learning your way

informetica

Site Manager

Revision 15-1

Table of Contents

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 that 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

In no event shall Sencia Canada Ltd. or any of the authors or contributors to this manual be liable for any special, incidental, indirect or consequential damages of any kind, or any damages whatsoever resulting from loss of use, data or profits, and on any theory of liability, arising out of or in connection with the use or performance of Informetica.

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.

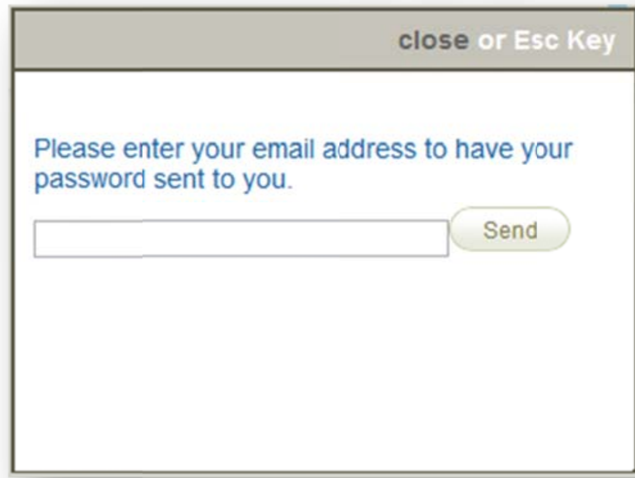
1.3 Supported File Formats

Informetica supports all standard web based media formats, as well Microsoft office suite file formats and Adobe PDF. Other supported formats include SCORM, AICC, 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

When visiting Informetica, 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.

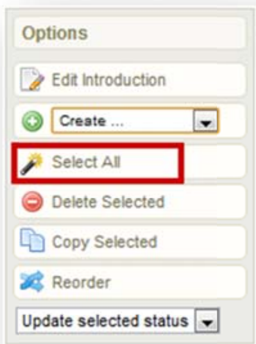
Selected – The tab on this organization is light blue with a checkmark. To deselect this organization click anywhere on the box. The tab will change to a light gold color to show that it isn't selected.

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.

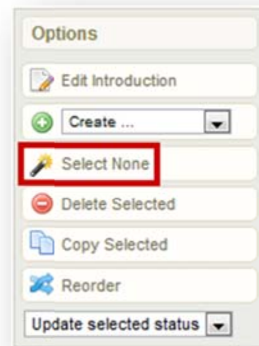
Select All Items

Click on Select All from the Options menu. When all items are selected, the Select All option becomes Select None.



Deselect All Items

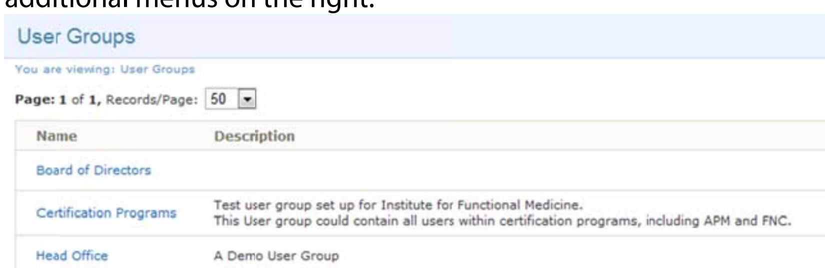
Click on Select All from the Options menu. When all items are selected, the Select All option becomes Select None.



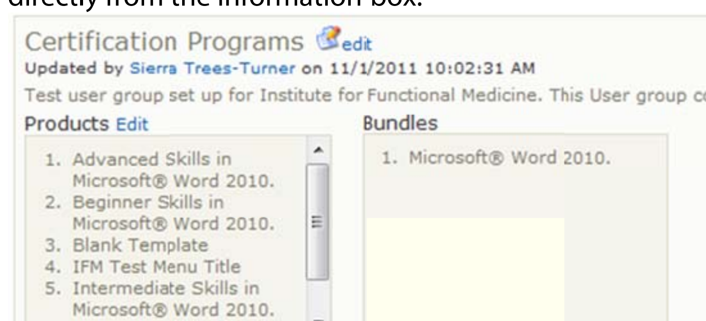
1.5 List and Detailed Views

There are two ways to view manage pages in Informetica (such as user groups and products): List View and 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.

