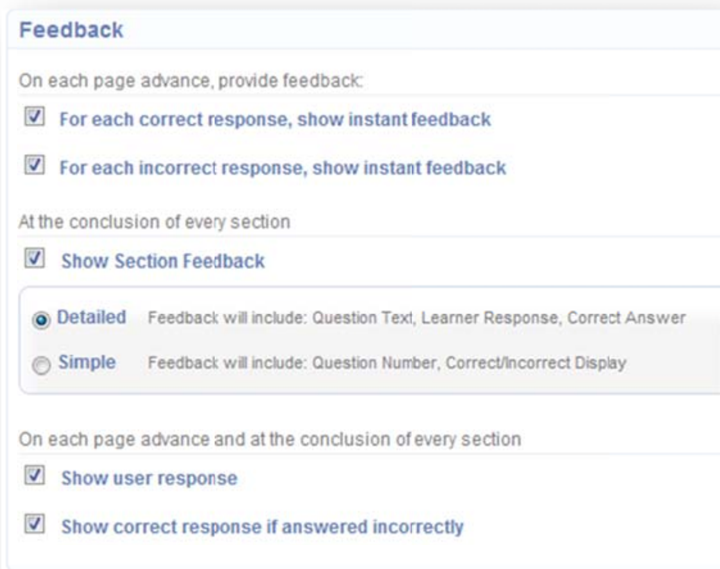
Configuration	Description
Design Package	Select the design package that you would like to apply to this test. For details on creating design packages, visit the Design Packages chapter of this manual.
Design Layout	Select the layout from the design package that you would like to apply to this test. For details on creating design layouts within a design package, visit the Design Packages chapter of this manual.
Designate a Specific Design Layout for a Campus	You can apply separate designs to a specific campus that will override the selection applied in previous steps. • Click the plus symbol to expand the page • Select a campus • Select a design package • Select a design layout • **Add** to save the design to a campus Repeat the process for as many campuses as you like. To remove a campus design, use the **delete** button next to the design. 
Header	This is an optional banner that you can design and then insert onto the top of each test page.
Footer	This is an optional banner that you can design and then insert onto the bottom of each test page.

Question Display



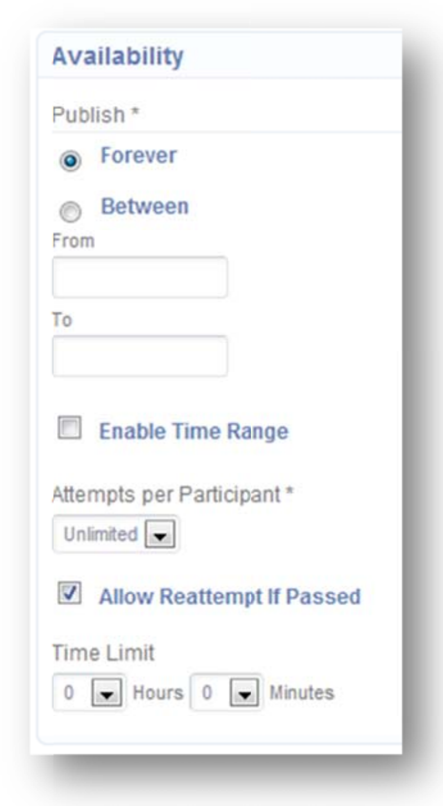
Configuration	Description
Show Question Code	Select to display an identification code for each question to learners. The question author is responsible for providing the identification code for each question. This code is typically used to uniquely reference the question, as question and response randomization options may otherwise obscure question identification.
Questions Per Page	Enter the number of questions you want displayed on each page of the test, up to a maximum of 10 questions per page.

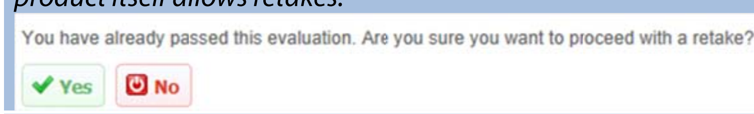
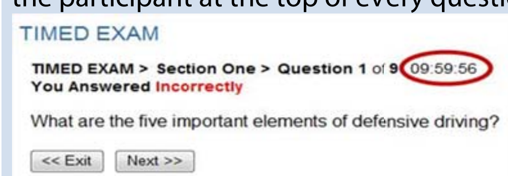
Feedback



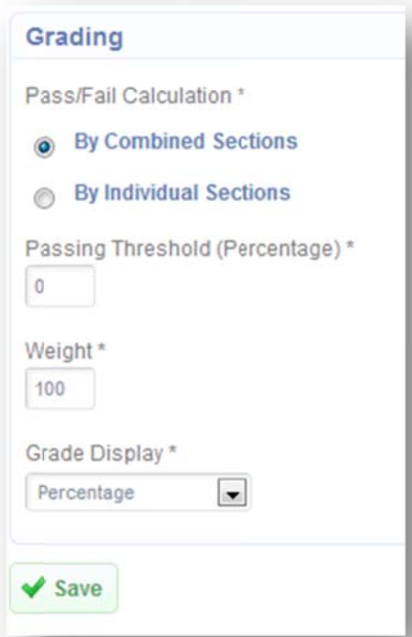
Configuration	Description
Correct Response	Select to show instant feedback for each correct response, per submitted question page. Includes any provided question-specific feedback.
Incorrect Response	Select to show instant feedback for each incorrect response, per submitted question page. Feedback will reveal the correct response and also include any provided question-specific feedback. *Note that in tests set up using free navigation, instant feedback will not be shown.*
Show Section Feedback	Select to show feedback at the end of the section. • Simple View: Shows only a summary of incorrect and correct responses • Detailed View: Reveals the correct answers and shows custom feedback.
Show User Response	Select to show the user's own responses for each question both after submitting a page of questions and at the end of the section.
Show Correct Response	Select to show the user the correct answers for each question both after submitting a page of questions and at the end of the section.

Availability



Configuration	Description
Publish Forever	A test that is published forever is always available to enrolled participants.
Publish Between	Tests published between specific dates are available to enrolled participants only during the published dates. Tests that fall outside the published dates are no longer seen by enrolled participants.
Enable Time Range	Access to tests published between dates can be narrowed to a time range.
Attempts per Participant	Select the number of times a participant is allowed to attempt this test (1-5 attempts or unlimited).
Allow Reattempt if Passed	Select to allow participants to exhaust all available attempts even if they have already passed the test. If not enabled, the participant's first passing score will be recorded as final and they will be prevented from re-entering the test. ——— *When retakes are enabled in combination with a pass/fail calculation by* ***individual sections****, then a participant must answer the questions from all sections on a retake of the test, even if the sections were already passed. Exceptions created for tests that are set up by individual section and allow only 1 retake will allow participants to retake only failed sections.* ——— *When retakes are enabled in combination with a pass/fail calculation by* ***combined sections,*** *then a participant may reattempt the test, assuming that the product itself allows retakes.* 
Time Limit	You can restrict the length of time a participant has to complete the test by selecting the hours and minutes. The amount of time remaining will appear to the participant at the top of every question page in a countdown of numbers. 

Grading

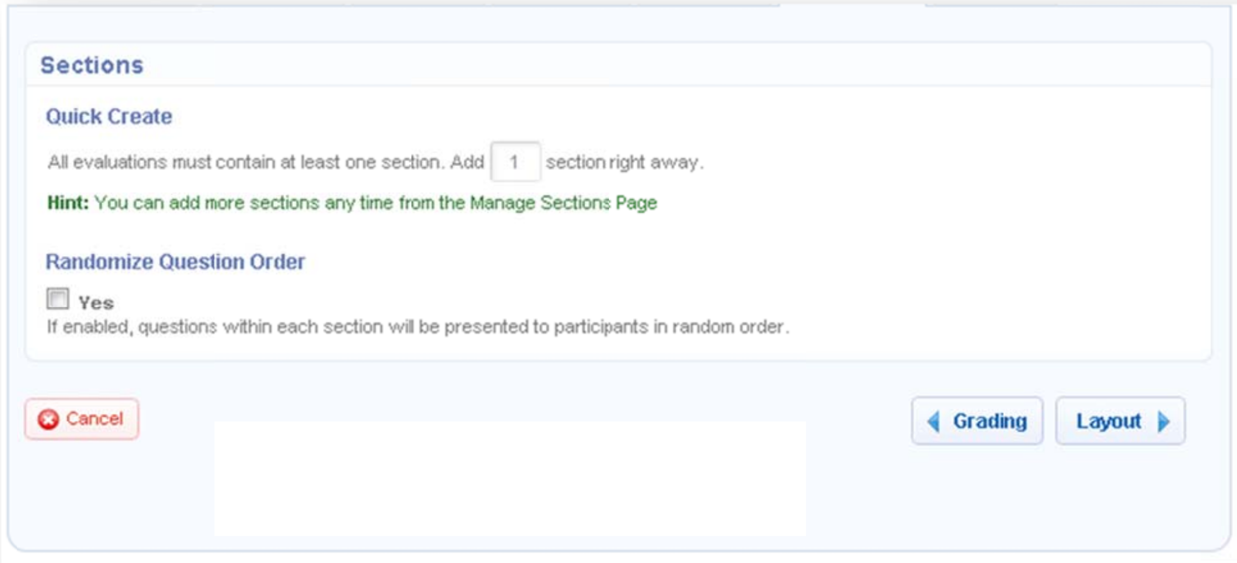


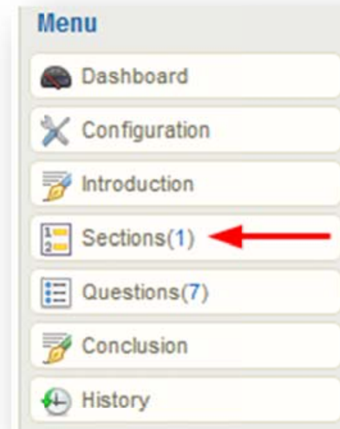
Use a 0 in passing threshold to create a test with no passing grade, such as a practice test.

Configuration	Description
Pass/Fail Calculation by Combined Sections	Questions are scored and a percentage is determined against all questions in the test, regardless of how questions are grouped into sections. A single passing threshold is required for the test. On retake, the participant must retake all questions.
Pass/Fail Calculation by Individual Section	The questions within each section are graded and a percentage is determined for each section. A passing threshold is applied to each section within the test and the participant has passed the test once each section has been passed. On retakes, if the option to retake on pass is not enabled, the user will only be presented with the sections that they have not passed.
Passing Threshold	Enter the percentage of correct questions required to pass this test. The passing threshold is needed to determine if the user passed or failed. The system will use this information to show the result as Complete/Incomplete, Pass/Fail, Grade Without Remarks, or Percentage as set up for the test. For example, for Grade Without Remarks, if you want participants to get at least 35 out of 40 questions right in order to pass, then you must enter the pass rate as 87.5 (%). For Pass/Fail, if you need the participant to get half of the questions correct in order to pass, you must enter the pass rate as 50 (%). Enter a 0 if the test required needs no passing grade, such as a practise test.
Weight	Enter a percentage that the test is worth towards the entire product's grade, if applicable. The weight of each asset is used to calculate the participant's final score within the product.
Grade Display	Use the drop down menu to choose how you would like the test grade to be shown on participant transcripts upon completion as follows: • Complete/Incomplete: displays grade results as complete or not complete. • Grade Without Remarks: displays grade results as a numerical grade (also known as a score or mark). For example, a test may have a maximum numerical value of 40 with a passing score of 30. If the participant earns 35 marks, 35 will appear on as a passing grade on the transcript. • Pass/Fail: displays grade results as an overall pass or fail result. • Percentage: displays grade results as a percentage (default option).

Sections

If not using the wizard, these configurations can be managed in Sections. Most details can be found in the Test Section portion of this chapter.





Configuration	Description
Randomize Question Order	Select this to have questions within each section presented to participants in random order.
Sections Quick Create	Enter the number of sections you want to have in this test. All tests must contain at least one section. If you only add one now, you can always add more sections from the Manage Sections Page later.

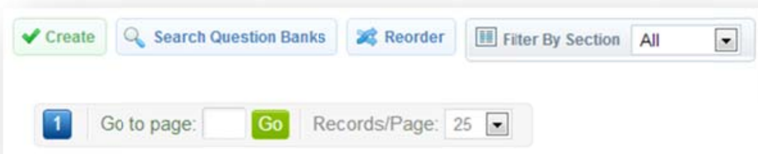
19.2 Test Questions

Immediately after creating a new test, you will be prompted to create questions. There are three methods for populating questions for a test. Both methods can be used in the same test.

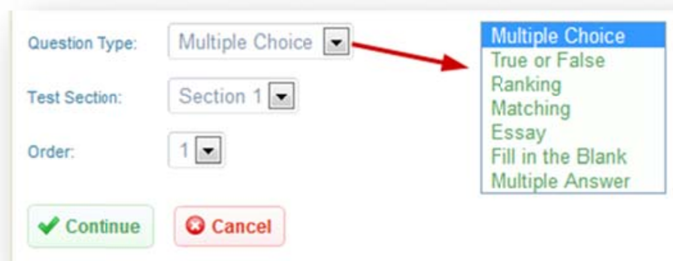
- Create questions directly within your test
- Import questions
- Select pre-created questions from question banks to use in the test

19.2.1 Create Questions

1. Select **Create** to start creating a new question. Return to questions at any time by selecting **Questions** from the Prova test menu.



2. Select a **Question Type** from the drop down menu.
3. Select the **Section** that will house the question.
4. Questions are automatically assigned a default order number as you create them. You can override the default by using the **Order** drop down menu to select a new number and add a question before or after one you have already created. You can also reorder the questions from the Questions Menu later.
5. Select **Continue** to start creating content for the question.

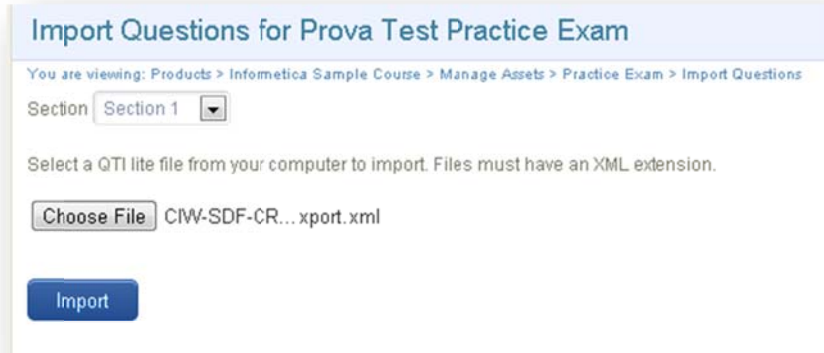


19.2.2 Import Questions

This option is available to Site Managers, Campus Admins, and Publishers

You can opt to import questions directly to your test from a QTI file format. Informetica's original testing engine lets you export multiple choice questions into QTI format and there are many course authoring and test building systems that allow for export to QTI as well. . Informetica does not currently have QTI export for Prova tests or Question banks, but this will be available in future development.

1. Within any Prova test, select **Import** from the Tools menu.



2. Select **Choose File** to specify the QTI file to import.
3. Select **Import**.

This can take a few minutes to upload, depending on the number of questions. We recommend that you use a wired connection during the upload to reduce any connection issues. Modern browsers should display the upload progress.

QTI is an industry standard that uses XML to store question and answer data in a format that can be imported into multiple applications such as learning management systems.

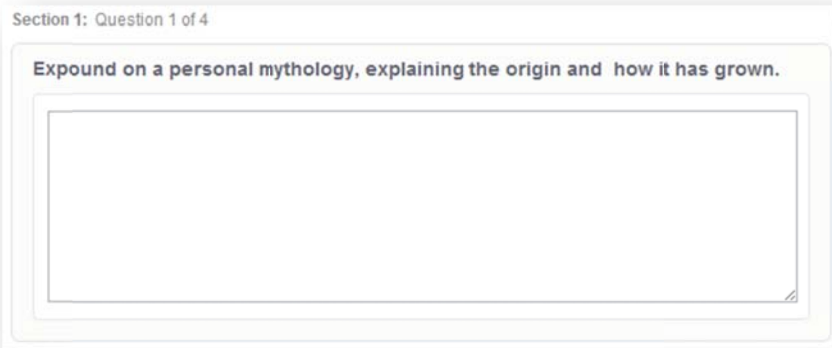
19.2.3 Question Types

Here is a brief explanation of each question type:

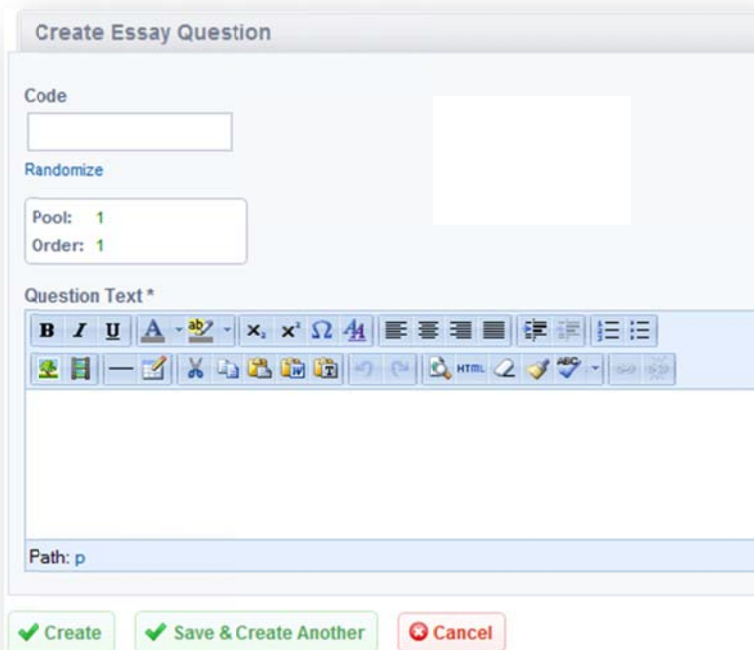
Question Type	Description
Essay	Essays require participants to write and submit a longer test answer. Essay questions cannot be automatically graded.
Fill in the Blank	Participants are required to type a short answer into a blank field within the question. There is only one correct answer to this type of question and all answers must be correctly spelled to be counted as correct.
Matching	Matching requires participants to correctly match the terms or statements on one list with the terms or statements on another list. There is only one correct answer to this type of question since all items must be correctly matched.
Multiple Answer	These questions allow participants to choose more than one answer. There is only one correct answer to this type of question since partially correct answers are considered incorrect.
Multiple Choice	These questions require participants to select the correct answer from several offered choices. There is only one correct answer to this type of question since all items that are correct must be selected.
Ranking	These questions require participants to put all items in the correct rank. There is only one correct answer to this type of question since all items must be correctly ordered.
True or False	These questions force participants to choose one of only two possible answers: True or False. There is only one correct answer to this type of question since only one statement is the correct answer.

Essay Questions

Essay questions require participants to write and submit an answer in their own words. Essay questions cannot be automatically graded. So participants will need to wait until the essay is graded to see their final grade. Here is how an essay question would appear to participants:



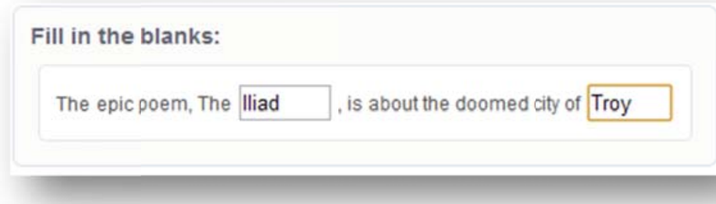
Fill out the form to create a matching question.



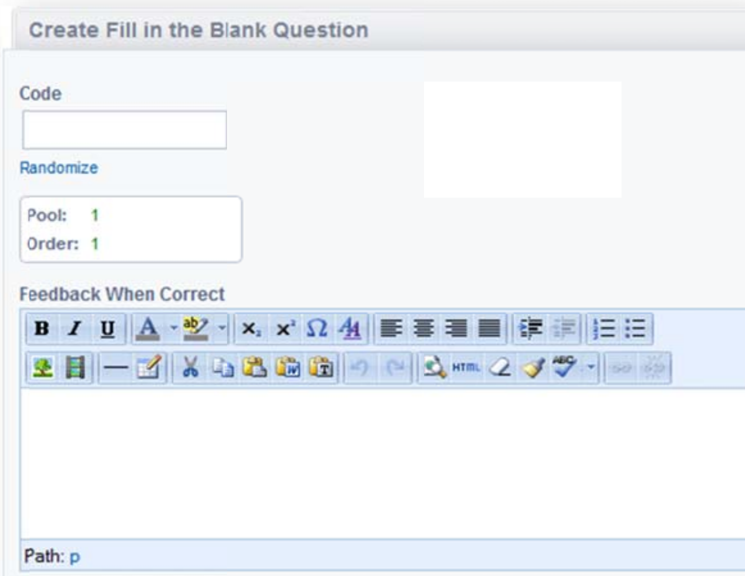
Field	Description
Code	This optional code uniquely identifies question to users if enabled in the configuration. It is especially useful with question or answer randomization.
Pool	If you have set up more than one pool for the section, enter the question text for each.
Order	The current order number of the question. You can use the drop down menu to change the order.
Question Text	Use the content editor to design the question using whatever text and supporting files you want.
Create	Saves the question and returns you to the questions page.
Save & Create Another	Saves the question and immediately starts another new essay question.
Cancel	Returns you to the questions page without saving the question.

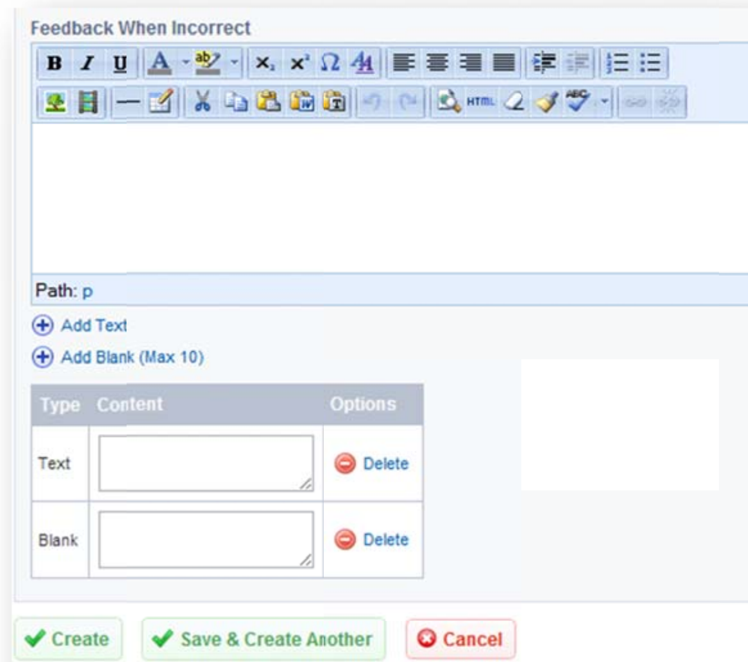
Fill in the Blank Questions

Fill in the blank questions require the participant to type a short answer into a blank field within the question. There is only one correct answer to this type of question and all answers must be correctly spelled, but not case sensitive, to be automatically graded as correct. Here is how a fill in the blank question would appear to participants:



Fill out the form to create a true or false question.



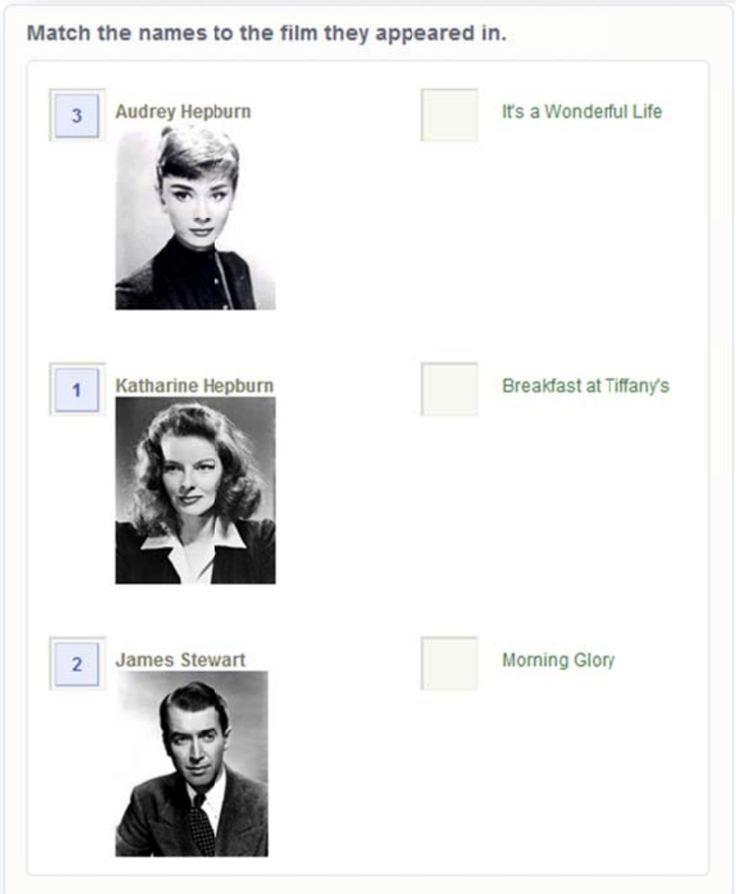


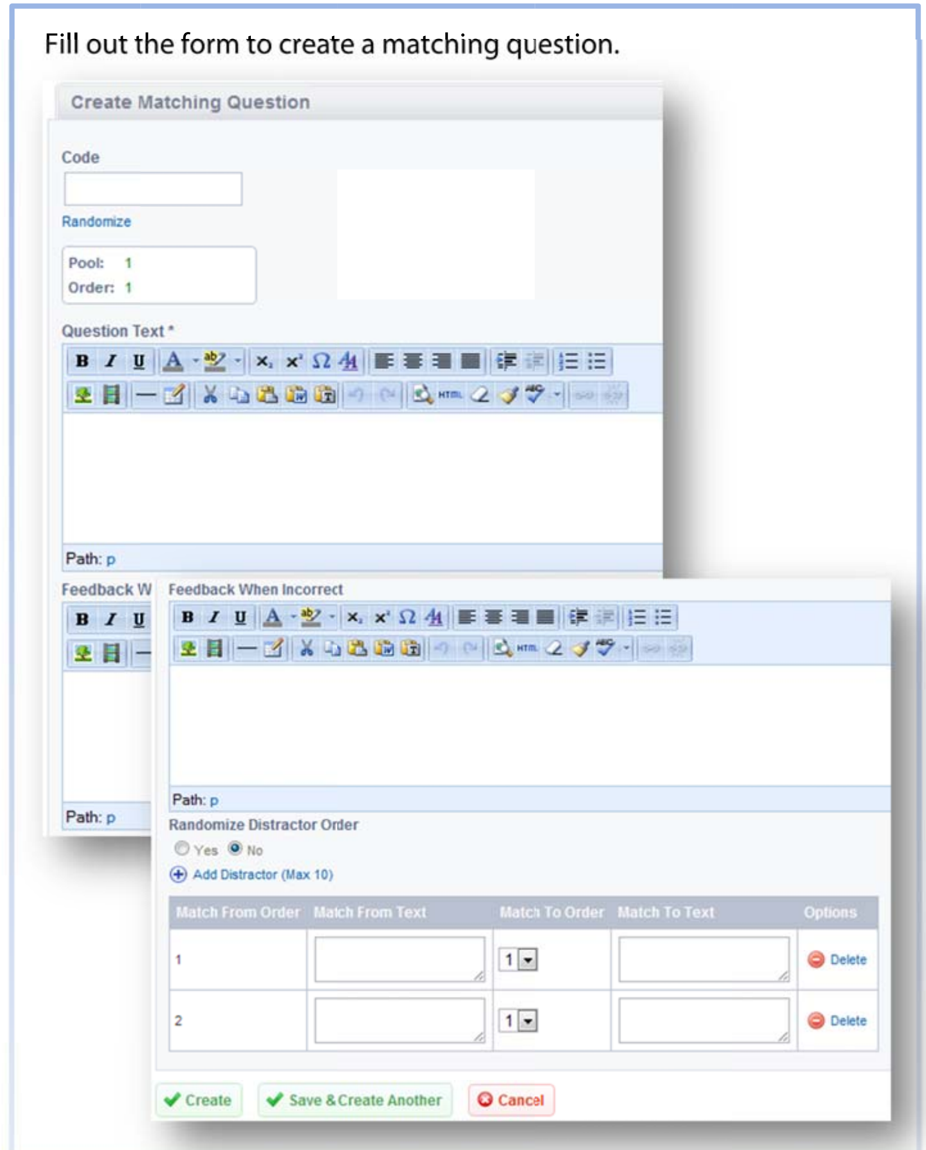
Below is a brief description of each field:

Field	Description
Code	If you enabled this option during set up, then this optional code can be used to uniquely identify the question to users, as question and response randomization options may otherwise obscure question identification. If left blank, then participants will see the empty question code.
Pool	If you have set up more than one pool for the section, enter the Question Text for each.
Order	The current order number of the question. You can use the drop down menu to change the order.
Feedback Correct/Incorrect	Use the publishing window to design optional feedback for the participant using whatever text and supporting files you want.
Text Content	This is the portion of the question that the participant will see. Select "Add Text" to include more than one visible element to the question. Use the delete button to remove a text field.
Blank Content	This is the portion of the question that the participant will fill in when taking the test. Select "Add Blank" to have more than one blank in the question. Use the delete button to remove a blank field.
Create	This button will save the question and return you to the questions page.
Save & Create Another	This button will save the question and immediately start another new fill in the blank question.
Cancel	This button will return you to the questions page without saving the question.

Matching Questions

Matching questions require the participant to use a drag and drop technique to correctly match the items on one list with the items on another list. There is only one correct answer to this type of question since all items must be correctly matched. Here is how a matching question would appear to participants; the number on the left must be dragged over to the correct match on the right:



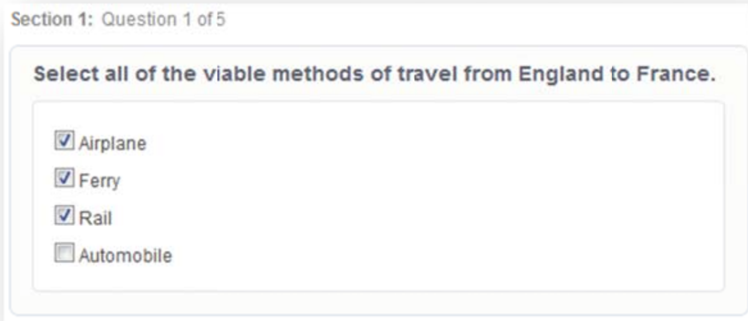


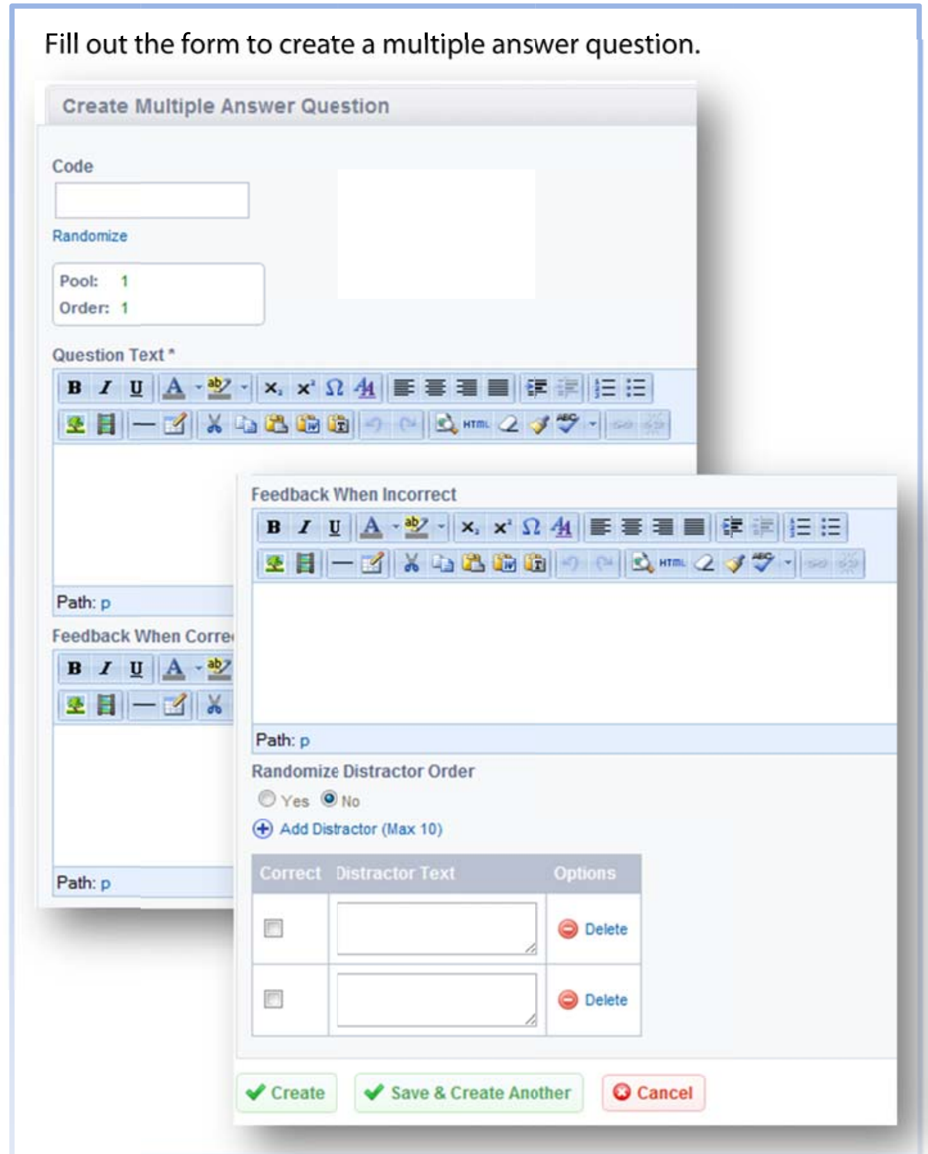
Below is a brief description of each field:

Field	Description
Code	If you enabled this option during set up, then this optional code can be used to uniquely identify the question to users, as question and response randomization options may otherwise obscure question identification. If left blank, then participants will see the empty question code.
Pool	If you have set up more than one pool for the section, enter the Question Text for each.
Order	The current order number of the question. You can use the drop down menu to change the order.
Question Text	Use the publishing window to design the question using whatever text and supporting files you want.
Feedback Correct/Incorrect	Use the publishing window to design optional feedback for the participant using whatever text and supporting files you want.
Randomize Distractor Order	Select "yes" if you want to randomize the order in which participants will see the answers. For matching questions, both the match from and match to text are randomized.
Add Distractor	Click "Add Distractor" to increase the number of choices for participants to select as answers. You can have a maximum of 10 distractors.
Match From Order	Informetica will automatically assign a number for this field in numerical order. This number will correlate directly to the match from text you enter into the next field.
Match From Text	The text you enter here will be a choice offered to participants in the left column. This choice will be matched to an item on the right side. You can even add a bit of simple HTML code into this field, e.g. to add an image. Use the delete button to remove a distractor.
Match To Order	Use the drop down menu to select the number that correctly matches the item from the match from text to create a correctly matched pair.
Match To Text	The text you enter here will be a match offered to participants in the right column. An item on the left will be matched to this item. You can even add a bit of simple HTML code into this field, e.g. to add an image. Use the delete button to remove a distractor.
Create	This button will save the question and return you to the questions page.
Save & Create Another	This button will save the question and immediately start another new matching question.
Cancel	This button will return you to the questions page without saving the question.

Multiple Answer Questions

Multiple answer questions allow participants to choose more than one answer. There is only one correct answer to this type of question since partially correct answers are considered incorrect. Here is how a multiple answer question would appear to participants:



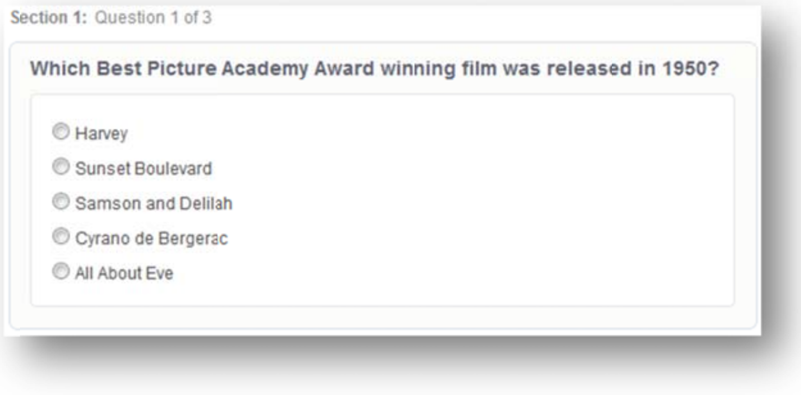


Below is a brief description of each field:

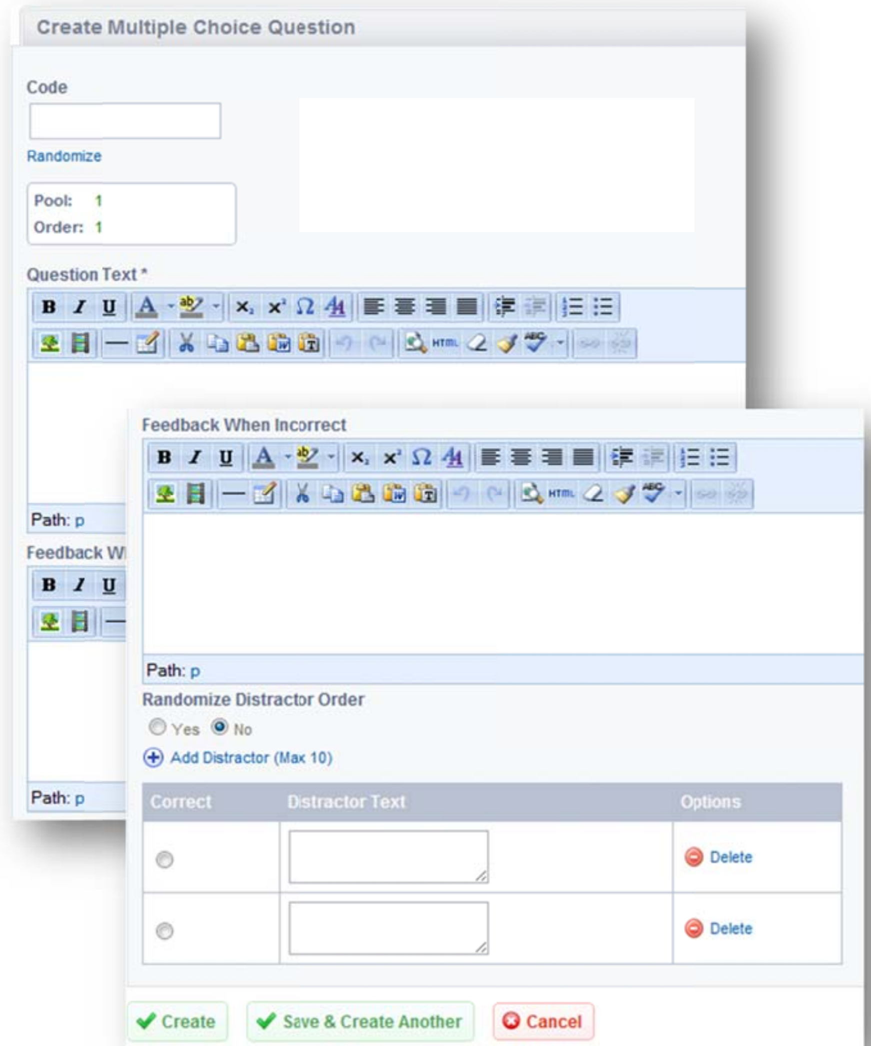
Field	Description
Code	If you enabled this option during set up, then this optional code can be used to uniquely identify the question to users, as question and response randomization options may otherwise obscure question identification. If left blank, then participants will see the empty question code.
Pool	If you have set up more than one pool for the section, enter the Question Text for each.
Order	The current order number of the question. You can use the drop down menu to change the order.
Question Text	Use the publishing window to design the question using whatever text and supporting files you want.
Feedback Correct/Incorrect	Use the publishing window to design optional feedback for the participant using whatever text and supporting files you want.
Randomize Distractor Order	Select "yes" if you want to randomize the order in which participants will see the answers.
Add Distractor	Click "Add Distractor" to increase the number of choices for participants to select as answers. You can have a maximum of 10 distractors.
Correct	Place a check before every distractor that is a correct answer.
Distractor Text	For each distractor, enter the text that will be offered as a choice for the participant to select as an answer. Use the delete button to remove a distractor.
Create	This button will save the question and return you to the questions page.
Save & Create Another	This button will save the question and immediately start another new multiple answer question.
Cancel	This button will return you to the questions page without saving the question.

Multiple Choice Questions

In multiple choice questions, participants must select the correct answer from several offered choices. There is only one correct answer to this type of question. Here is how a multiple choice question would appear to participants:



Fill out the form to create a multiple choice question.

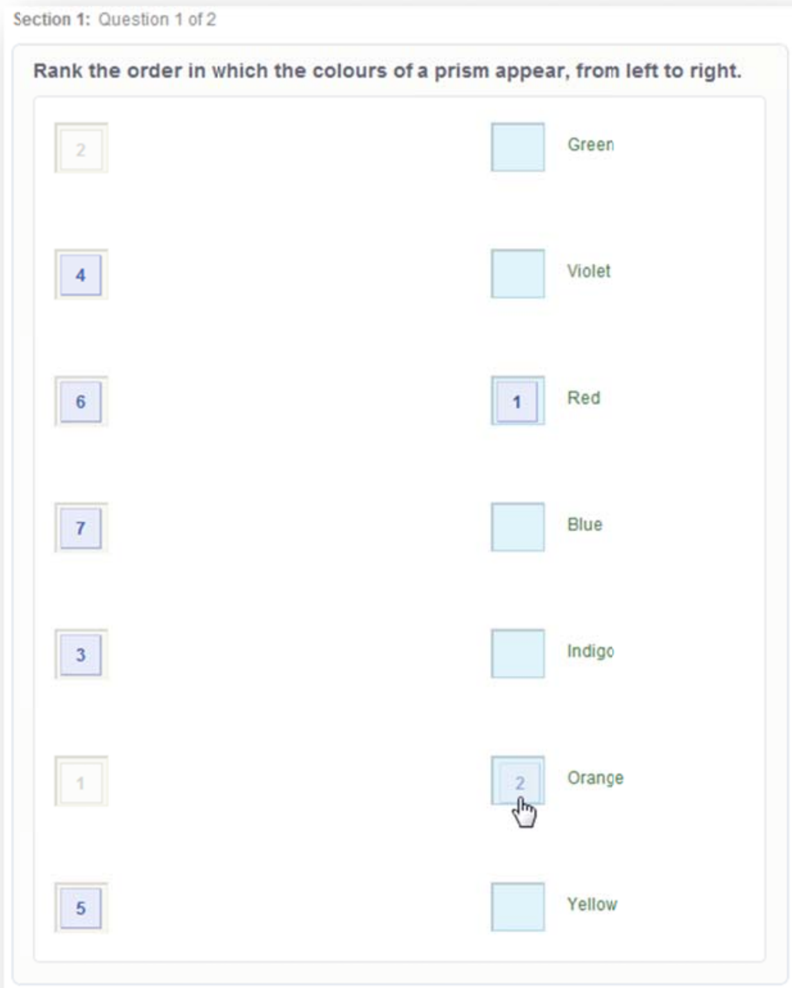


Below is a brief description of each field:

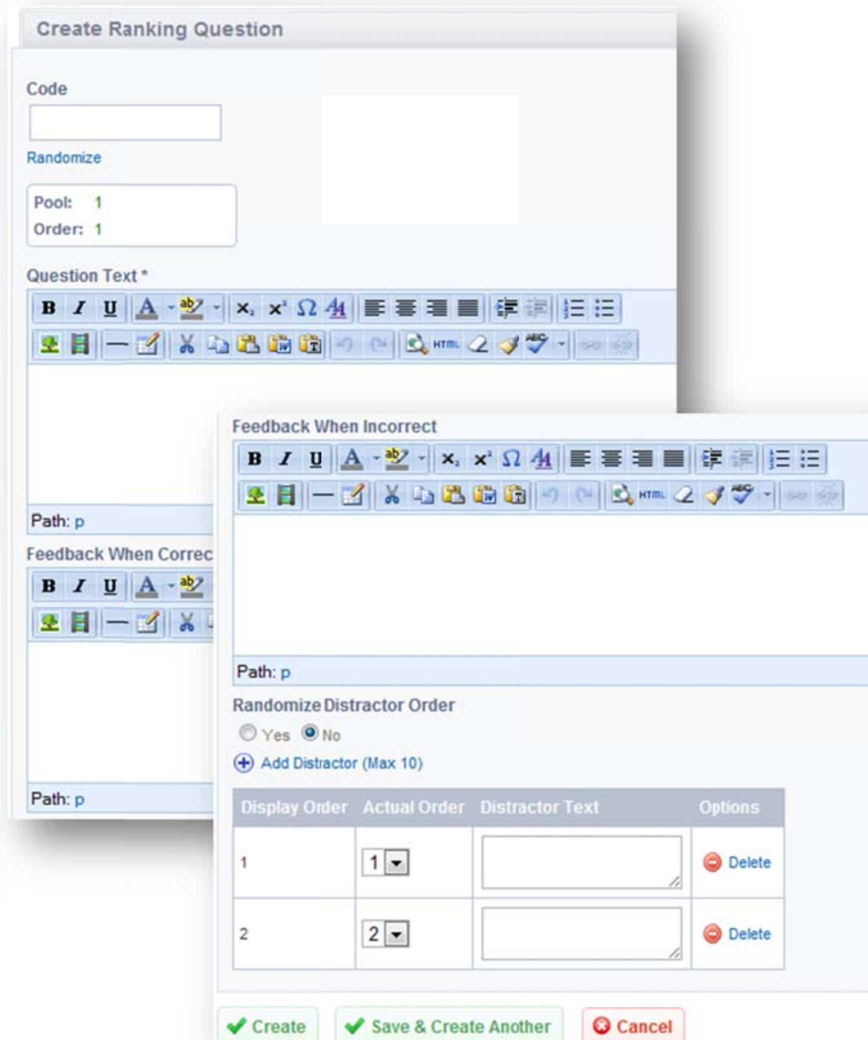
Field	Description
Code	If you enabled this option during set up, then this optional code can be used to uniquely identify the question to users, as question and response randomization options may otherwise obscure question identification. If left blank, then participants will see the empty question code.
Pool	If you have set up more than one pool for the section, enter the Question Text for each.
Order	The current order number of the question. You can use the drop down menu to change the order.
Question Text	Use the publishing window to design the question using whatever text and supporting files you want.
Feedback Correct/Incorrect	Use the publishing window to design optional feedback for the participant using whatever text and supporting files you want.
Randomize Distractor Order	Select "yes" if you want to randomize the order in which participants will see the answers.
Add Distractor	Click "Add Distractor" to increase the number of choices for participants to select as answers. You can have a maximum of 10 distractors.
Correct	Select the one distractor that is the correct answer.
Distractor Text	For each distractor, enter the text that will be offered as a choice for the participant to select as an answer. Use the delete button to remove a distractor.
Create	This button will save the question and return you to the questions page.
Save & Create Another	This button will save the question and immediately start another new multiple choice question.
Cancel	This button will return you to the questions page without saving the question.

Ranking Questions

A ranking question requires participants to number items in the correct order. There is only one correct answer to this type of question since all items must be correctly ordered. Numbers are dragged from the left column to their appropriate match in the right column. Here is how a ranking question would appear to participants:



Fill out the form to create a ranking question.



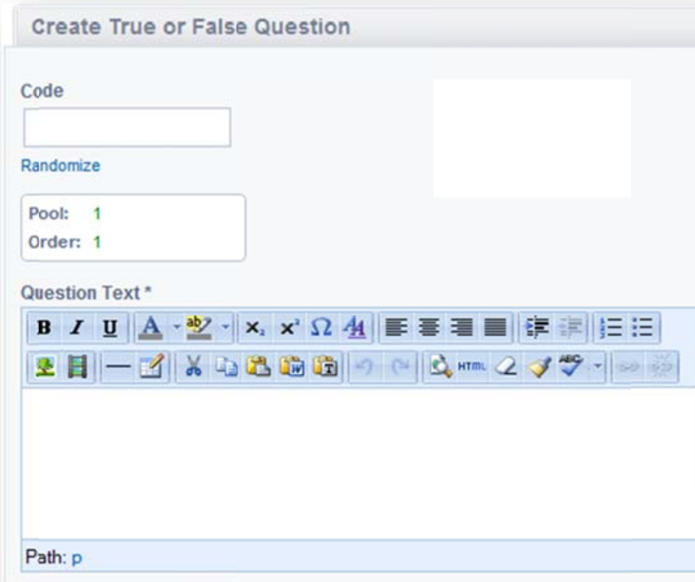
Below is a brief description of items on the create question form:

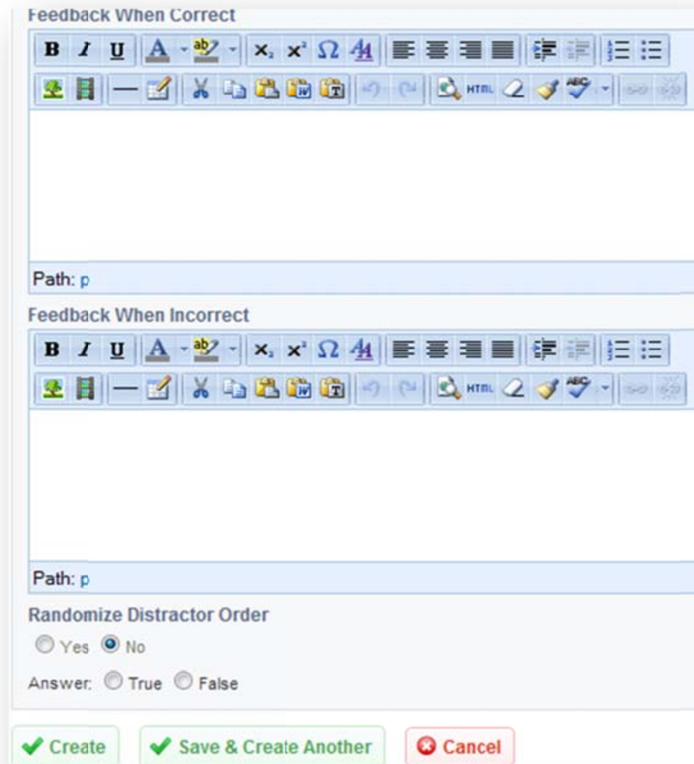
Field	Description
Code	If you enabled this option during set up, then this optional code can be used to uniquely identify the question to users, as question and response randomization options may otherwise obscure question identification. If left blank, then participants will see the empty question code.
Pool	If you have set up more than one pool for the section, enter the Question Text for each.
Order	The current order number of the question. You can use the drop down menu to change the order.
Question Text	Use the publishing window to design the question using whatever text and supporting files you want.
Feedback Correct/Incorrect	Use the publishing window to design optional feedback for the participant using whatever text and supporting files you want.
Randomize Distractor Order	Select "yes" if you want to randomize the order in which participants will see the answers.
Add Distractor	Click "Add Distractor" to increase the number of choices for participants to select as answers. You can have a maximum of 10 distractors.
Display Order	These are the numbers on the right that will be dragged over to rank items on the left.
Actual Order	Use the drop down menu to select the number that is the correct rank for the associated distractor text.
Distractor Text	For each distractor, enter the text that will be offered as an item for the participant to rank. Use the delete button to remove a distractor. Use the delete button to remove a distractor.
Create	This button will save the question and return you to the questions page.
Save & Create Another	This button will save the question and immediately start another new matching question.
Cancel	This button will return you to the questions page without saving the question.

True or False Questions

True or false questions force a participant to choose one of only two possible answers: true or false. There is only one correct answer to this type of question since only one statement is the correct answer. Here is how a true or false question would appear to participants:

Fill out the form to create a true or false question.



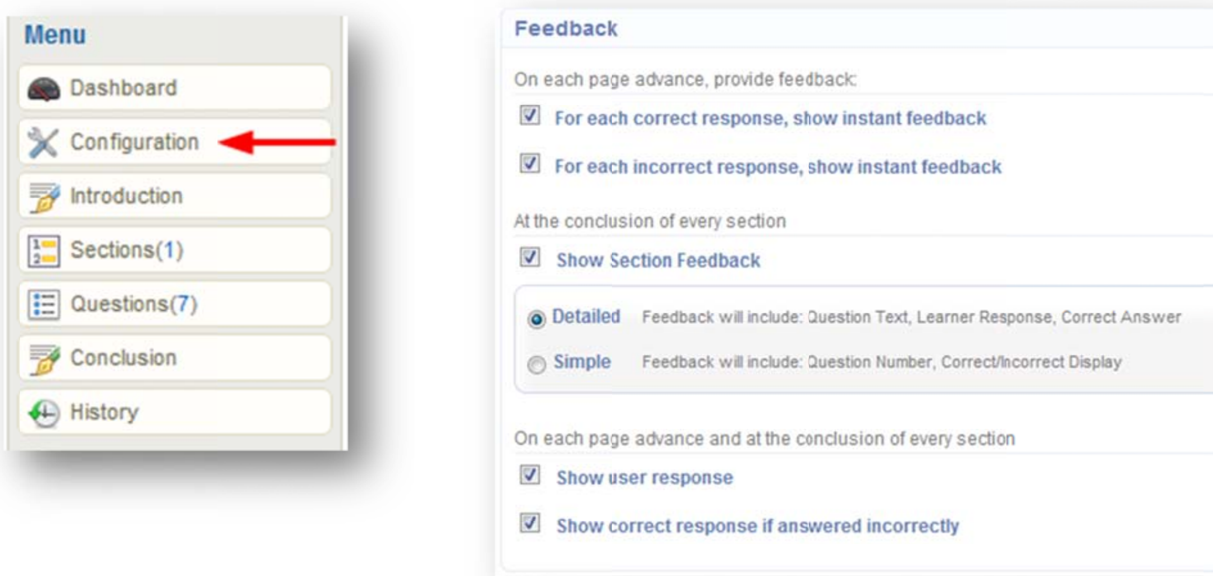


Below is a brief description of items on the create question form:

Field	Description
Code	If you enabled this option during set up, then this optional code can be used to uniquely identify the question to users, as question and response randomization options may otherwise obscure question identification. If left blank, then participants will see the empty question code.
Pool	If you have set up more than one pool for the section, enter the Question Text for each.
Order	The current order number of the question. You can use the drop down menu to change the order.
Question Text	Use the publishing window to design the question using whatever text and supporting files you want.
Feedback Correct/Incorrect	Use the publishing window to design optional feedback for the participant using whatever text and supporting files you want.
Randomize Distractor Order	Select "yes" if you want to randomize the order in which participants will see the answers.
Answer	Select the correct answer for this question: true or false.
Correct	Place a check before the correct answer correct answer.
Create	This button will save the question and return you to the questions page.
Save & Create Another	This button will save the question and immediately start another new multiple choice question.
Cancel	This button will return you to the questions page without saving the question.

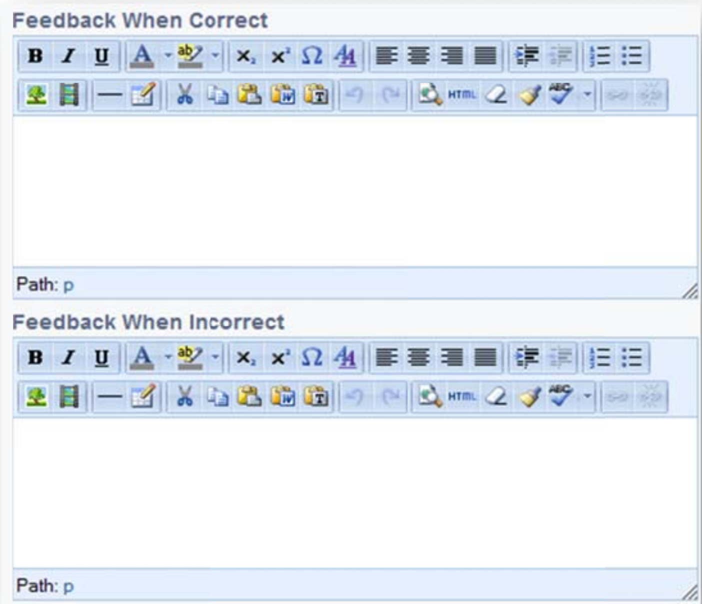
19.2.4 Feedback

Feedback is an option that allows you to give simple or customized feedback to your users as they answer questions in the test. Feedback can be set up for each question or page of questions that they answer, at the end of the section, or both. You must ensure that feedback is enabled for your test: open the test and then click the **configuration** option from the menu. Scroll down to **feedback**. For more details on feedback configuration, see the Configuration Options section of this chapter.

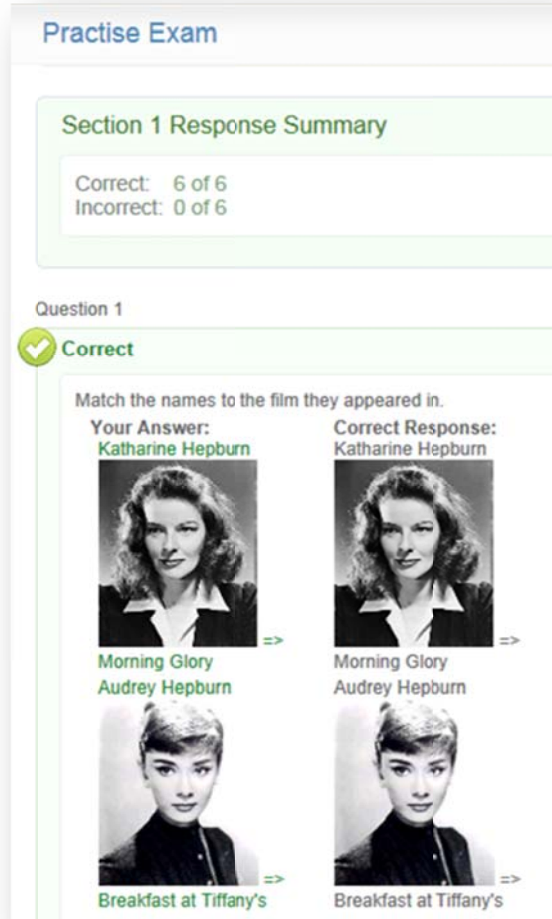


Ensure that feedback is enabled from the configuration page.

When creating the question, use the feedback publishing windows to design optional feedback for the participant using whatever text and supporting files you want.

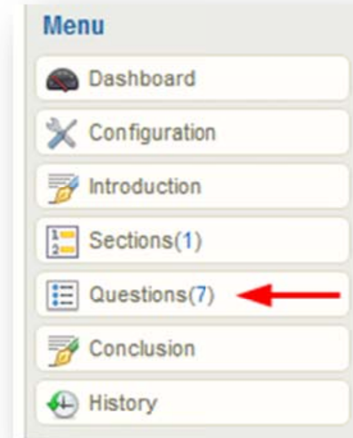


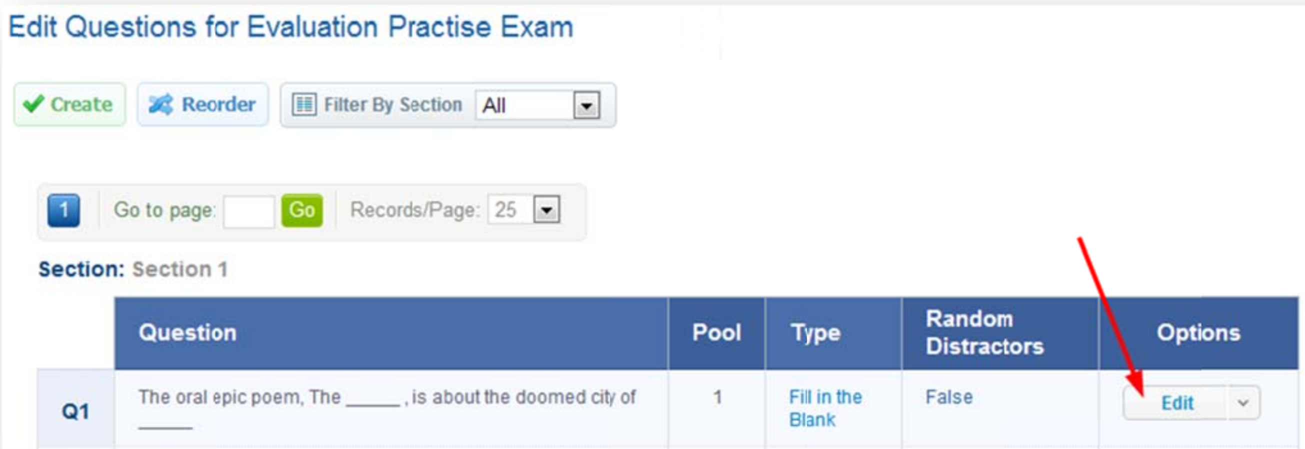
Here is an example of a participant receiving simple feedback at the end of a section. The example shows only the first question.



19.2.5 Edit Questions

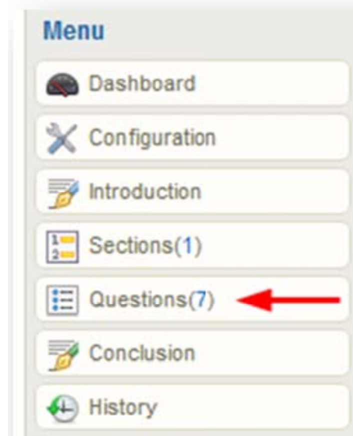
Open the test that contains the question you wish to edit, and then click the **questions** option from the menu to open the edit questions page. Click the **edit** button next to the appropriate question, make your changes, and then click the **update** button.

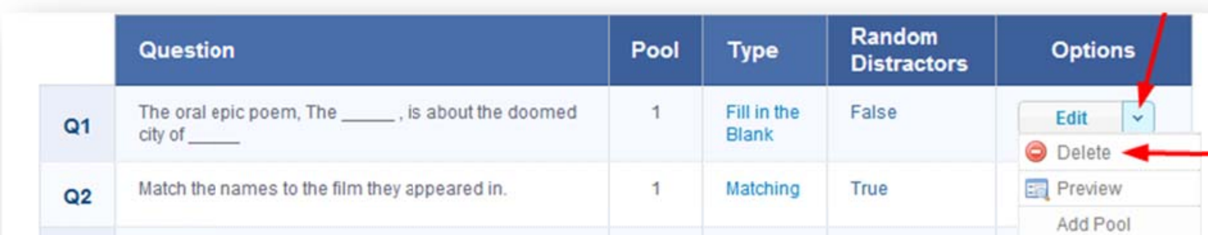




19.2.6 Delete Questions

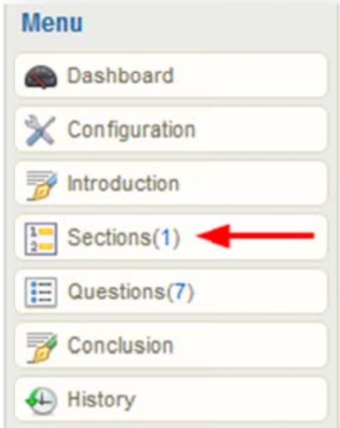
Open the test that contains the question you wish to delete, and then click the **questions** option from the menu to open the edit questions page. Click the **down arrow** on the edit button next to the appropriate question to reveal more options, and then click the **delete** button.





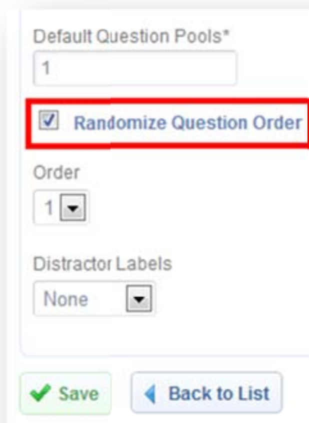
19.2.7 Randomize Question Order

Test questions are assigned an automatic number as you create them. This is the default order in which they are presented during a test. You can instead choose to have the questions presented in a random order. Open the test that contains the question you wish to delete, click the **sections** option from the menu, and then click the **edit** button to open the edit section page.



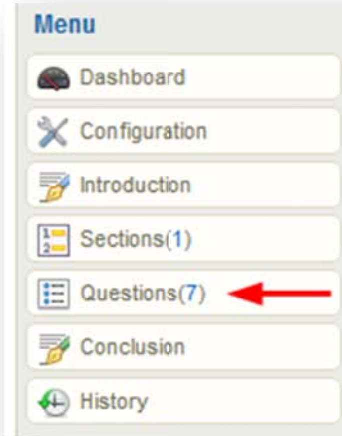
Opting to randomize questions will affect all questions within that section.

Click the box to insert a check mark in front of **randomize question order**. To unrandomize question, click the box to remove the check mark. If you have created multiple pools, every question variation in pools, every question variation in that pool will stay with the appropriate question number, even when randomized and only one of the pools will be presented during the test.

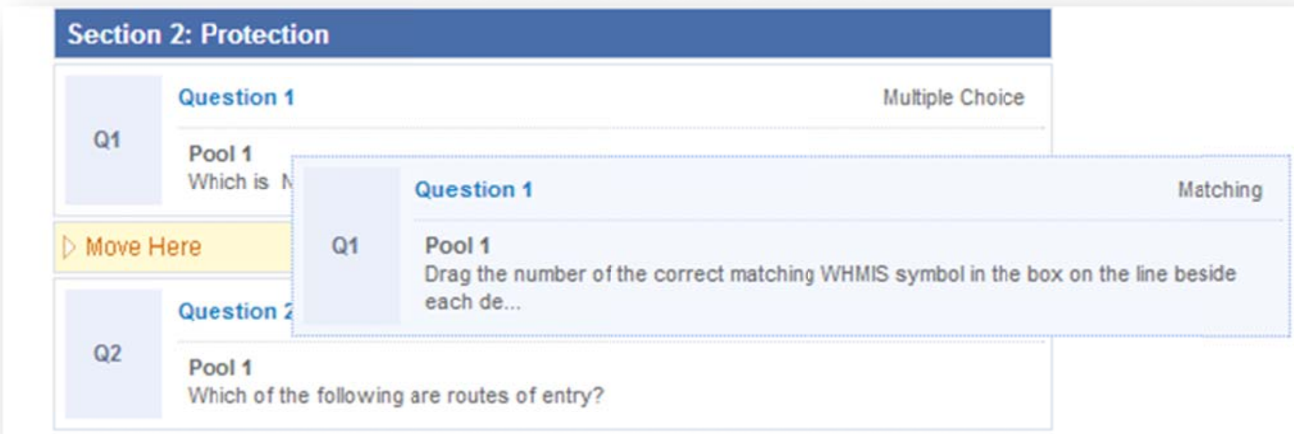


19.2.8 Reorder Questions

Open the test that contains the questions you wish to reorder, click the **questions** option from the menu to open the edit questions page, and then select the **reorder** button.

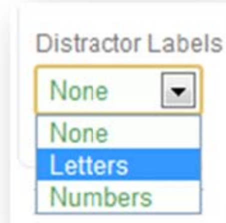


Drag the question to where you wish to move it and drop it into a new spot within the list. You can even move the question to a different section. Click **save order** when done.

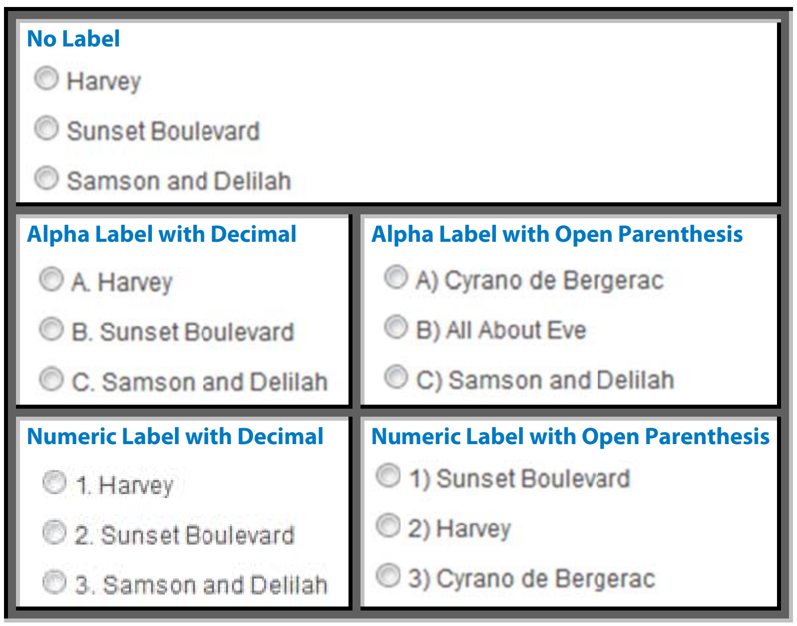


19.2.9 Distractor Labels

Open the test that contains the questions you wish to add distractor labels to, select **sections** from the menu, and then select **Edit** to open the edit section page. Use the drop down menu to add or remove alpha or numeric distractor labels to the answer options.



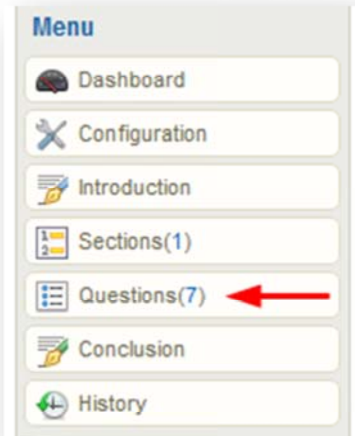
Below is an example of the same multiple choice question set up using each different distractor label:



Adding distractor labels will add them to all eligible questions within that section. Essay and fill in the blank questions do not have

19.2.10 Randomize Answer Order

You can choose to randomize the order in which participants will see the answers (distractors). Open the test that contains the question you wish to randomize answers for, and then click the **questions** option from the menu to open the edit questions page. Click the **edit** button next to the appropriate question, move down the page to **Randomize distractor order**, select **yes** next to randomize distractor order, and then click the **update** button. To unrandomize distractors, click no next to randomize distractor order.



Note that answer order cannot be randomized for fill in the blank or essay questions.

19.2.11 Question Pools

A question pool lets you provide up to five alternate versions of a question, only one of which is randomly presented during the test. Using pools, you can ask participants the same question, but asked in different ways. When using more than one pool:

- Participants taking the same test will not necessarily be answering the same version of a question.
- Participants retaking the same test may get a different version of the question during new attempts.

Questions automatically have one pool. If you have only the one question pool, then all participants will see the same question.

For example, imagine that you want to ask participants about the chemical composition of water:

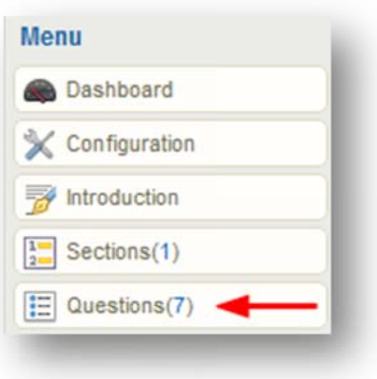
Question #1		
Pool 1	The chemical composition of pure water it H_2O.	True or False
Pool 2	Pure water contains two hydrogen atoms.	True or False
Pool 3	There is one oxygen atom in a pure water molecule.	True of False

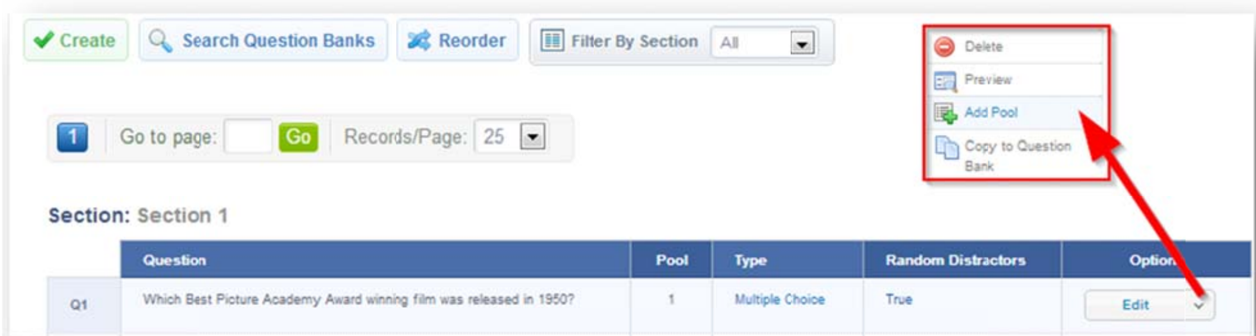
Each pool is still question #1 and only one will be presented during the test.

Add a Pool to an Existing Question

To add pools to an existing question:

- Navigate to **Questions**
- Select the **down arrow** on the edit button for the relevant question
- Select **Add Pool**

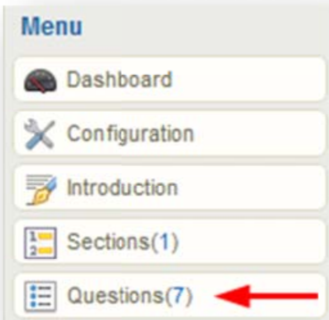


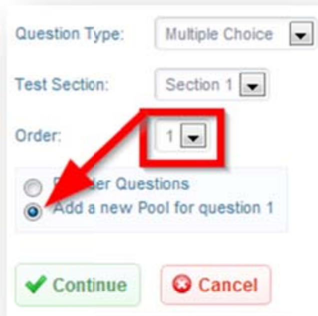


Add a New Question as a Pool to an Existing Question

While creating a new question, you can opt to add it as a pool to an existing question.

- Navigate to **Questions** and then **create** a new question
- Select the **Question Type**
- Change the **order** number to match the destination question
- Select **add a new pool for question #**



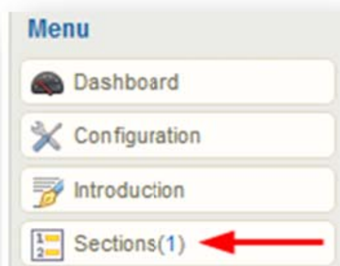


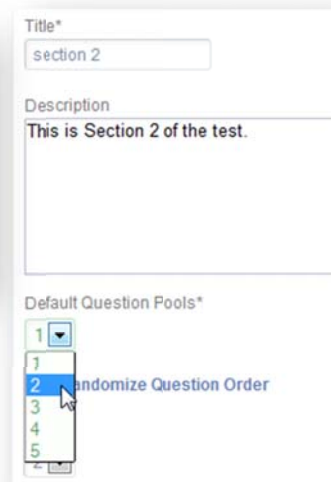
This option also lets you create a different question within the pool.

Create a Number of Default Pools

Default pools let you define how many pools will be available for every question within a section. New questions created within that section will automatically have the pools available. To specify a number of default question pools:

- Navigate to **Sections**
- **Create** or **edit** a section
- Select a number of pools (1-5) under **Default Question Pools**.





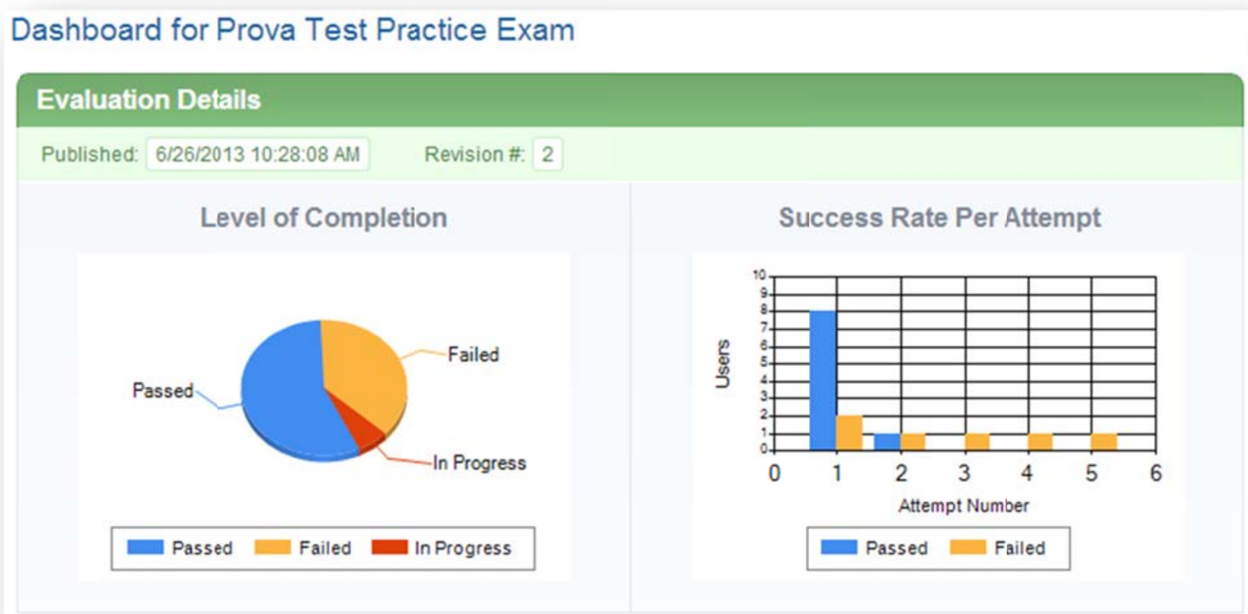
Default pools are all the same question type.

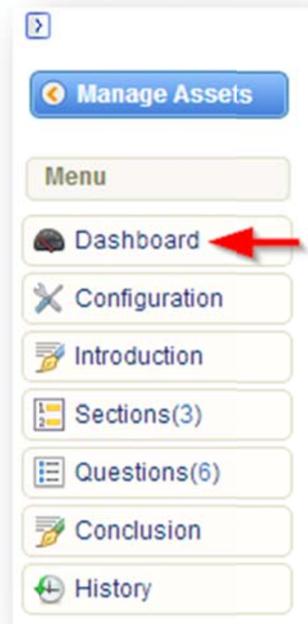
To create another question type, see *Add a New Question as a Pool to an Existing Question*.

19.3 Dashboard

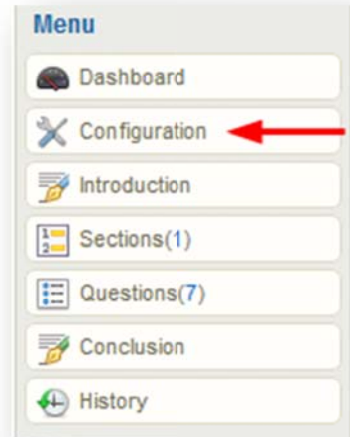
The dashboard shows you some basic at-a-glance analytics for the test. The **Level of Completion** graph shows passed, failed and in progress information for participants who have launched the test. The **Success Rate per Attempt** bar chart shows how many times participants attempted the test and the number of participants who passed and failed.

The dashboard is the landing page for any test that has been published and you can always navigate back by selecting **Dashboard** from the Menu.





19.4 Configuration: Modifying the Test Setup

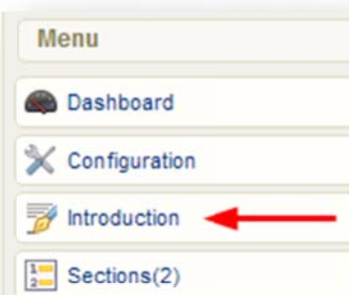


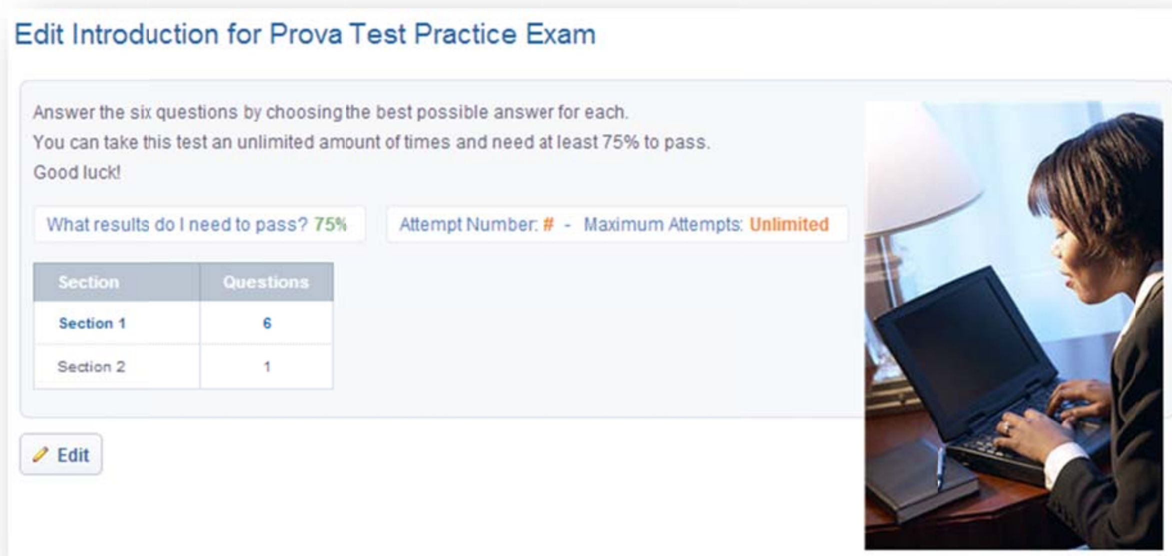
You can change the details of how a test is set up by clicking the Edit link in the Details menu from any test. This will open the Attributes page where you can make changes and then save them.

Open the test that you wish to make changes to, and then click the **configuration** option from the menu. Make any changes you need on the form, and then click the **save** button at the bottom of the page. For a more details about each configuration, please see earlier in this chapter under Configuration Descriptions.

19.5 Introduction Page

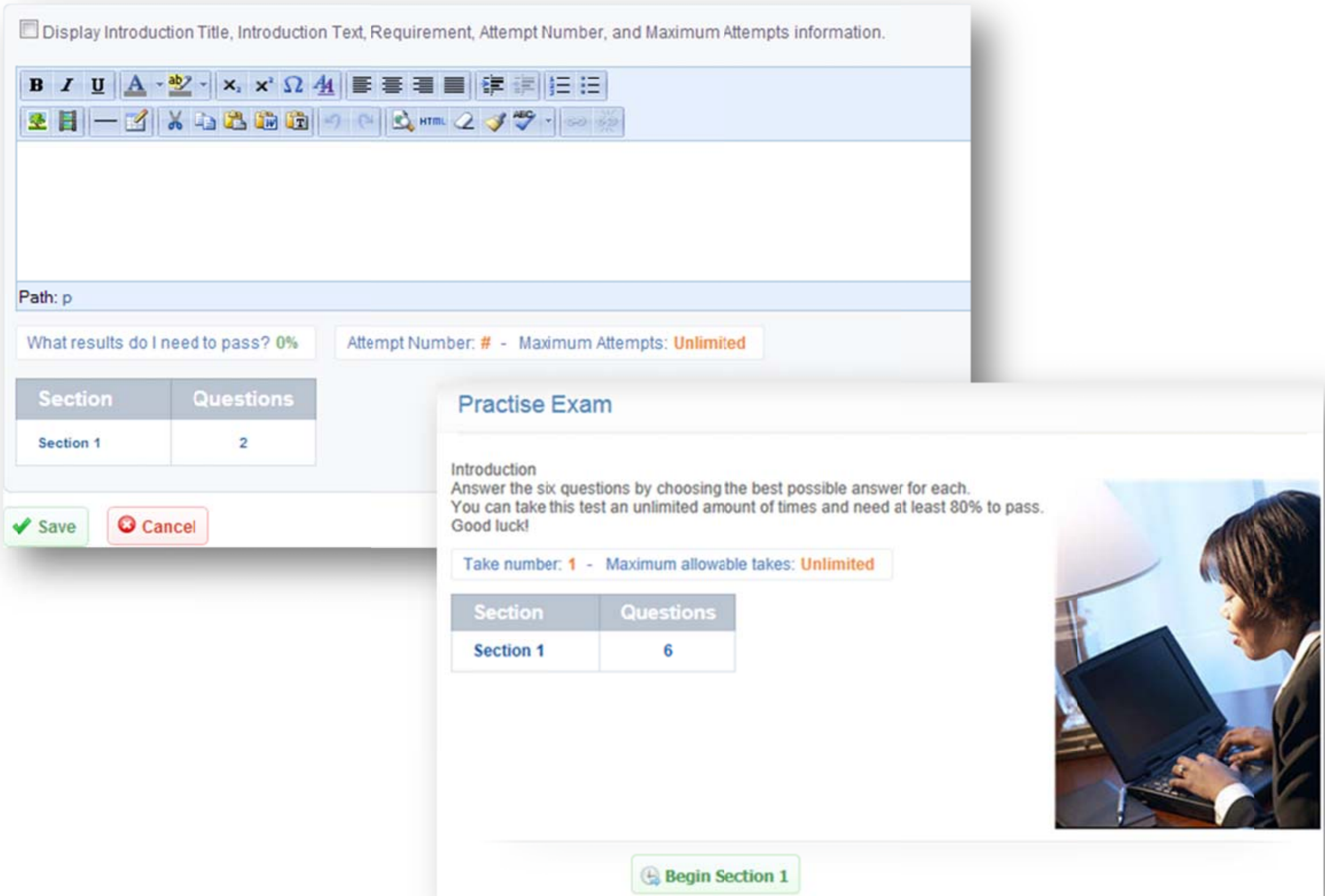
If the test is configured to show an introduction, then an introduction page will be displayed to participants after the identity confirmation screen (if enabled) and before the test questions. The default introduction screen will show which take number the participant is on, how many attempts they are allowed, number of sections, and the number of questions in each section. You can also include a custom introduction message to appear above the default introduction: open the test , click the **introduction** button from the menu, and then click the **edit** button.





This will open a publishing window where you can design your custom introduction. You can also choose to turn the introduction off completely, by using the check box at the top. Click the **save** button when you are happy with the design.

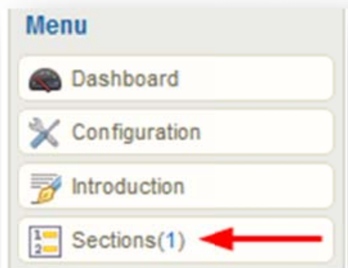
Add a custom introduction by entering content into the publishing window.

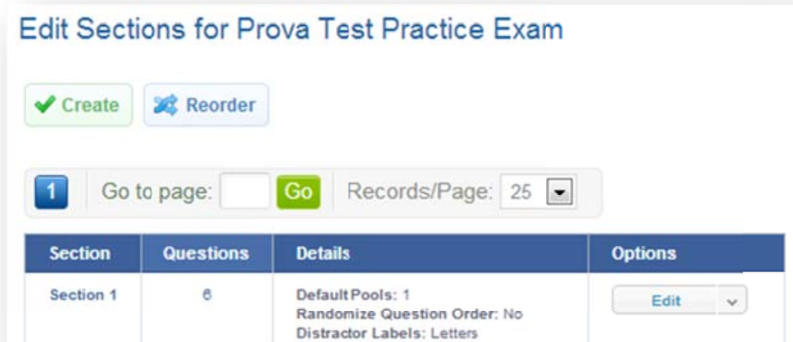


Here is an example of a custom introduction as it appears to participants.

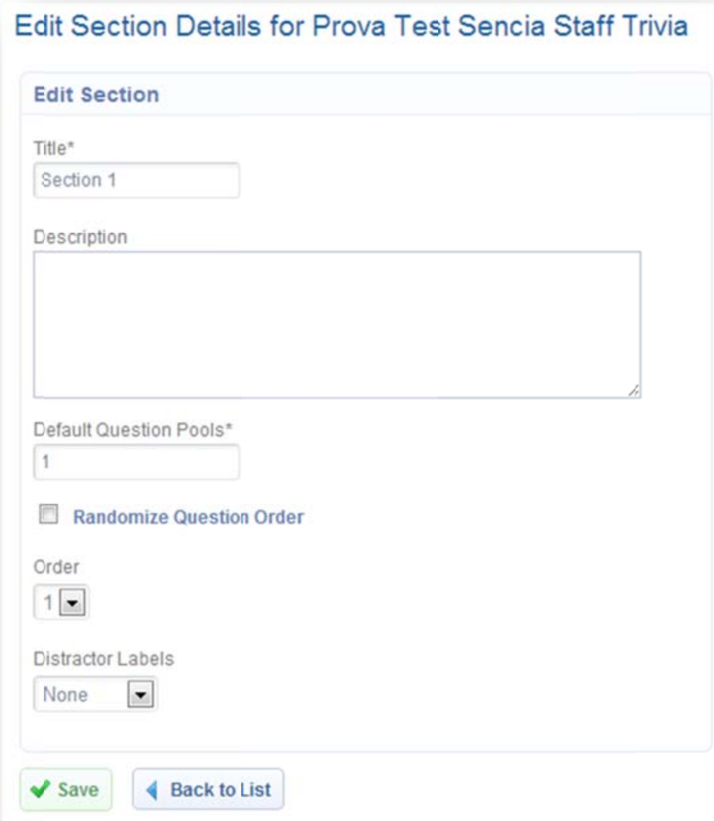
19.6 Test Sections

Open the Prova test and then select **Sections** from the menu to view all of the sections set up for this test, along with a summary of details about each section. From here you can add, rename, or reorder sections. The table below explains each component of the edit section page.



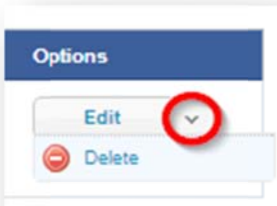


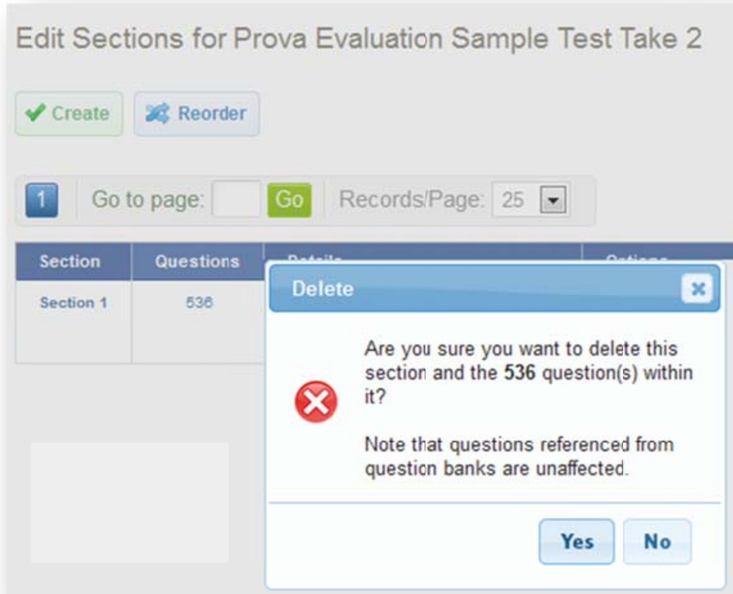
Field	Description
Create	Click **Create** to add new sections. One section is created automatically by default. Fill out the form: • Title & Description: Enter the name of the section and an optional description that is visible to participants • Default Question Pools: choose the number of question pools questions in this section • Randomize Question Order: Check the box to randomize the question order, uncheck to unrandomize • Order: use the drop down reorder the section (refer to reorder below) • Distractor Label: add or remove alpha or numeric distractor labels to the answer options
Reorder	For tests that test by individual section, you can select reorder to change the order sections are presented to participants.
Section	This is the name of the section. Many of the test setup modes give the section a default name during creation. Click the name to open an edit page where you can change the name.
Questions	Indicates how many questions are in the section. Click the number to view the questions themselves.
Details	Status: list if the section is active or inactive Default Pools: shows how many pools were set up for this section Randomize Question Order: Indicates whether or not the questions are randomized Distractor Labels: Indicates whether or not alpha or numeric labels are used in front of the answer options.
Options	Click the edit button to open an edit page where you can edit title, description, pools, status, randomization, order and labels. Click the arrow to the right of the edit button to reveal the delete button.


Edit Section Details for Prova Test Sencia Staff Trivia
Edit Section
Title*
Section 1
Description
Default Question Pools*
1
Randomize Question Order
Order
1
Distractor Labels
None
Save
Back to List

Delete a Section

To delete a section, select the **arrow** next to the edit button and then select **delete**. When deleting a section you will be asked to confirm. The confirmation summarizes what is selected for deletion including the section name and how many questions are within it.



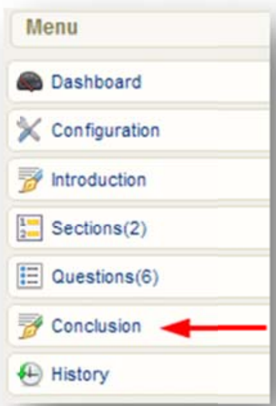


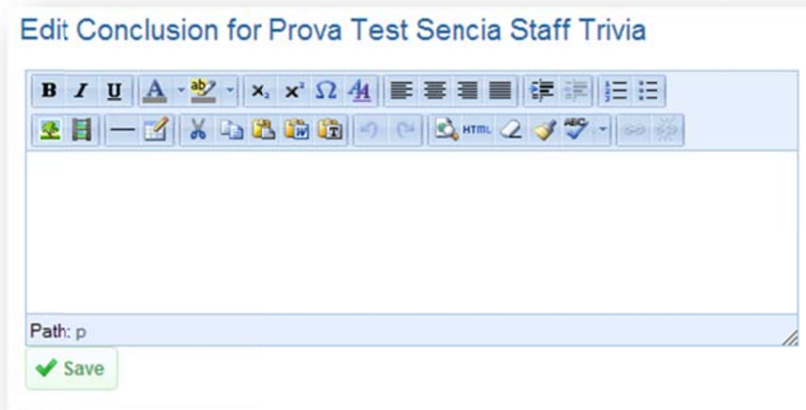
Deleting a section will also permanently delete questions within the section, unless the questions are populated from question banks or added to a bank before deleting the section.

When deleting sections with a large amount of questions, a progress bar displays below the create and reorder buttons.

19.7 Conclusion Page

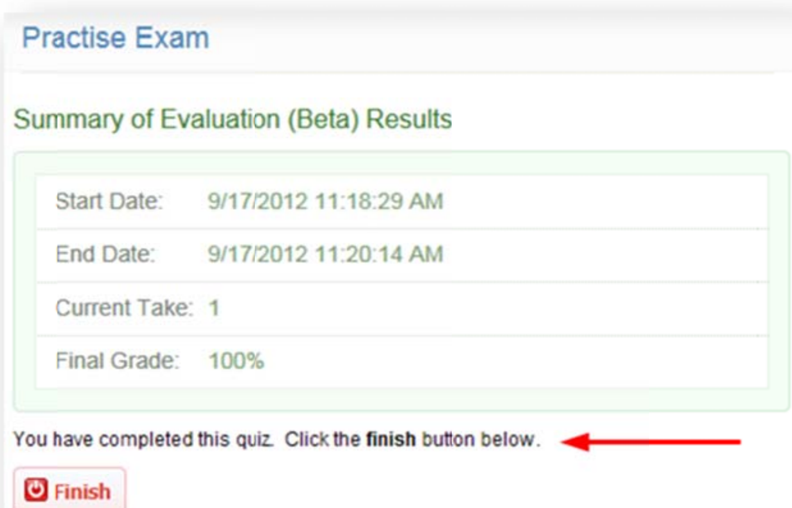
The optional test conclusion page appears after the participant has completed all of the test questions. To add a custom conclusion after the test summary, open the test, click the **conclusion** button from the menu, and then use the publishing window to design the text and content you want the participants to see after they have completed the test. Click **save** when you are happy with your content.





The conclusion is a great place to let your participants know what their next steps should be after completing the evaluation.

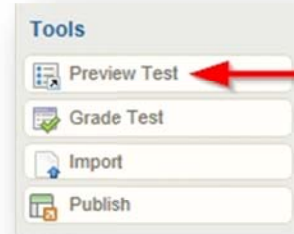
This example shows how a participant sees the conclusion. The summary is default content and the indicated text at the bottom is custom content.



19.8 Preview Test

This is available to campus admins and publishers.

We recommend that you preview a new test so that you can view how participants will see it and ensure that it looks and functions as you intend it to. Open the test that you wish to preview and then click **Launch Test** from the tools menu. This will let you attempt the test without worrying about the system retaining any records for the attempt.

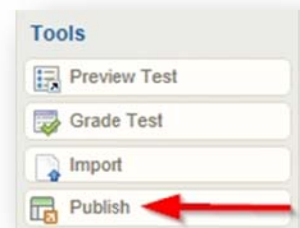


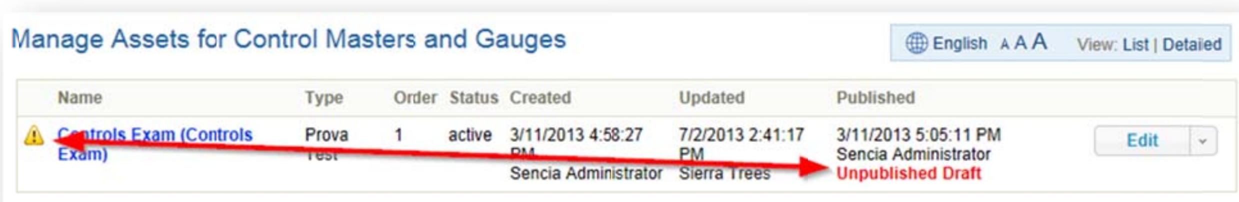
The launch button is currently available only for campus admin and publisher user types. We expect to add this functionality for Site Managers in future development.

19.9 Publish

This is available to site managers, campus admins, and publishers.

To make a new test available to participants, it must be published. Any revisions that are made will also need to be published before participants can see them. To publish a test, open the test and then select **Publish** from the tools menu. The Publish option will be greyed out and unavailable if there are no pending revisions. Each publish retains its own version so you can determine which version participants took, if necessary. Tests with unpublished drafts are indicated on the manage assets page of the product with an exclamation mark and text.

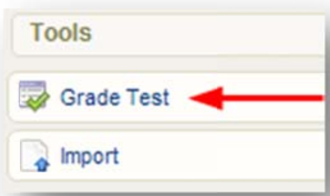


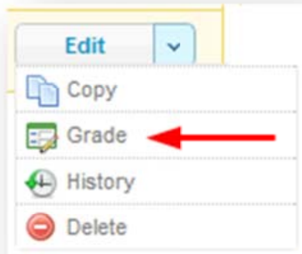


19.10Manual Grading

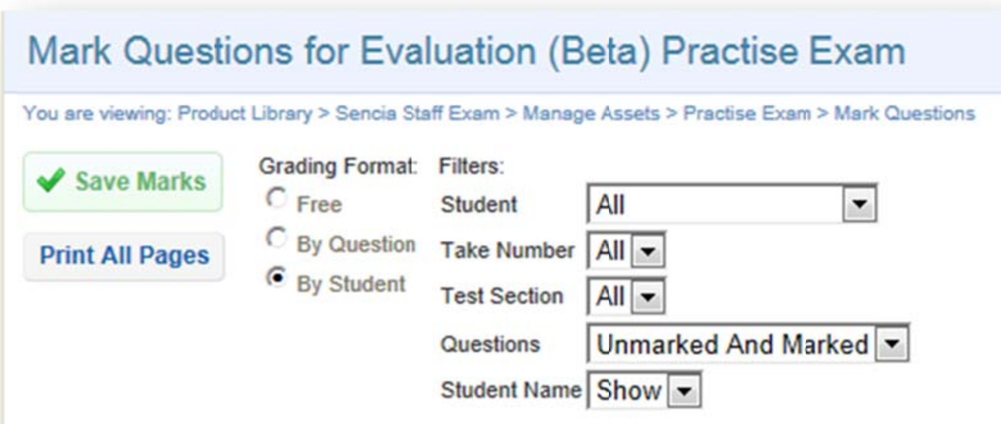
This is available to site managers, campus admins, publishers, and instructors.

This option is used to grade essay questions (essay questions cannot be automatically graded by the system) or by site managers who need to override a participant's answer. Open the Prova Test, and then click the **grade test** button from the tools menu. Alternatively, you can click the arrow next to a question's edit button to reveal the **grade** button.

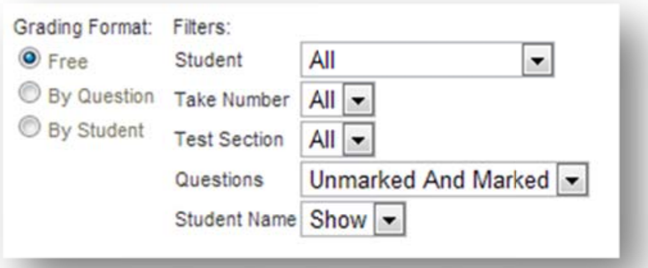




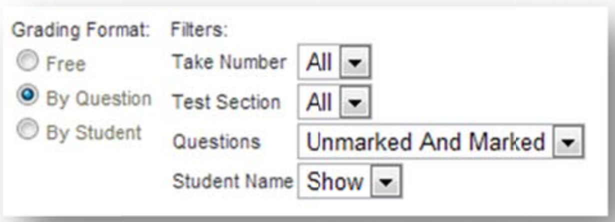
This will open the "Mark Questions" page for the selected test. You have three grading formats to choose from: Free, By Question, and By Student.



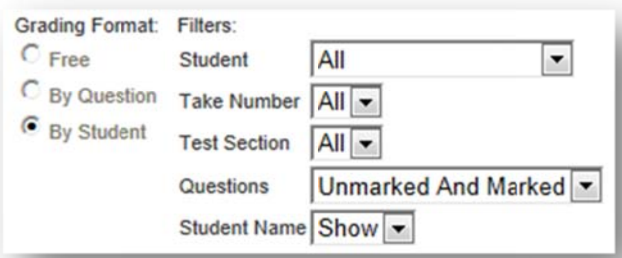
1. Free is solely based on the filters and has no navigation once those items are filtered. This method is best used when you have very specific criteria to filter and expect only that specific result. Enter a grade in the **mark** field and then click **update mark**.



2. By Question lets you use the drop down menu to select one question to mark at a time. You will see the list of students for one question, and buttons for the next and previous question. Enter a grade in the **mark** field and then click **update mark**.



3. By Student lets you use the drop down menu to grade one student at a time. You will see the list questions for one student, and buttons for the next and previous student. Enter a grade in the **mark** field and then click **update mark**.



4.

20. Questionnaires

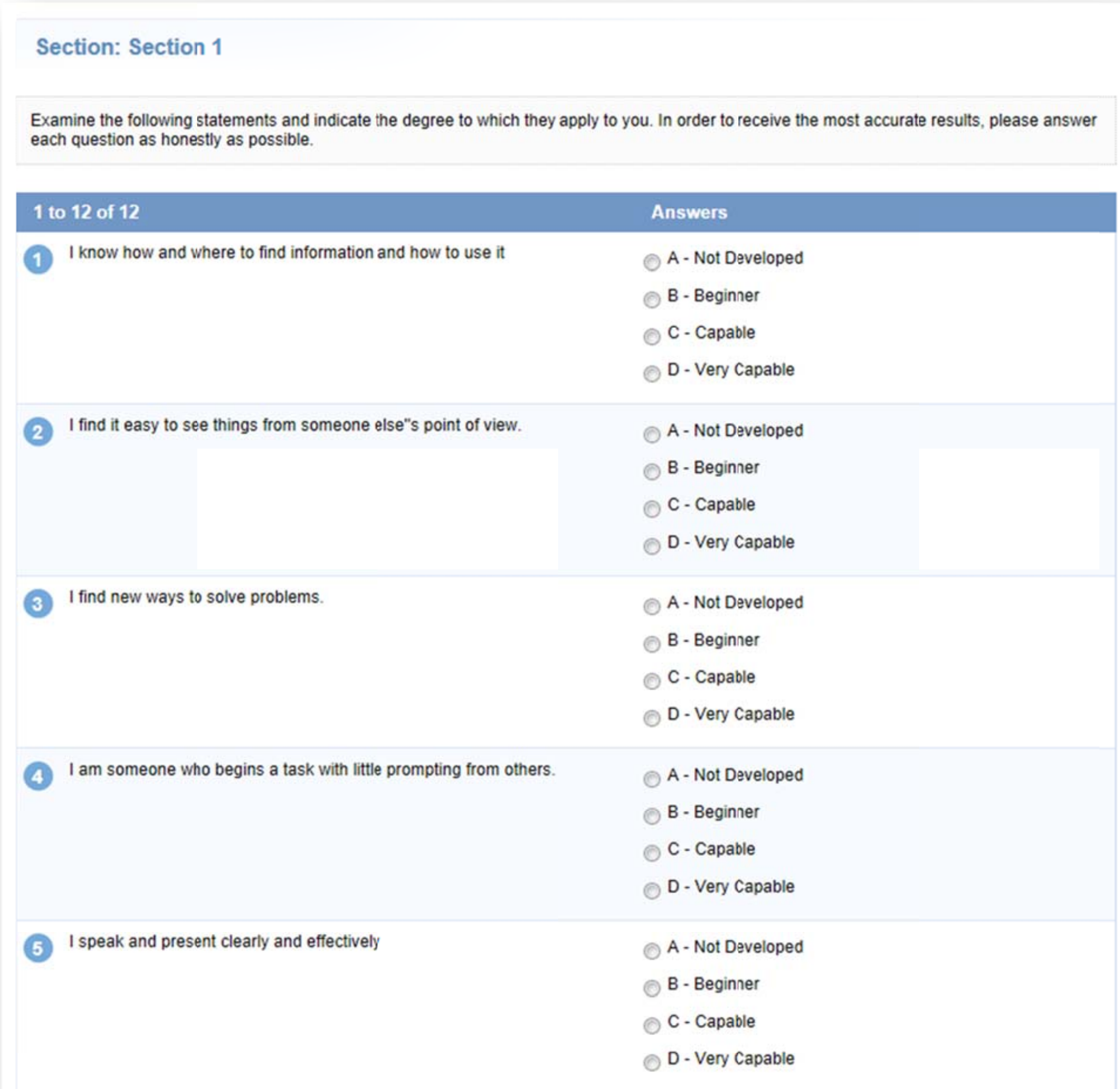
Questionnaires are an informal way to measure something about your participant by posing content where there is no right or wrong answer. Questionnaires are often an objective way to measure things like professional strengths and weaknesses, time management abilities, goals or aptitudes. Questionnaires can also be used as a survey tool to measure something, like online course satisfaction.

Topics Covered In This Chapter

Within Informetica, a questionnaire is created using bucketed questions. This bucketed style allows you to apply categories to each question that are not immediately known to the person taking the questionnaire. If desired, you can assign points to the predetermined responses (distractors) and then see the total score a user has received for any specific bucket, otherwise you can leave these values at 0. The values can be used to do more in depth assessment of an individual. For example, say you are pre-screening candidates for a job interview. You can assign values to each distractor to determine how strongly the candidate scored in specific categories. That way if you are hiring for someone strong in Communications skills, you can select the individuals who scored highly in Communications.

A report run on a questionnaire provides scores for each questionnaire bucket for each user's section and take of the questionnaire. The report quickly summarizes:

- Which of their employees are taking the questionnaire and how many times they attempted the it,
- The date of employees' last completion,
- Each employee's response "score" (i.e. level of competency within a given skill set).



Section: Section 1

Examine the following statements and indicate the degree to which they apply to you. In order to receive the most accurate results, please answer each question as honestly as possible.

1 to 12 of 12	Answers
1 I know how and where to find information and how to use it	A - Not Developed B - Beginner C - Capable D - Very Capable
2 I find it easy to see things from someone else"s point of view.	A - Not Developed B - Beginner C - Capable D - Very Capable
3 I find new ways to solve problems.	A - Not Developed B - Beginner C - Capable D - Very Capable
4 I am someone who begins a task with little prompting from others.	A - Not Developed B - Beginner C - Capable D - Very Capable
5 I speak and present clearly and effectively	A - Not Developed B - Beginner C - Capable D - Very Capable

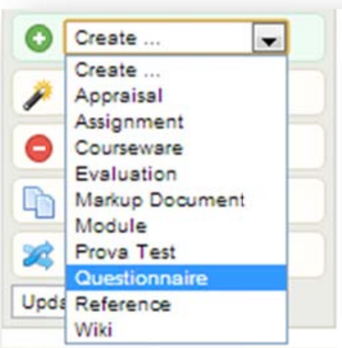
An example of a Likert style questionnaire set up in Informetica.

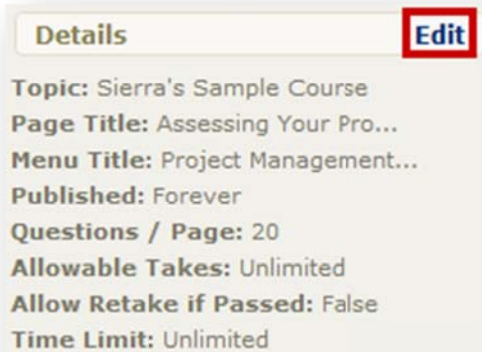
20.1 Create a Questionnaire or Edit Details

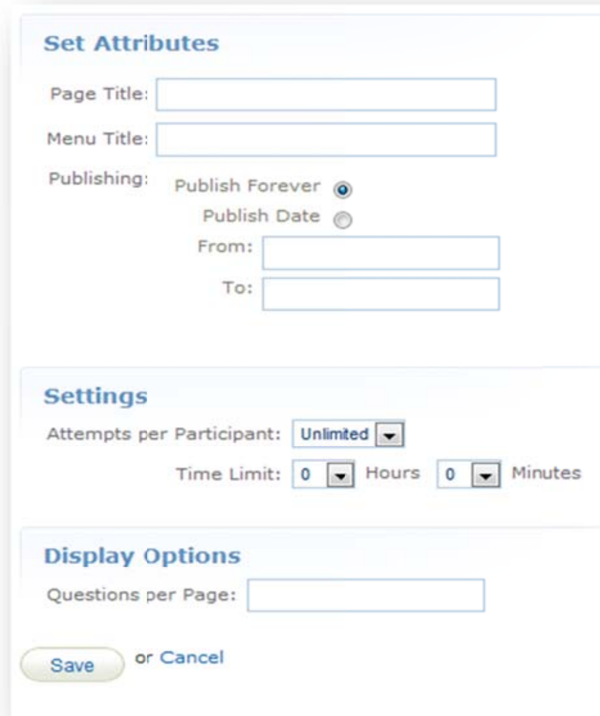
To fully create a questionnaire you will need to complete the following steps:

- ✓Create a questionnaire
- ✓Create questionnaire buckets
- ✓Create questionnaire sections
- ✓Create bucketed questions within questionnaire sections

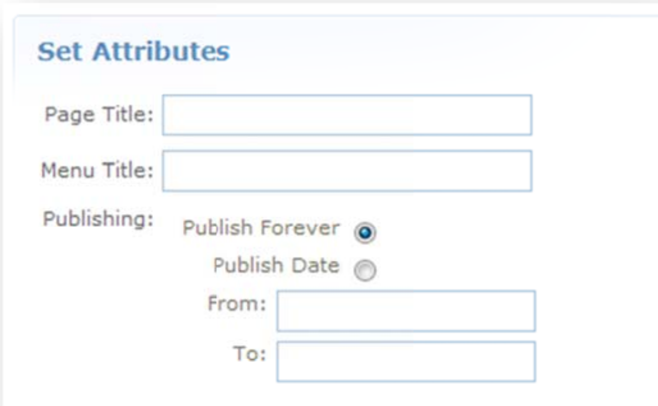
From the manage assets page for a product, click on "create" under the options menu. Select questionnaire from the dropdown menu to open the create questionnaire page. To edit details for an existing questionnaire, click the name of the questionnaire from the manage assets page and then click the edit link in the top left.







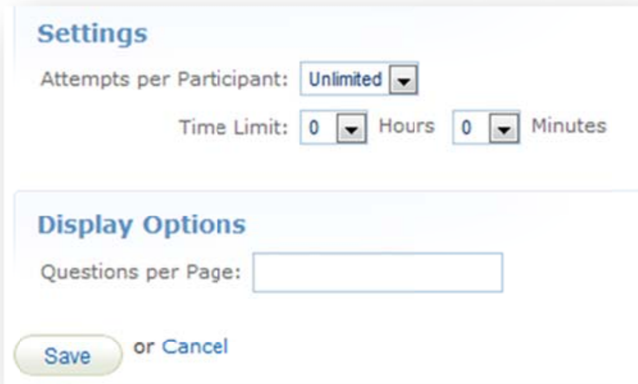
20.1.1 Attributes and Settings



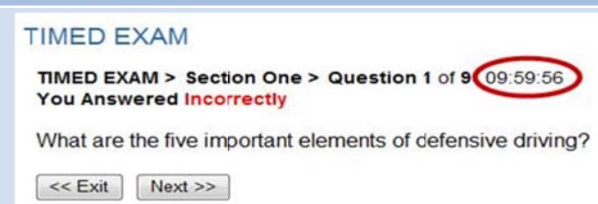
Below is a brief description of the fields:

Field	Description	Input
Page Title	Enter the name of the questionnaire. The page title will show up on the top of online content pages.	Required
Menu Title	The menu title is what shows in the assets list and in side menus. Note that menus have a limited amount of display; the longer your menu titles, the more cramped menu displays will be.	Required
Publish Date	Select publish forever if you want the questionnaire to be always available or select a specific publish date if your questionnaire will be unavailable during or before a certain date. A questionnaire that is published forever is available to all participants with access. A questionnaire that is published for specific dates is also available to all participants with access, but only during the published dates. If the questionnaire falls before or after the published dates, registered participants would no longer see the questionnaire.	Optional

20.1.2 Settings and Display Options

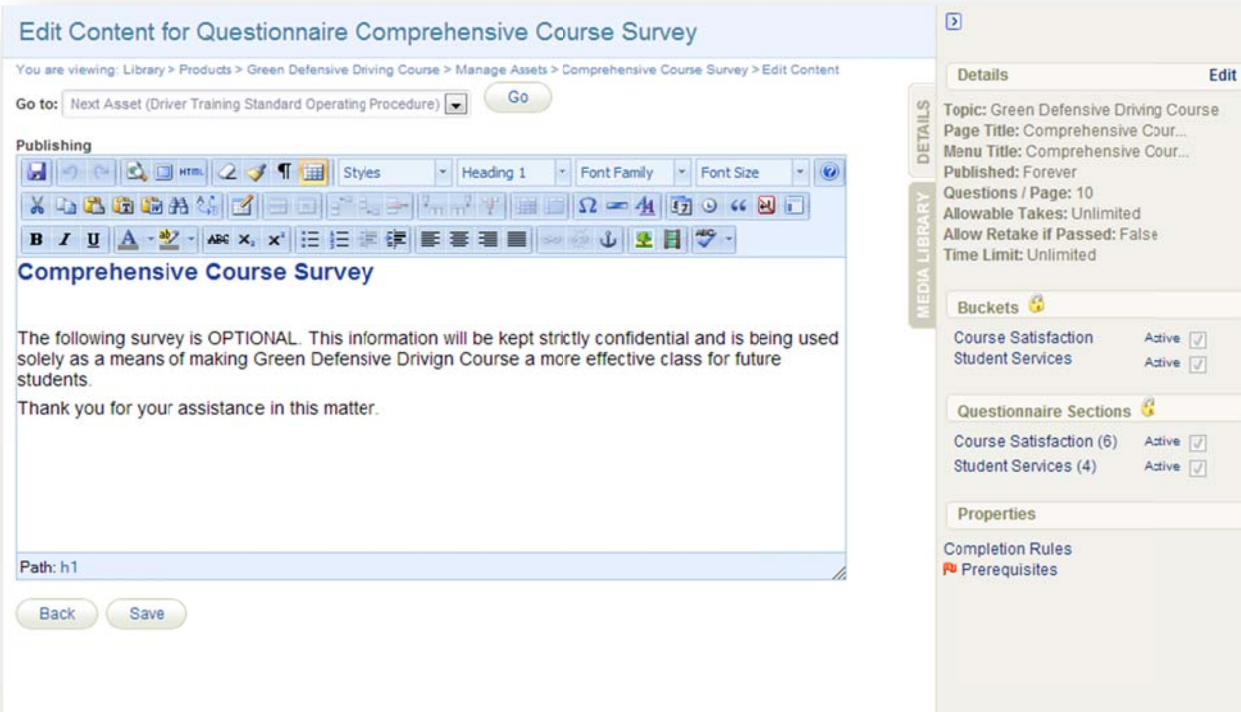


Below is a brief description of the fields:

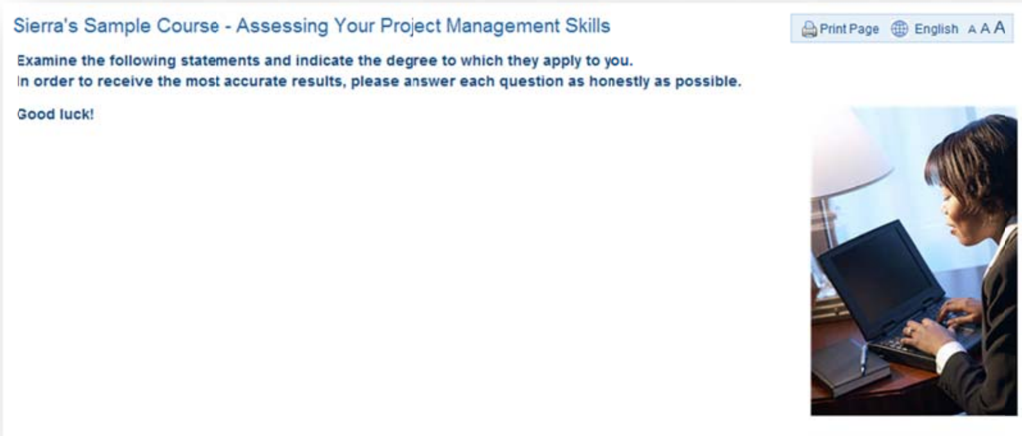
Field	Description	Input
Attempts per Participant	Select the number of times a participant is allowed to take this questionnaire (1-5 attempts or unlimited).	Optional
Time Limit	You can restrict the length of time allowed to complete the questionnaire by selecting from the dropdown menus. The amount of remaining time will appear to the participant at the top of every question page. 	Optional
Questions per Page	Enter the number of questions you want displayed on each page of the questionnaire for the participant to see.	Optional
Save	This button will save your changes and create the new questionnaire. Once you have saved the questionnaire, you are brought to the manage assets page.	Required
Cancel	This button will return you to the manage assets page without creating a new questionnaire.	Optional

20.2 Create or Edit a Custom Introduction

A questionnaire has a default introduction page that shows the participant the name of the questionnaire and a start button. From the manage assets page, open the questionnaire in which you would like to create the custom introduction. This will bring you to a publishing window where you can customize an introduction to the questionnaire. To edit an existing introduction, open the questionnaire and make your changes in the content editor.



The example below shows how a participant would see this:



20.3 Create Buckets

After creating a questionnaire, you need to create at least one new bucket for it. From the manage assets page, click on the questionnaire that you wish to create a bucket for. Click the create link on the side bar under the buckets menu. Enter a name for the bucket and click the save button. After saving, you will be returned to the questionnaire's edit content page.

20.4 Create Sections

After you have created a bucket you will need to create at least one new section. Open the questionnaire and click create next to the questionnaire sections menu to open the create new questionnaire section page. To edit these details, click on any section name to open it, make changes and then save. Every field indicated with a red asterisk * requires an entry to successfully create a section.

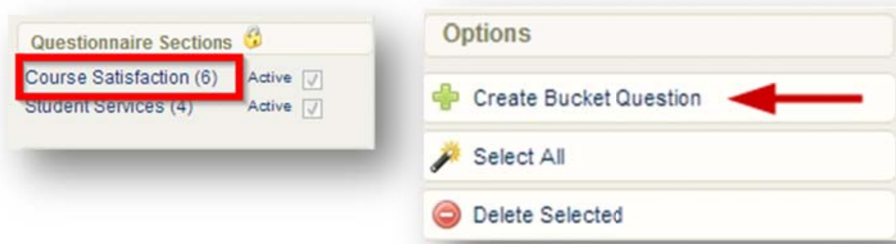
Below is a brief description of the fields:

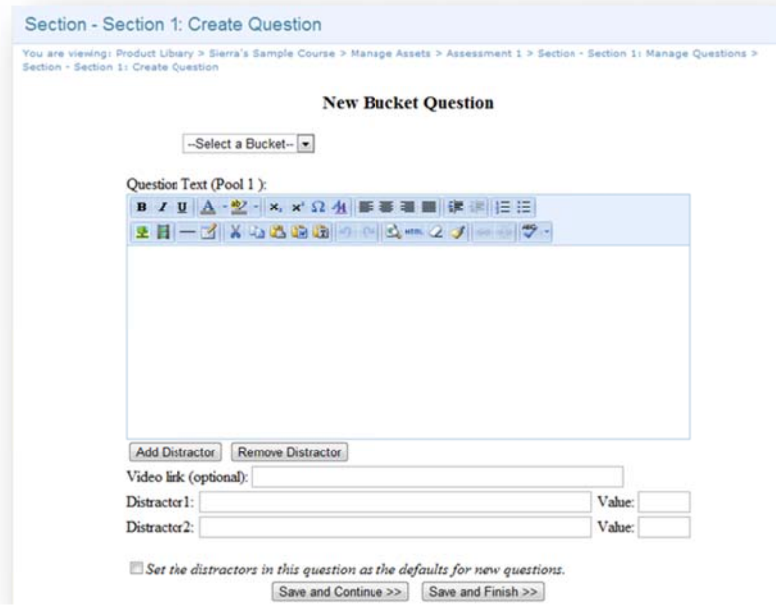
Field	Description	Input
Name	Enter a name for the section	Required
Distractor Label	Distractor labels precede the list of answers offered as choices for the participant so they can select an option. Use the drop down menu to select letters or numbers.	Optional
Section Description	Add an optional description for the section.	Optional
Save	This button will save your changes and create the new section. Once you have saved the section, you are brought to the publishing window for the appraisal.	Required
Cancel	This button will return you to the publishing window for the appraisal without creating a new section.	Optional

Sections must be active before participants will be able to see them. Once a questionnaire is made available to participants, you will no longer be able to add or edit sections. However, you can edit the bucketed questions themselves.

20.5 Create Bucket Questions

After you have created buckets, you can create questions. From the manage assets page, click on a questionnaire and then click the section within it that you wish to create bucketed questions for. Click the create bucket question link on the options menu on the right to create the first question. To edit questions, click on any section name to open it, click the edit link next to any question and then save.



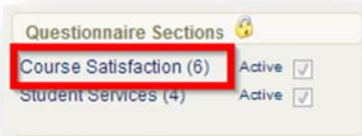


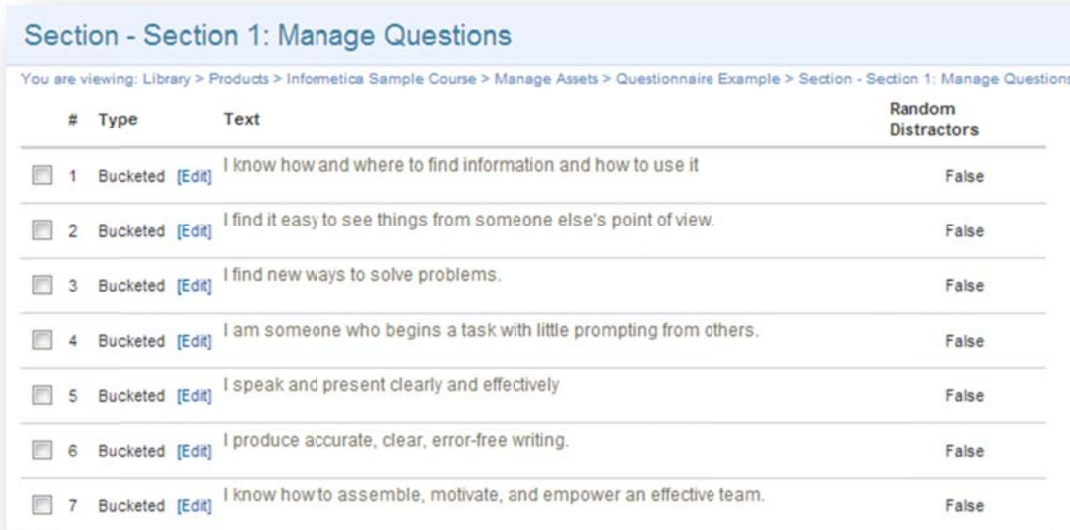
Below is a brief description of the fields:

Field	Description	Input
Select a Bucket	From the drop down menu, select one of the buckets that were created earlier.	Required
Question Text	Use the content editor to design the question with text and supporting files.	Required
Add Distractor	Use the add button to create more distractors for the question.	Optional
Remove Distractor	Position your cursor within the distractor text field and click the remove button.	Optional
Video Link	You can insert a link to an uploaded video in this field.	Optional
Distractor	Enter the text for the responses offered as choices for the participants in these fields.	Required
Value	Enter a number value for each distractor. If you do not wish to use values, enter 0. Negative numbers are not recognized.	Required
Set the Distractors	Select this box if you would like the same distractors to appear on all of the questions.	Optional
Save and Continue	Save you r changes and continue creating more questions for this appraisal.	Required
Save and Finish	After saving, you will be returned to the section: manage questions screen.	Optional

20.6 Manage Questions

Click the Section link from the Questionnaire Sections menu for the section that you wish to edit questions in. This will open the manage questions page.





 # – Questionnaire questions are assigned an automatic number as you create them. This is the default order in which they are presented during a questionnaire.

Type – For questionnaires, this type of each question is always bucketed.

Text – The text of the question itself as the participant sees it.

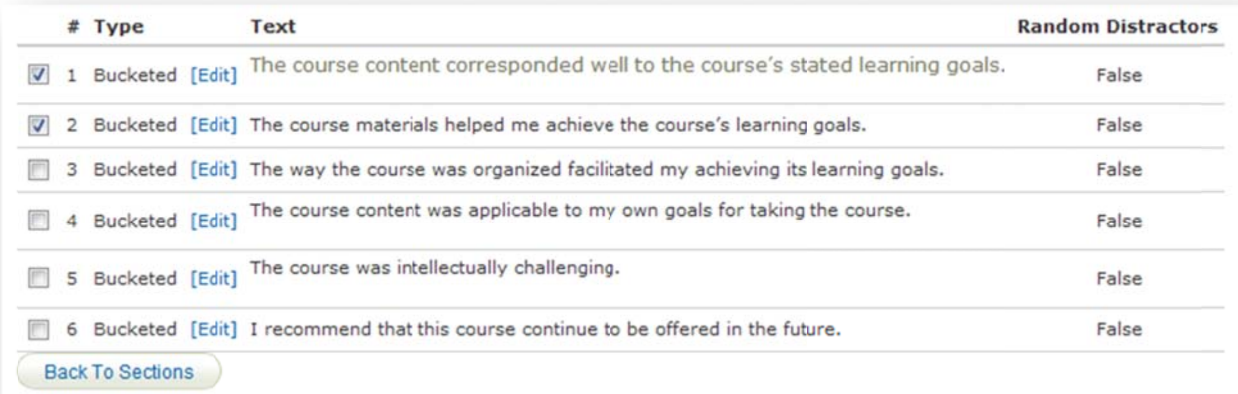
Random Distractors – Indicates whether or not the distractors for each question are presented in random order.

True: distractors will be shown to the user in a random order every time the question is displayed.

False: distractors will always appear in the order in which they are set up within question.

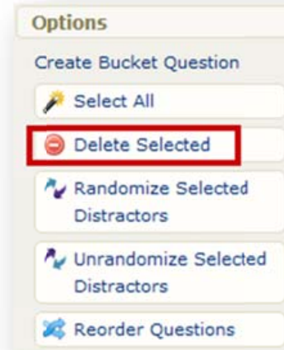
20.6.1 Delete Questions

Click on the name of the questionnaire section that you want to edit questions for. This will open the manage questions window. Select the questions you wish to delete using the checkboxes and then click “delete selected” from the options menu. If you would like to delete all of the questions, use the select all Select All tool.



	#	Type		Text	Random Distractors
☑	1	Bucketed	[Edit]	The course content corresponded well to the course's stated learning goals.	False
☑	2	Bucketed	[Edit]	The course materials helped me achieve the course's learning goals.	False
☐	3	Bucketed	[Edit]	The way the course was organized facilitated my achieving its learning goals.	False
☐	4	Bucketed	[Edit]	The course content was applicable to my own goals for taking the course.	False
☐	5	Bucketed	[Edit]	The course was intellectually challenging.	False
☐	6	Bucketed	[Edit]	I recommend that this course continue to be offered in the future.	False

Back To Sections



20.6.2 Edit Questions

Click on the name of the questionnaire section that you want to edit questions for. This will open the manage questions window. Click the "edit" link next to the question you want to edit. This will open the edit page for the question.

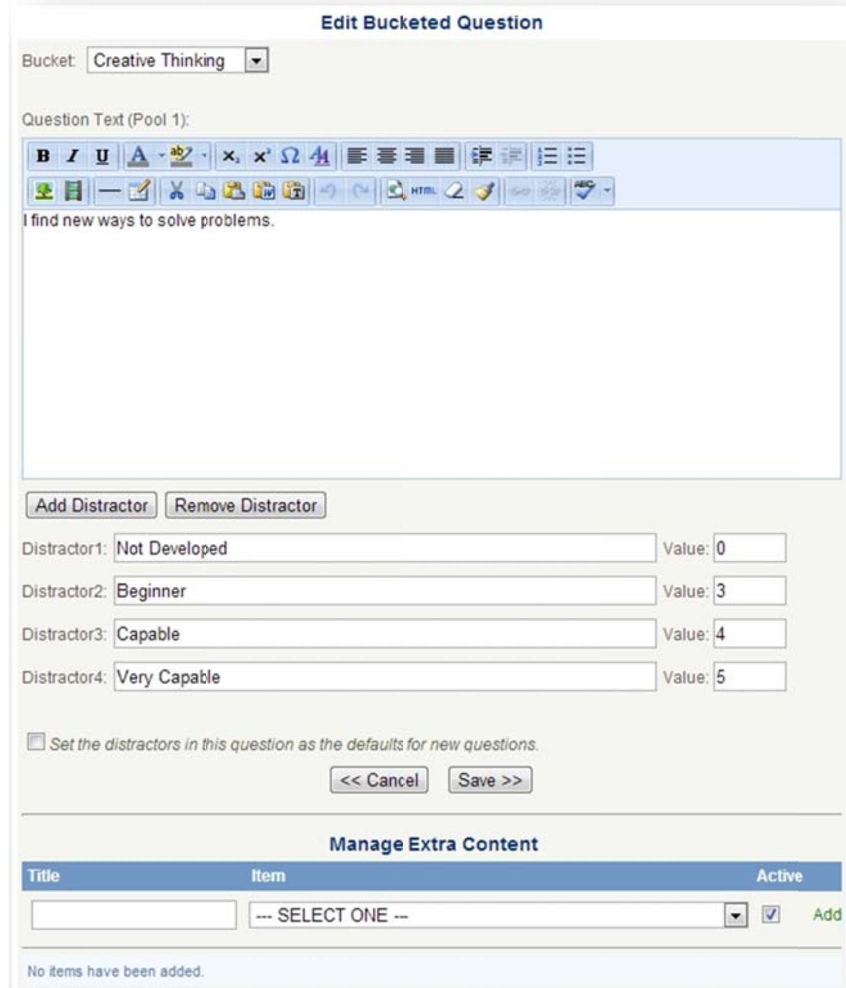
Save: This button will save your changes and return you to the manage questions page.

Cancel: This button will return you to manage questions page without saving your changes.

Manage Extra Content will create a link to another relevant file within the product. Participants will see the link at the bottom of the question when they take the questionnaire.

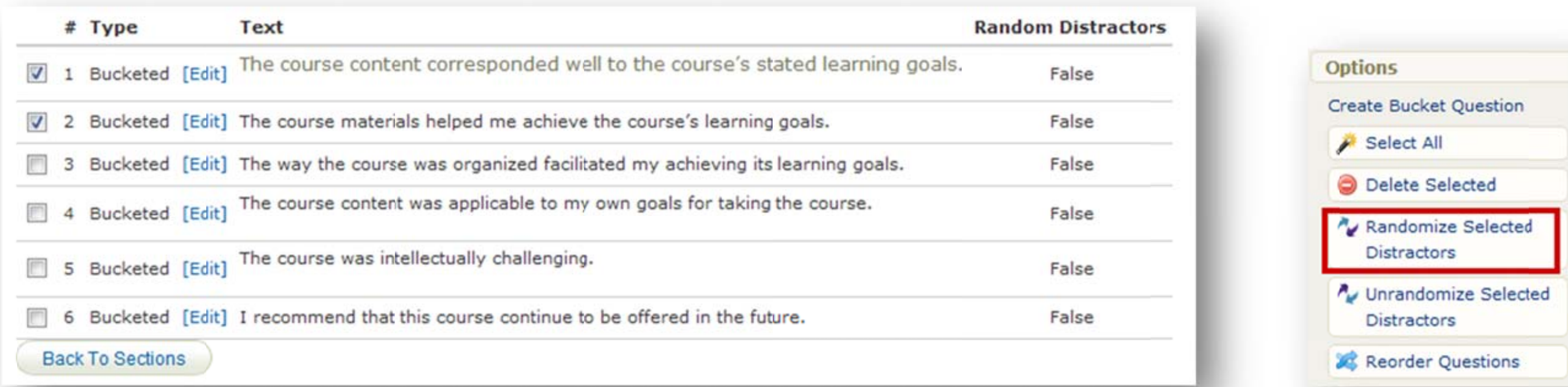
- Title – type in a name for your extra content
- Item - select from a file from the drop down menu. The drop down menu contains files that are uploaded to the product's local media library.
- Active – use the checkbox to toggle this option. Participants will only see active content.
- Add – click add to create the content link.
- DEL – click DEL to remove the content link.

You do not have to click save when updating the manage extra content area.



20.6.3 Randomize Question Distractors

To randomize the order of the available answers (distractors) within the questions, select the questions you wish to randomize the distractors for by using the checkboxes and then clicking the "randomize selected" button from the right hand side. If you would like to randomize all of the questions, use the select all Select All tool. This will present the distractors in the question in a random order to the participants. If the random distractors column says true, then the distractors in this question are randomized. If the column says false, then they are not presented in random order.

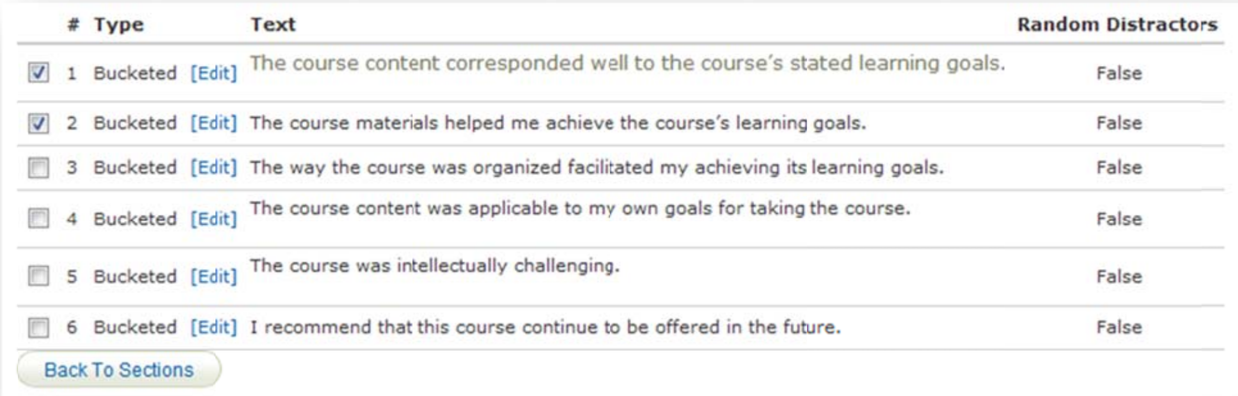


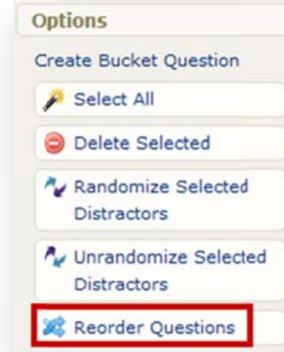
Unrandomize Question Distractors

Select the questions you wish to unrandomize the distractors for using the checkboxes and then click the "unrandomize selected" button from the options menu. If you would like to unrandomize all of the questions, use the select all Select All tool. This will present the distractors in the question in the default order in which you entered them.

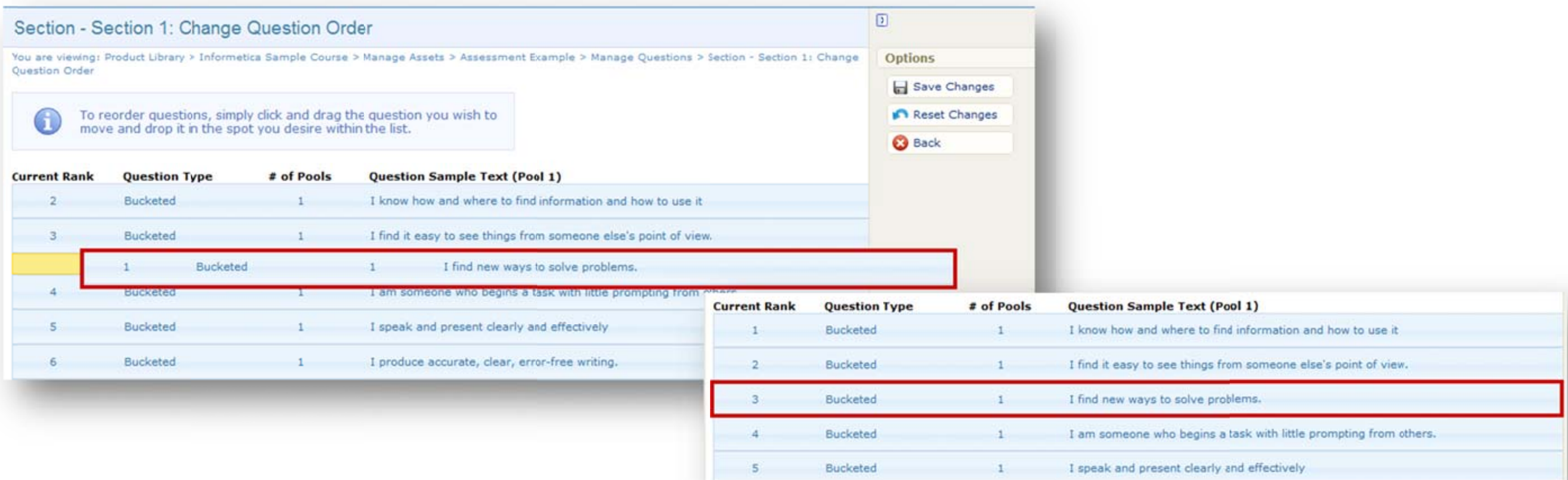
20.6.4 Reorder Questions

Click on the name of the questionnaire section that you want to reorder questions in to open the manage questions page. Click the reorder questions button from the right hand side.





This will open a change question order page where you can click and drag the question you wish to move and drop it into a new spot within the list.



You can reset your changes before you save or press the back button to return to the manage questions page without making the changes. Once you click save, you will see from the manage questions page that the question is now moved to the new order.

20.7 Review Questionnaire Results

Run report R203 Group Questionnaire Scores to:

- View the results for each questionnaire bucket for entire user groups, including the section and number of attempts
- See which of users have been completed the questionnaire and how many times
- View the date of the last attempt
- View user levels of competency within a given bucket (skill set)

21. Appraisals

You can automate the learner or employee evaluation process for any kind of performance measure such as Key Performance Indicators (KPIs) and competencies. For example, managers can use appraisals to determine overall performance for groups and individuals.

Appraisals use bucketed multiple choice questions. Every question is assigned one bucket, and every answer to a question can be assigned a certain number of points that go into its bucket. When a manager, publisher, or instructor appraises a participant, they are essentially assigning them a certain worth within each bucket so that at the end of the appraisal each participant has been categorized based on the answers given for each question.

Topics Covered In This Chapter

An example of an employee appraisal set up in Informetica.

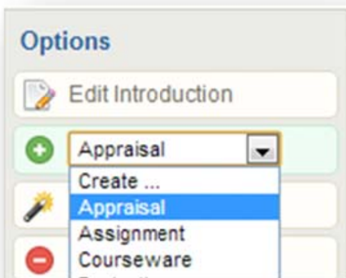
1 to 8 of 8	Answers
1 Monitors quality of incoming raw materials.	A - Always B - Most Often C - Periodically D - Rarely E - Never
2 Completes process sheets accurately, inserting all instructions according to Standard Operation Procedure #539-302	A - Always B - Most Often C - Periodically D - Rarely E - Never
3 Finished product is inspected prior to shipping	A - Exceeds expectations B - Somewhat Exceeds Expectations C - Meets expectations D - Less than expectations E - Inadequately short of expectations
4 Always meets the 5,000 per day thresholds	A - Exceeds expectations B - Somewhat Exceeds Expectations C - Meets expectations D - Less than expectations E - Inadequately short of expectations

21.1 Create or Edit an Appraisal

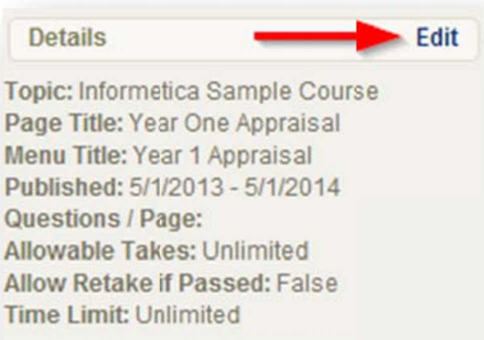
To fully create an appraisal you must complete the following steps:

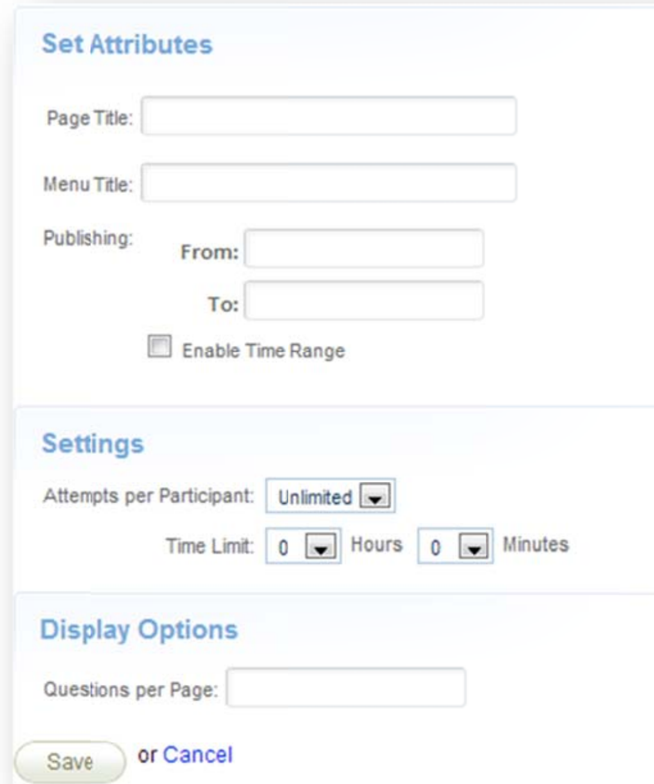
✓Create an appraisal ✓Create buckets ✓Create sections ✓Create questions for each section and assign to buckets

1. Navigate to the manage assets page for the product
2. Select **Appraisal** from the **Create** dropdown menu (located in the Options menu)
3. Complete the form and **Save**



4. Click **Edit** from the appraisal's details menu to make changes





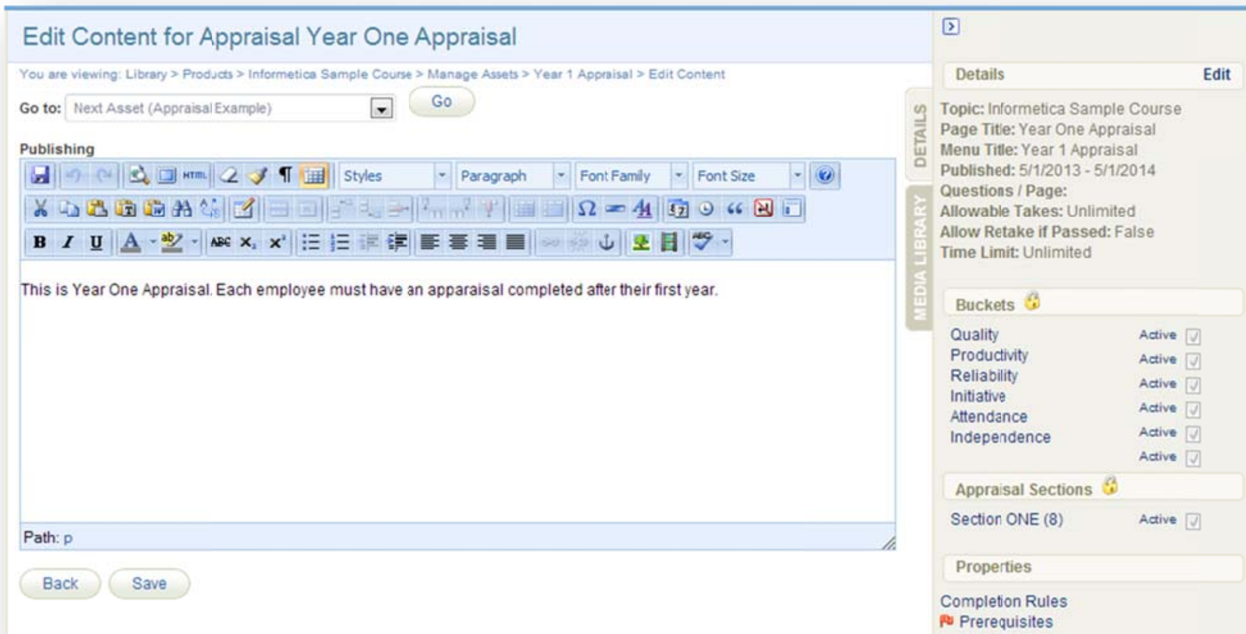
A brief description of the fields seen during creation

Field	Description	Input
Page Title	Enter the name of the appraisal. The page title will show up on the top of online content pages.	Required
Menu Title	The menu title is what shows in the assets list and in side menus. Note that menus have a limited amount of display; the longer your menu titles, the more cramped menu displays will be.	Required
Publishing	Select the dates that your appraisal is valid. It can only be accessed during the published dates. If the appraisal falls before or after the published dates, registered participants would no longer see the appraisal.	Required
Enable Time Range	Select this box to enter specific times within the publish dates that your appraisal is valid.	Optional
Attempts per Participant	Select the number of times a participant is allowed to take this appraisal (1-5 attempts or unlimited).	Optional
Time Limit	You can optionally restrict the length of time allowed to complete the appraisal by selecting from the dropdown menus. The amount of remaining time will appear to the participant at the top of every question page.	Optional
Questions per Page	Enter the number of questions you want displayed on each page of the appraisal. If no number is entered, then questions will all appear on one page.	Optional
Save	Save your changes and creates the appraisal. After saving, you are brought to the manage assets page.	Required
Cancel	Return you to the manage assets page without creating the new appraisal.	Optional

21.2 Create or Edit Custom Introductions

An appraisal has a default introduction page that shows the participant the name of the appraisal and a start button. You can optionally append this information with your own custom introduction.

1. Navigate to the manage assets page for the product
2. Open the appraisal
3. Customize your introduction using the content editor
4. Click **Save**
5. To edit an existing introduction, open the appraisal and make your changes in the content editor.



21.3 Create Buckets

You need to create at least one bucket for the appraisal. An appraisal is created using bucketed questions. This bucketed style allows you to apply categories to each question that are not immediately known to the person giving the appraisal. If desired, you can also assign points to the predetermined responses (distractors) and then see the total score a user has received for any specific bucket.

1. Navigate to the manage assets page for the product
2. Open the appraisal
3. Click **Create** on the side bar next to Buckets

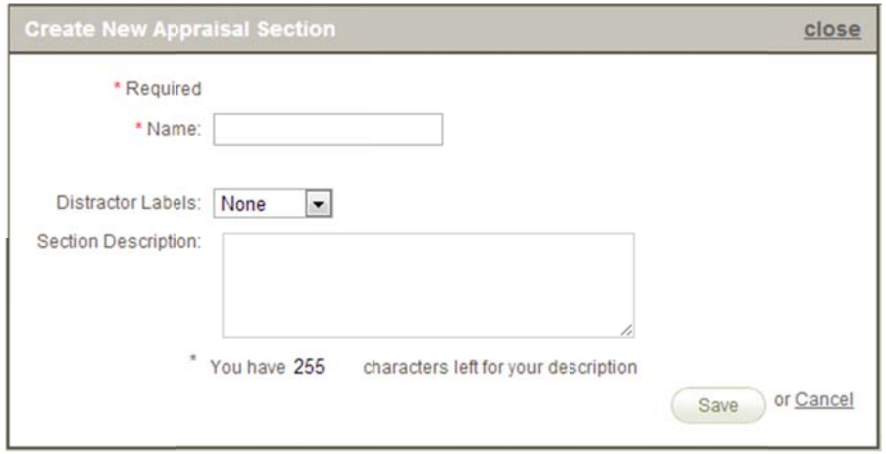
4. Enter a bucket name (e.g. Productivity)
5. Click **Save**
6. Select **Active** next to each bucket

Buckets cannot be edited, but you can create a new bucket, and then deactivate or delete an old one.

21.4 Create and Edit Sections

After creating a bucket, you need to create at least one section to house your questions.

1. Navigate to the manage assets page for the product
2. Open the appraisal
3. Click **Create** on the side bar next to Appraisal Sections. Field indicated with a red asterisk * are required to successfully create the section.
4. Select **Active** next to each section. Sections must be active before participants will be able to see them. Once an appraisal is made available to participants it is locked and then you cannot add or edit sections. However, you can edit the questions themselves.



5. To edit, click the section to open it. You can only edit sections that are not yet active.

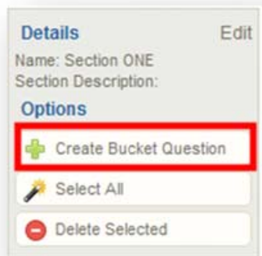
Below is a brief description of the fields:

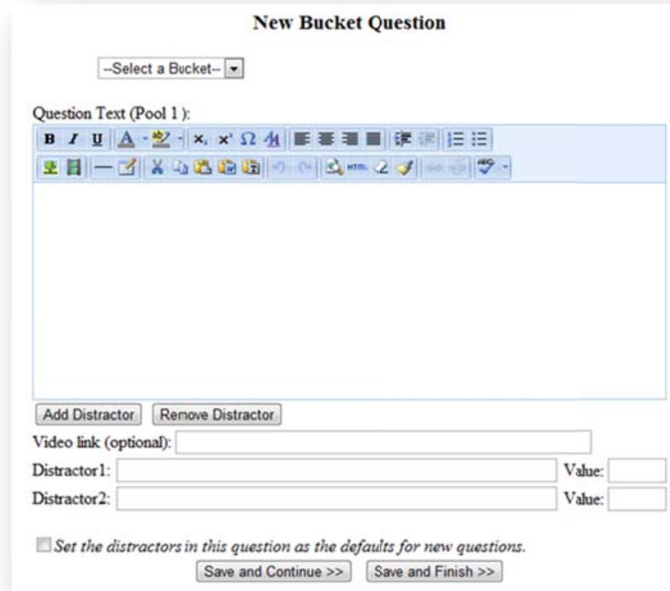
Field	Description	Input
Name	Enter a name for the section	Required
Distractor Label	Distractor labels precede the list of answers offered as choices for the participant so they can select an option. Use the drop down menu to select letters or numbers.	Optional
Section Description	Add an optional description for the section.	Optional
Save	This button will save your changes and create the new section. Once you have saved the section, you are brought to the publishing window for the appraisal.	Required
Cancel	This button will return you to the publishing window for the appraisal without creating a new section.	Optional

21.5 Create Questions

After you have created buckets, you can create questions.

1. Open the appraisal
2. Open a section to create questions
3. Click **Create Bucket Question** on the options menu
4. **Save**



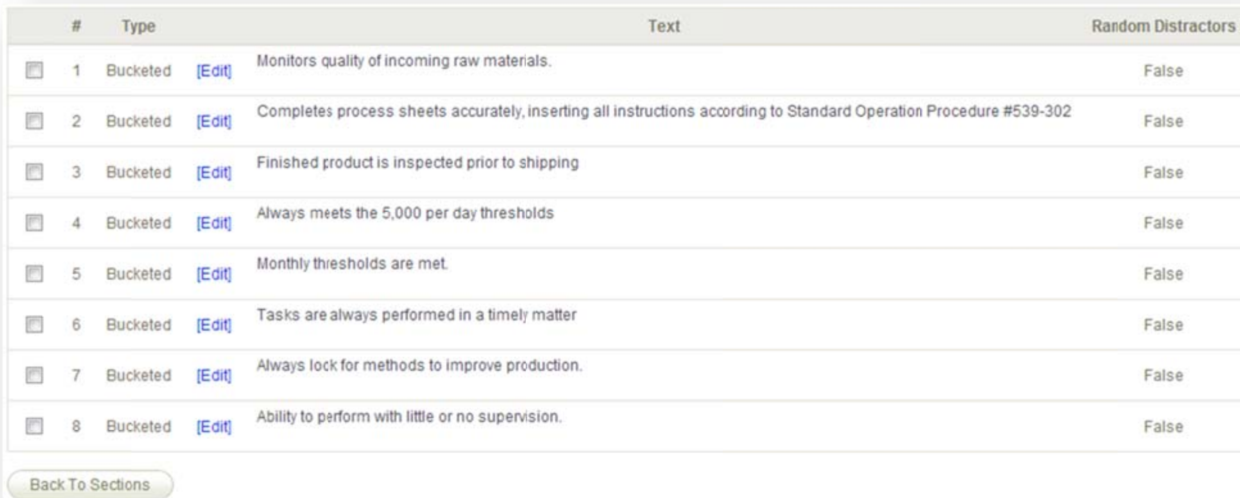


Below is a brief description of the fields:

Field	Description	Input
Select a Bucket	From the drop down menu, select one of the buckets that were created earlier.	Required
Question Text	Use the content editor to design the question with text and supporting files.	Required
Add Distractor	Use the add button to create more distractors for the question.	Optional
Remove Distractor	Position your cursor within the distractor text field and click the remove button.	Optional
Video Link	You can insert a link to an uploaded video in this field.	Optional
Distractor	Enter the text for the responses offered as choices for the participants in these fields.	Required
Value	Enter a number value for each distractor. Negative numbers are not recognized.	Required
Set the Distractors	Select this box if you would like the same distractors to appear on all of the questions.	Optional
Save and Continue	Save you r changes and continue creating more questions for this appraisal.	Required
Save and Finish	After saving, you will be returned to the section: manage questions screen.	Optional

21.6 Manage Questions

1. Open the appraisal
2. Open a section to view questions
3. Edit and delete questions from the **Manage Questions** page



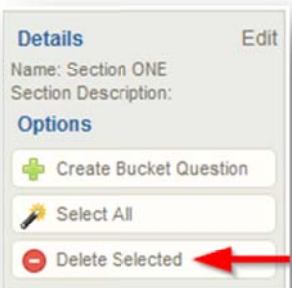
Below is a brief description of the fields:

Field	Description
#	Appraisal questions are assigned an automatic number as you create them. This is the default order in which they are presented during an appraisal
Type	For appraisals, questions are always bucketed.
Text	The text of the question itself as the participant sees it.
Randomize Distractors	Randomization is turned off for Appraisals.

Questions are displayed based on sections and the questions per page that you set up. There is no "By Section"/"By Question" option as in other Informetica testing assets. The number of questions per page will show first, until you get to the end of a section, followed by the next section.

21.6.1 Delete Questions

1. Open the appraisal
2. Open a section to manage questions
3. Select the questions you wish to delete using the checkboxes
4. Click **Delete Selected** from the options menu
5. Use **Select All** to delete all of the questions

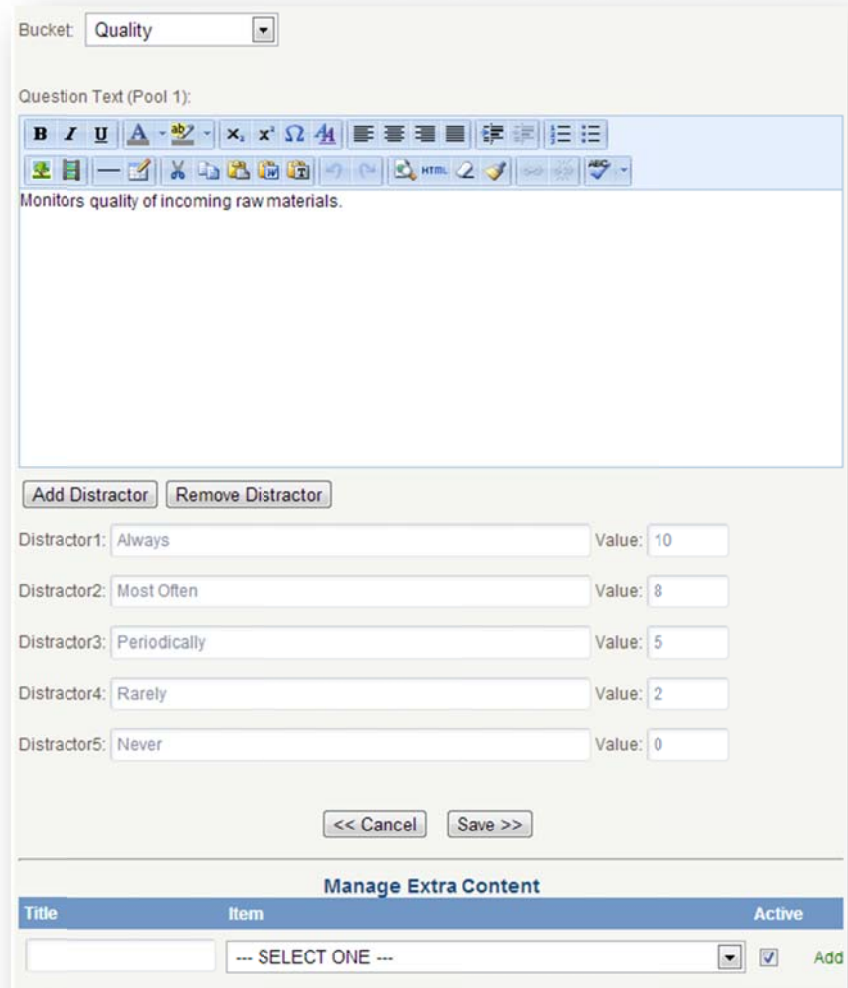


21.6.2 Edit Questions

1. Open the appraisal
2. Open a section containing the question you wish to edit
3. Click **Edit** next to the question you want to edit
4. **Save**

Below is a brief description of the fields:

Field	Description
Bucket	Select the bucket you want the question to belong to.
Question Text	Use the content editor to edit the question text.
Save	This button will save your changes and return you to the manage questions page.
Cancel	This button will return you to manage questions page without saving your changes.
Manage Extra Content	Create a link to another relevant file within the product. Participants will see the link at the bottom of the question when they take the appraisal. You do not have to click save when updating here. • Title – type in a name for your extra content • Item - select from a file from the drop down menu. The drop down menu contains files that are uploaded to the product's local media library. • Active – use the checkbox to toggle this option. Participants will only see active content. • Add – click add to create the content link. • DEL – click DEL to remove the content link.

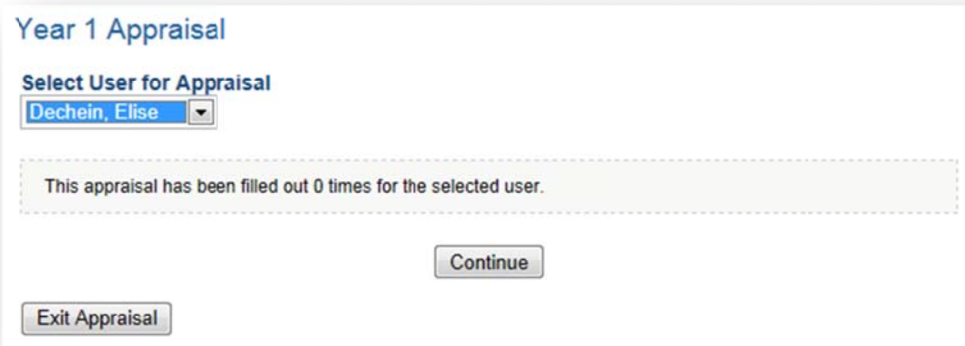


21.7 Completing an Appraisal

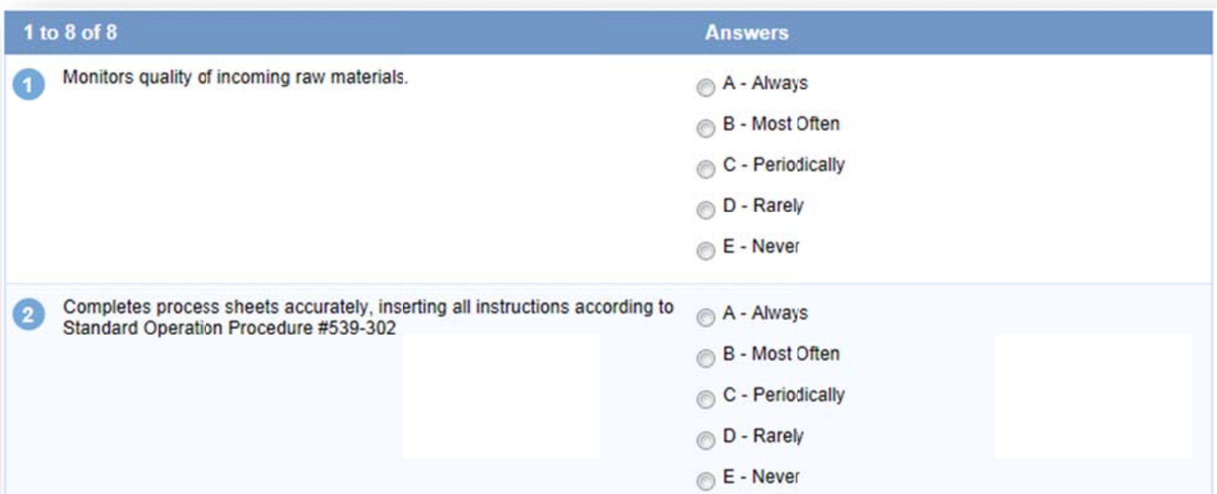
This option is available to campus admins, campus managers, user group managers, publishers, and instructors

Appraisals are not accessible by participants. You may choose to display the appraisal, but it cannot be launched by a participant.

1. Launch the appraisal by clicking it from the list of the product's assets
2. **Select User for Appraisal**: select the user you wish to appraise from the drop down menu
3. Click **Continue**



4. Review the appraisal summary, which shows information such as the number of questions
5. Click **Start** to being the appraisal
6. Fill out the appraisal and then click **Next**



21.8 Review Appraisal Results

Run report R203 Group Questionnaire Scores to:

- View the results for each appraisal bucket for entire user groups, including the section and number of appraisals conducted.
- See which of users have been appraised and how many times
- View the date of the last appraisal
- View user levels of competency within a given bucket (skill set)

22. Markup Documents and Wikis

Markup documents and wikis are two assets that participants can directly interact with.

Topics Covered In This Chapter

22.1 Markup Documents

A markup document asset is an interactive review tool that allows participants and instructors to securely share, make notes upon and comment on a document without changing the actual document in the product. The original document retains its integrity while all user's notes, comments and appended comments are shared with their name, date and time of their activity.

To fully create a markup document you will need to complete the following steps:

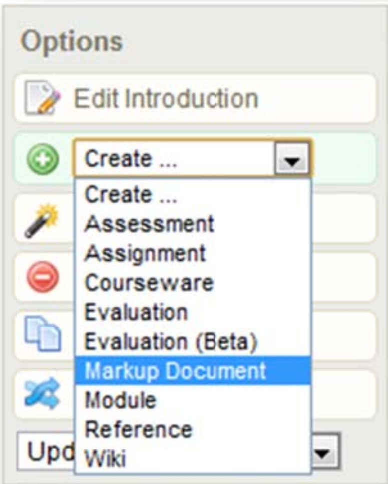
Step 1
- Create a markup document asset

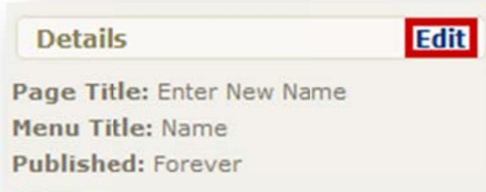
Step 2
- Create or copy/paste a document into the publishing window

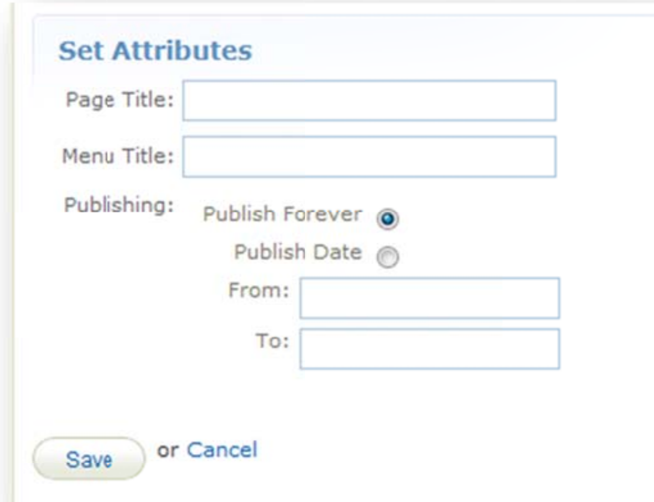
Step 3
- Set up the markup document's attributes and settings

22.1.1 Create/Edit a Markup Document

From the manage assets page, click on Create under the options menu and then select markup document from the drop down menu. To edit these details, click on edit next to the details column on the right. Enter the details and then save.







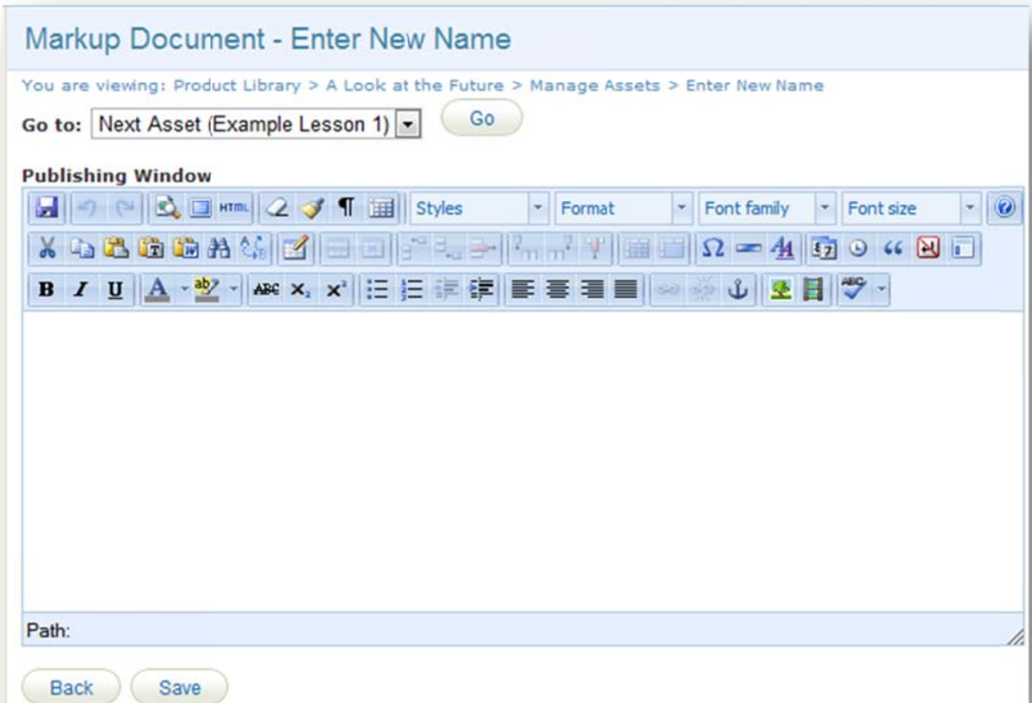
Below is a brief description of the fields:

Field	Description	Input
Page Title	Enter the name of the markup document. The page title will show up on the top of online content pages.	Required
Menu Title	The menu title is what shows in the assets list and in side menus. Note that menus have a limited amount of display; the longer your menu titles, the more cramped menu displays will be.	Required
Publish Date	Select publish forever if you want the markup document to be always available or select a specific publish date if your markup document will be unavailable during or before a certain date. A markup document that is published forever is available to all participants with access. A markup document that is published for specific dates is also available to all participants with access, but only during the published dates. If the markup document falls before or after the published dates, registered participants would no longer see it.	Optional

After saving, you will be brought to the manage assets page.

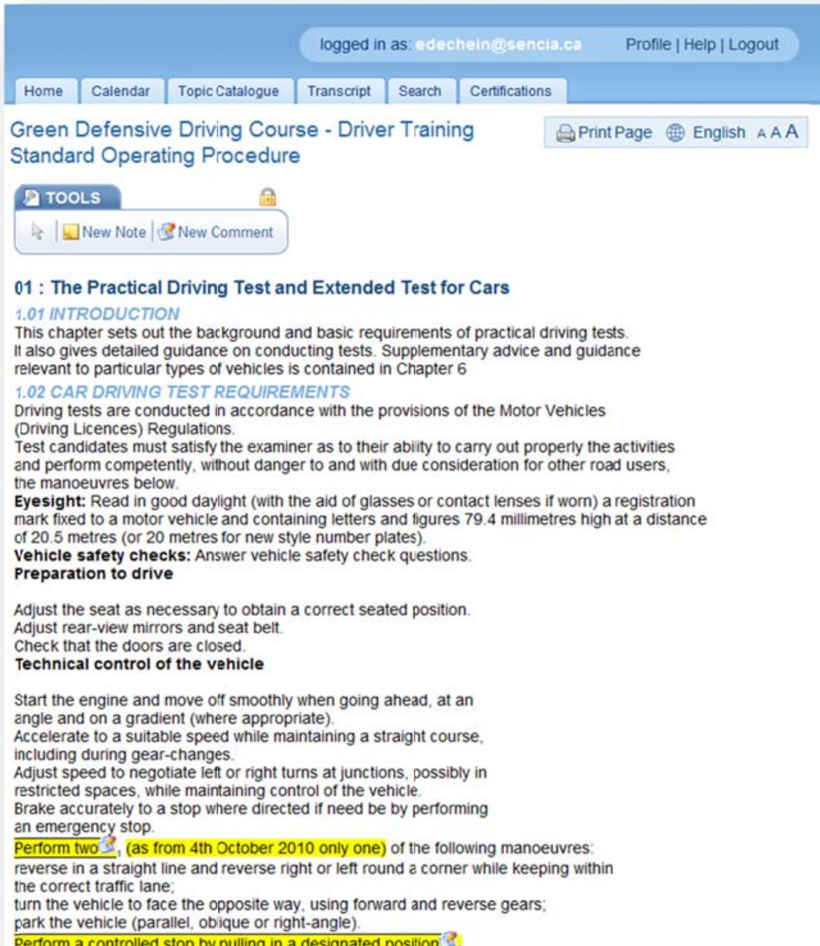
22.1.2 Add or Edit Content

From the manage assets page, open the markup document that you wish to add or edit content for and design the content in the publishing window. Click the Save button to keep the changes or click the back button to return to the manage assets page without keeping the changes.



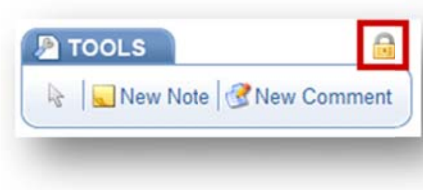
22.1.3 Markup Document Desktop View

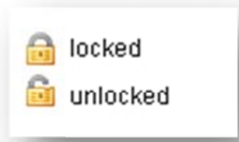
The process of using a markup document from the desktop of things as a user or participant is illustrated here to give a full overview of the markup document.



22.1.4 The Markup Tool

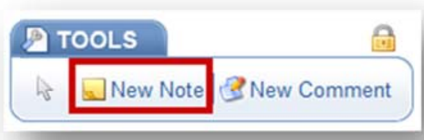
The markup document has a toolbar that allows users to add notes and comments to the document. You can move the toolbar around the content area so that it is not obstructing your view of the document. To do this, click on the lock icon to unlock it. When the toolbar is unlocked, you can click anywhere on it and drag to a new position on the screen.

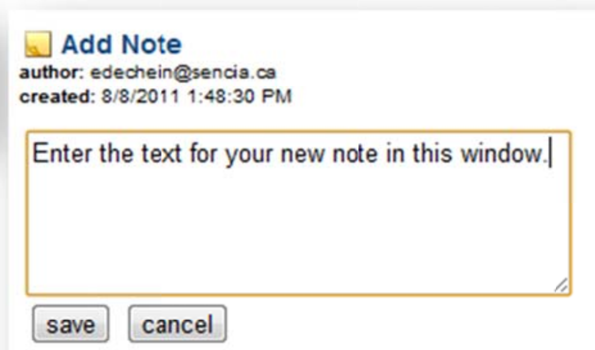


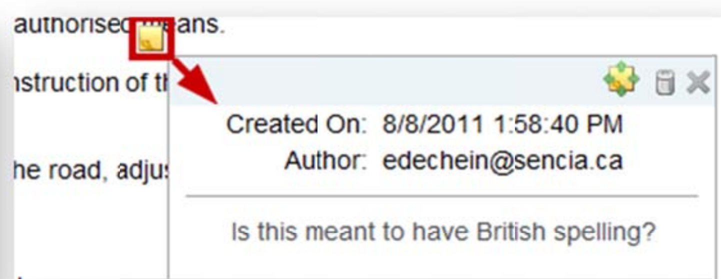


22.1.5 User Notes

Users can create a new note on the markup document by clicking the new note link on the markup tool bar. Move the cursor to the precise area of the content where you would like to display your note. Click on the screen to set position. Enter the text for your note in the add note window. Once you click the save button, your note will be added to the document and represented with a yellow note icon . Hover over the icon to view the note, creation date and author.

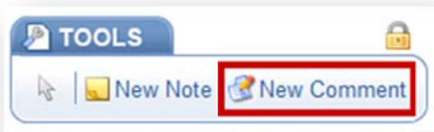


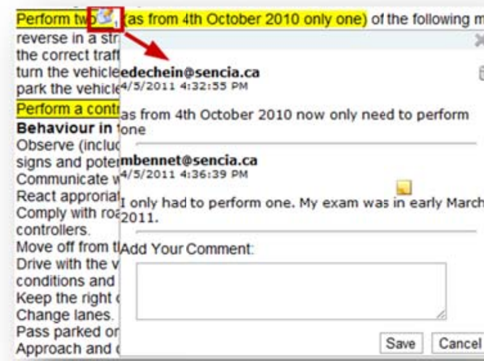




22.1.6 User Comments

Users can create a new comment on the markup document by clicking the new comment link on the markup tool bar. Move the cursor to the precise area of the content where you would like to display the comment. Click on the screen to set position. Enter the text for your comment in the add comment window. Once you click the save button, your comment will be added to the document and represented with a comment icon. Hover over the icon to view the comment, any replies to it, creation date and author.





Markup Document Legend

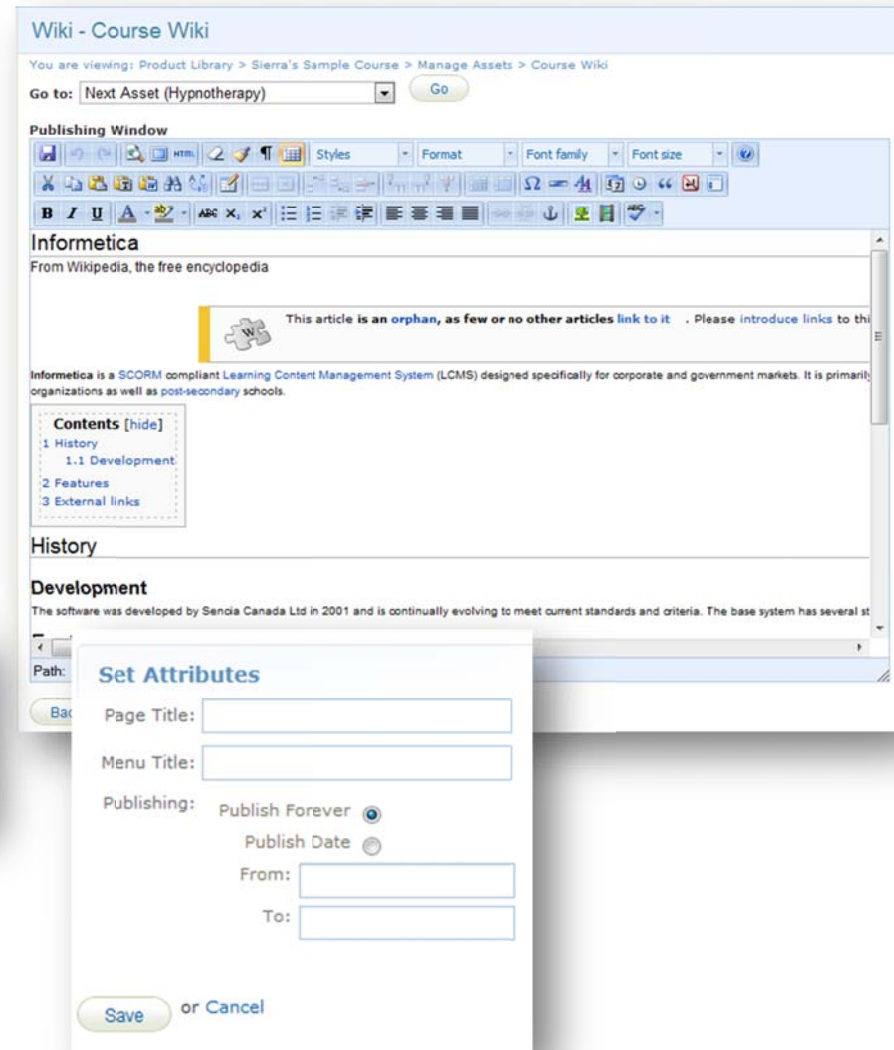
- Reposition note
- Delete note
- Close note

22.2 Wikis

A wiki is a collaborative resource that allows users to directly add and edit content collectively. This is one of the few assets that participants can interact with. The wiki stores past versions and revisions to be viewed when needed. User tracking information is also available.

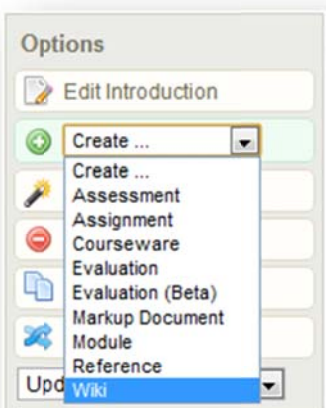
To fully create a wiki you will need to complete the following steps:

- ✓Create a Wiki
- ✓Set up the Wiki Attributes and Settings



22.2.1 Create a Wiki or Edit Details

From the manage assets page, click on create under the options menu on the right and select **Wiki** from the drop down menu. To edit these details, click on edit next to the details column on the right. Enter the details and then save.



Below is a brief description of the fields:

Field	Description	Input
Page Title	Enter the name of the wiki. The page title will show up on the top of online content pages.	Required
Menu Title	The menu title is what shows in the assets list and in side menus. Note that menus have a limited amount of display; the longer your menu titles, the more cramped menu displays will be.	Required
Publish Date	Select publish forever if you want the wiki to be always available or select a specific publish date if your wiki will be unavailable during or before a certain date. A wiki that is published forever is available to all participants with access. A wiki that is published for specific dates is also available to all participants with access, but only during the published dates. If the Wiki falls before or after the published dates, registered participants would no longer see it.	Optional

After saving, you will be brought to the manage assets page.

22.2.2 Add or Edit Content

From the manage assets page, open the wiki you wish to add or edit content for and design the content in the publishing window. Click the save button to keep the changes or click the back button to return to the manage assets page without keeping the changes.

22.2.3 Revert a Wiki Page to a Previous Version

To revert to an old version of a wiki page, click the history link in the top right while in view page.

This will show you a list of revision dates. Open the older version you want by clicking it. Copy the content and then paste it into the wiki publishing window and save.

23. Publishing Tools Guide

23.1 Top Row Tools

Icon	Function	Description
	Save	The Save button will save content and formatting changes you have made.
	Undo	Undoes the last action.
	Redo	Reverses an undo action.
	Preview	Will open a small popup which displays your content as it appears to others.
	Toggle Full Screen Mode	Allows you to toggle between the regular size Publishing Window and a full screen Publishing Window.
HTML	Edit HTML Source	View and work in the underlying HTML source code rather than the WYSIWYG view.
	Remove Formatting	Remove any formatting that has been applied to your selected text (i.e. Bold, italic, etc.)
	Cleanup Messy Code	The Cleanup Messy Code button will allow you to clean up HTML font tags, style sheets and other unwanted code after copying and pasting content directly from MS Word or similar programs.
¶	Show/Hide Visual Control Characters	This control is not currently enabled for Informetica.
	Show/Hide Guidelines / Invisible Elements	Click to show or hide table borders.
Styles	Styles	Applies various styles to the selected text (boxes, positioning, and text styling).
Format	Format	Converts selected text into predefined formats that are HTML friendly - e.g. paragraphs <p>, headings <h1>, addresses(<address>, or preformatted (<pre>).
Font Family	Font Family	Converts the selected text into the selected font (Arial, Comic Sans, Times New Roman, etc.).
Font Size	Font Size	Converts the selected text into the desired font size (8pt - 36pt).
	Help	Tells you more about the TinyMCE editor.

23.2 Center Row Tools

Icon	Function	Description
	Cut	Cut (remove) selected text from the content area and add it to your clipboard.
	Copy	Copy selected text from the content area to your clipboard for use elsewhere.
	Paste	Paste copied or cut text into a selected content area.
	Paste as Plain Text	Paste plain text only (text without formatting, paragraphing, or styling). This is the preferred option for pasting and will negate the need for cleaning up HTML. However you may need to redo the paragraphing.
	Paste from Word	Paste copied or cut text from a Microsoft Word document into a selected content area.
	Find	Find desired text within the content.
	Find/Replace	Find and replace text within the content.
	Insert Table	Insert a table. Number of columns or rows, and table width, height, borders, & alignment can also be set.
	Table Row Properties	Edit table row alignment, height, class, and styles.
	Table Cell Properties	Edit table cell alignment, height, class, and styles.
	Insert Row	Insert a table row before or after the selected row.
	Delete Row	Delete the selected table row.
	Insert Column	Insert a table column before or after the selected column
	Delete Column	Delete the selected table column.
	Split Merged Cells	Split a single table cell into multiple cells.
	Merge Cells	Select two or more table cells to merge into a single cell.
	Custom Characters	Insert symbols & special characters (e.g. trademarks, currency, etc.),
	Horizontal Rule	Insert a horizontal line.
	Edit CSS	A popup dialog box allows you to enter Cascading Style Sheet information for the selected text.
	Insert Date	Insert the current date into your content.
	Insert Time	Insert the current time into your content.
	Blockquote	Created the selected text as a blockquote. The selection will be indented on the left and right margins.
	Non-breaking space	Prevents an automatic line break or wrap at the selected content position.
	Template content	Insert predefined template content.

23.3 Center Row Tools

Icon	Function	Description
	Bold	**Bolds** the selected text.
	Italic	*Italicizes* the selected text.
	Underline	Underlines the selected text.
	Text Color	Change the colour of the text.
	Highlight	Change the background colour of the text.
	Strikethrough	Creates a ~~strikethrough~~ the selected text.
	Subscript	Changes the selected text to $_{\text{subscript}}$.
	Superscript	Changes the selected text to $^{\text{superscript}}$.
	Bulleted List	Inserts a bulleted list.
	Numbered List	Inserts a numbered list.
	Decrease Indent	Decrease the selected text's indentation.
	Increase Indent	Increase the selected text's indentation.
	Text Alignment	Alignment of highlighted text (left, centered, right, justified).
	Insert/Edit Link	Create (or edit) a hyperlink for selected text. This is also used to manage popup windows.
	Unlink	Remove a hyperlink from selected text.
	Insert/Edit Anchor	Add an anchor link to a page.
	Insert/Edit Image	Insert images into your content from the Media Library.
	Insert/Edit Embedded Media	Insert embedded media files (e.g. Flash, QuickTime, Windows Media, Real Media files, etc.).

24. My Experience

Participants can add their own training events that can then be approved by a manager. Participants can track their practical experience and personal development plans such as project management experience, flight logs, offline certifications, or other qualifying activities.

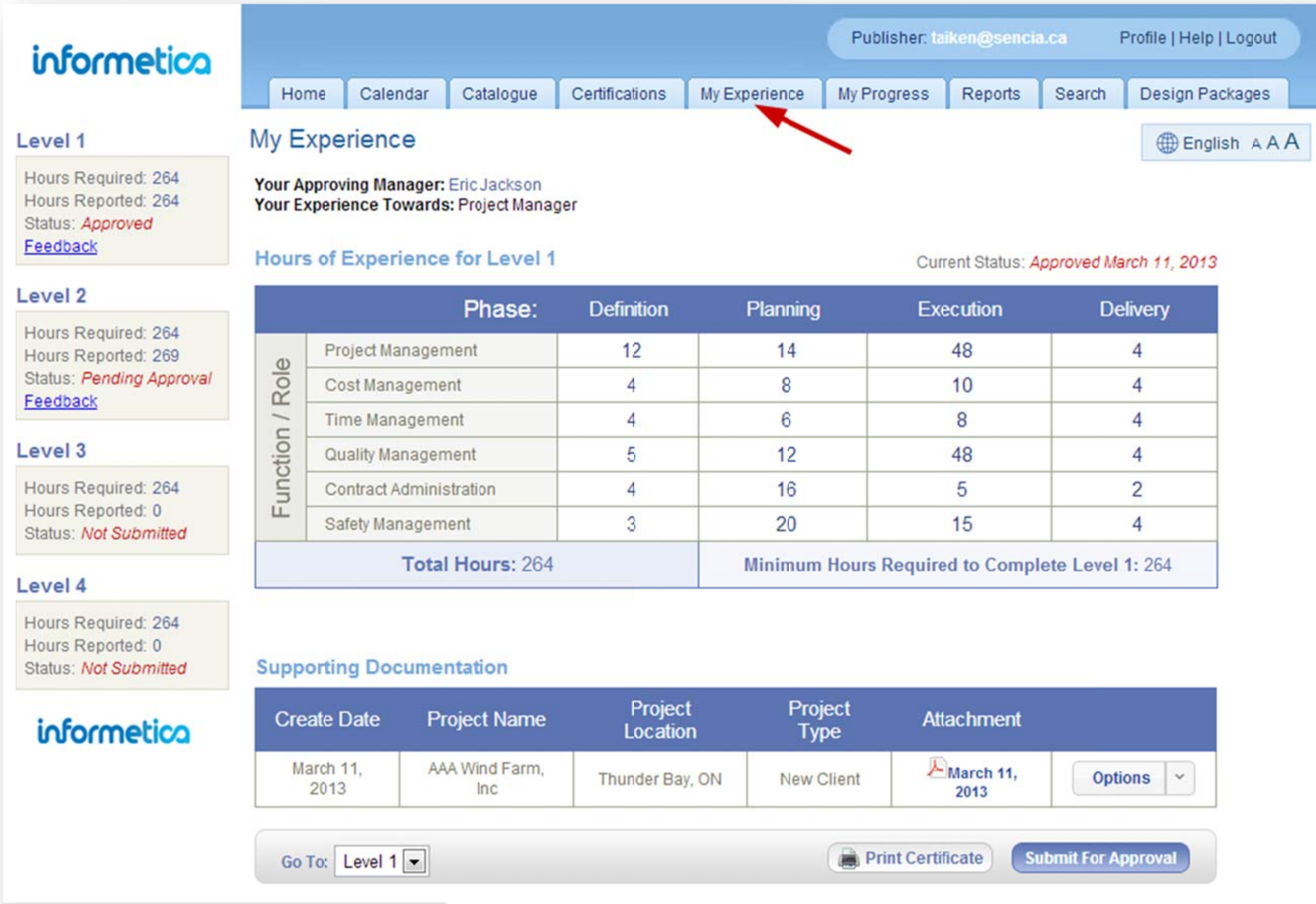
The experience log can be configured to track experience within a web form, by uploading supporting documents (i.e. PDF or word), or a combination of both. Authorized managers are provided with tools for reviewing and endorsing employee experiences as qualifying activities. Managers may also promote employees to up to four levels of pre-defined experience progression.

Topics Covered in this Chapter

24.1 Add Experience and Submit for Approval

1. Click the My Experience tab from your main navigation area to open the experience log.
2. Enter your hours for the current level. This can be done all at once, or a little at a time. You can also change the level at the bottom of the form.
3. Submit your hours for approval after you have met the requirements.
4. Your manager will review your submission and you may get an email to say if the level was approved or not approved.
5. Proceed to the next level, if applicable.

Configuration of the experience log is customized for your specific requirements, so while it will not look like exactly like the examples in this chapter, the functionality is the same.

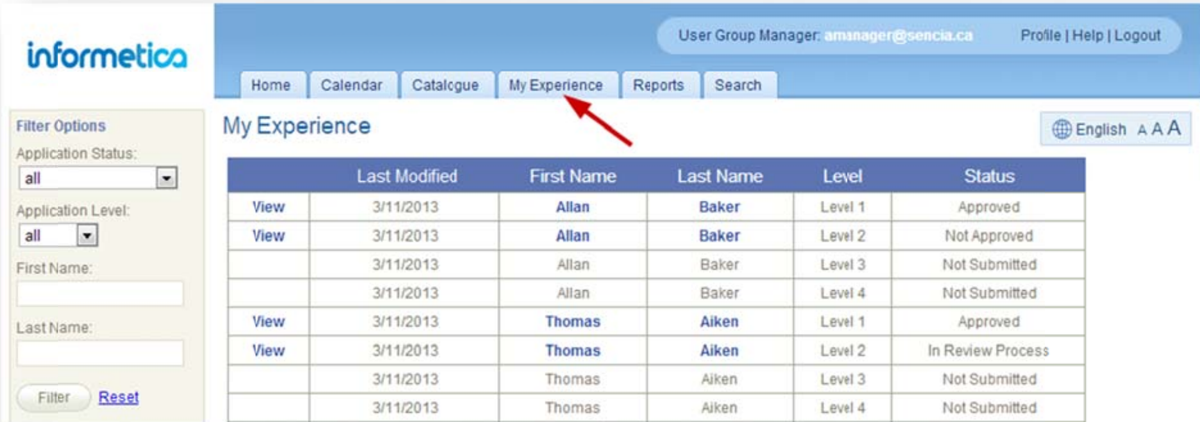

informetica
Publisher: taiken@sencia.ca
Profile | Help | Logout
Home
Calendar
Catalogue
Certifications
My Experience
My Progress
Reports
Search
Design Packages
English A A A
Level 1
Hours Required: 264
Hours Reported: 264
Status: Approved
Feedback
Level 2
Hours Required: 264
Hours Reported: 269
Status: Pending Approval
Feedback
Level 3
Hours Required: 264
Hours Reported: 0
Status: Not Submitted
Level 4
Hours Required: 264
Hours Reported: 0
Status: Not Submitted
informetica
My Experience
Your Approving Manager: Eric Jackson
Your Experience Towards: Project Manager
Hours of Experience for Level 1
Current Status: Approved March 11, 2013
Phase: Definition Planning Execution Delivery
Function / Role
Project Management 12 14 48 4
Cost Management 4 8 10 4
Time Management 4 6 8 4
Quality Management 5 12 48 4
Contract Administration 4 16 5 2
Safety Management 3 20 15 4
Total Hours: 264
Minimum Hours Required to Complete Level 1: 264
Supporting Documentation
Create Date Project Name Project Location Project Type Attachment
March 11, 2013 AAA Wind Farm, Inc Thunder Bay, ON New Client March 11, 2013 Options
Go To: Level 1
Print Certificate
Submit For Approval

Brief description of the form areas

Item	Description
Levels	You can have up to five levels of experience tracking and approval. Change the level that you are viewing at the bottom of the form.
• Hours	Hours required and hours currently reported per level.
• Status	The current status of each level of experience. 1. Not Submitted (default status) 2. Pending Approval (waiting for manager review) 3. In Review Process (manager has started reviewing) 4. Approved (status applied by manager) 5. Not Approved (status applied by manager
• Feedback	View your manager's message after you have submitted hours.
Approving Manager	Name of the manager responsible for approving your experience.
Your Experience Towards	The type of experience you are logging (i.e. project management, flight logs).
Hours of Experience	Enter the hours you have applied towards the project.
• Current Status	Shows the status for this level and the date the status was applied, if applicable.
• Function/Role	Specific to the type of project you are working toward.
• Phase	Specific to the function and roles of the project you are working toward.
• Total Hours	The current hours you have entered towards this level.
• Minimum Hours	The minimum hours required to complete this level.
Supporting Documentation	Add details regarding to the hours you entered and upload supporting documents, if applicable.
• Create Date	The date the supporting document was entered.
• Project Name	The name of the project you are working on.
• Project Location	The location of the project (e.g. city, corporate facility).
• Project Type	The type of project you are working on (e.g. new client, service request).
• Attachment	Upload and view supporting documents (e.g. client contact list, signed service requests).
• Options	Click options to view, edit or delete your supporting documentation.

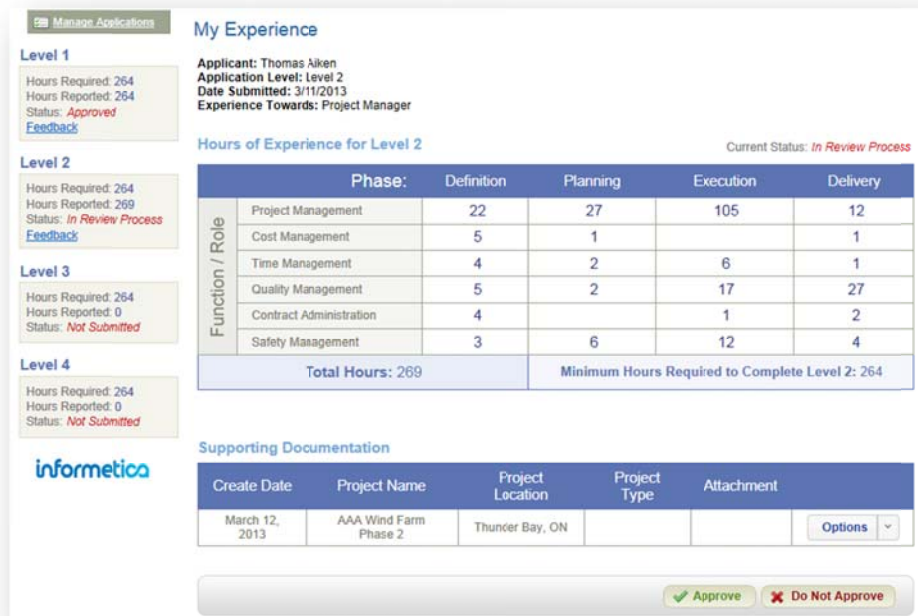
24.2 Approve Experience

A user who is assigned as the authorized approving manager may approve or not approve experience logs that have been submitted.



Generally, anyone who is assigned as the approving manager can do so, regardless of user type.

1. Click the My Experience tab from your main navigation area to open the experience logs for the users that you are managing.
2. Click "View" to open the selected user's submitted experience: Click "Options" to view any supporting documentation.
3. Review the submission and click "Approve" or "Do Not Approve", leave optional feedback for the user, and then click "Confirm".
4. Emails can automatically be sent to the user to let them know if the level was approved or not approved.



Brief description of the approval page

Item	Description
View	Click view to see the submission for a user's experience. View is available for any experience that has been submitted (approved, not approved and pending statuses).
Last Modified	The date that the experience was last modified. For example, for submissions that were not approved, updated, and then submitted again, the date will update each time changes are made to the log.
First Name	The user's first name. Click the name to see the user's experience submission.
Last Name	The user's last name. Click the name to see the user's experience submission.
Level	Indicates which level of experience the user has submitted.
Status	1. Not Submitted (default status) 2. Pending Approval (waiting for manager review) 3. In Review Process (manager has started reviewing) 4. Approved (status applied by manager) 5. Not Approved (status applied by manager

24.2.1 Experience Filter

Use the filter options to narrow your list to specific user experience. By default, users are sorted alphabetically by Last Name. You can filter by the status of the submission, the level of the experience, or by first or last name.