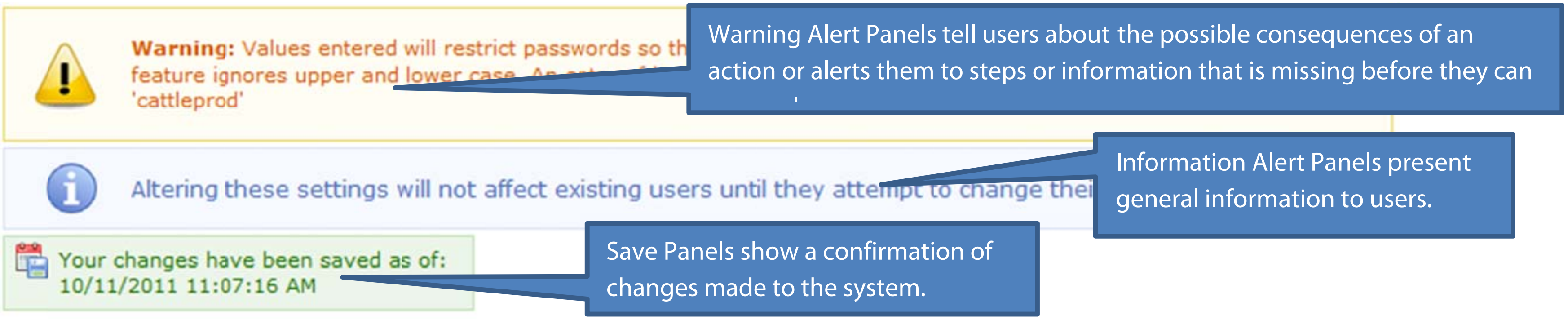


Detailed View displays more information about each item in the information box and generally gives the ability edit details or delete directly from the information box.



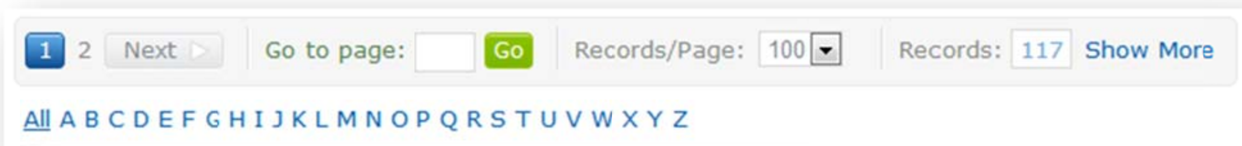
1.6 Alert Panels

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 a Campus or Organization?

A campus (also known as an organization) is a way of grouping user groups, products, access codes, and bundles together. Informetica must have at least one campus 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 campus to have a fair measure of its own administrative abilities. To create this environment, a site manager has created at least one campus that corresponds to a broad based area such as a department, district, or separate company.

1.9 What is a Product?

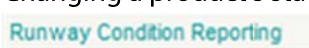
Products house a collection of documents, and related media used to teach participants on a specific subject matter. Informetica allows clients to have five different product types at a time, each with their own unique capabilities. Note that products may be customized for your system and named differently than the terms used in this manual.

You can have up to ten different product types. 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 desktop accounts are 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

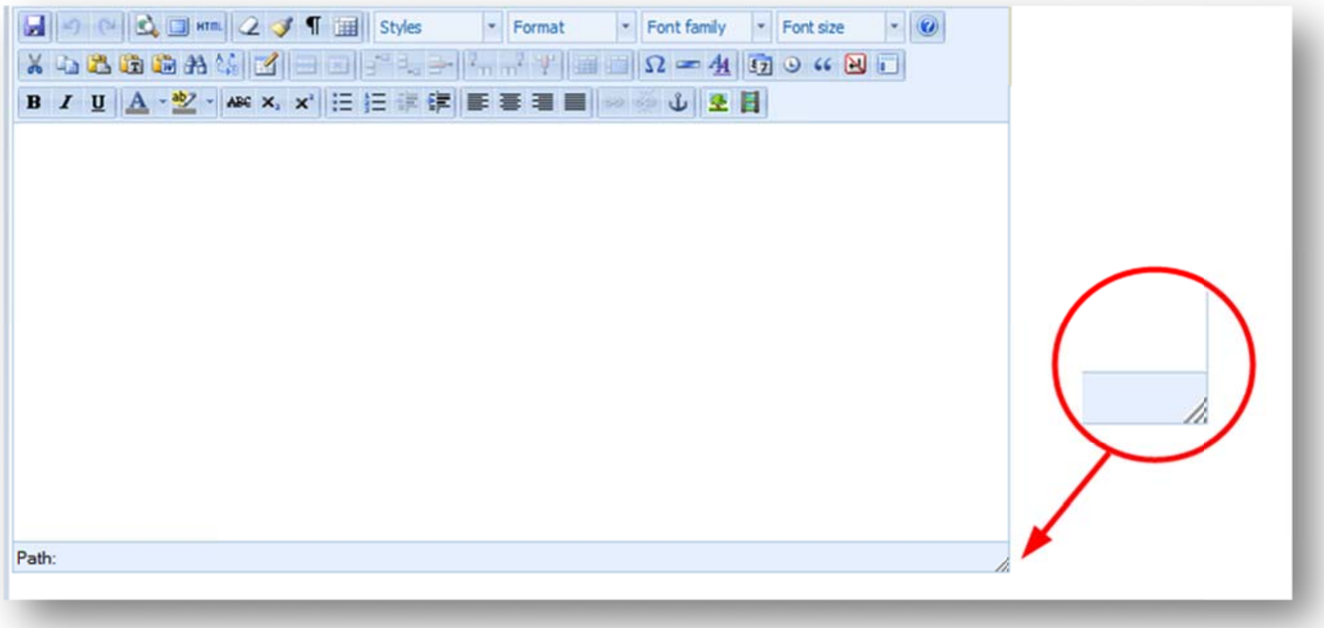
The Informetica system has a number of default user types to allow for accounts with varying levels of access and permissions. Some account types have configurations which may modify their respective permissions to meet your specific needs. Below is a short description of the major types.
Site Manager: 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.

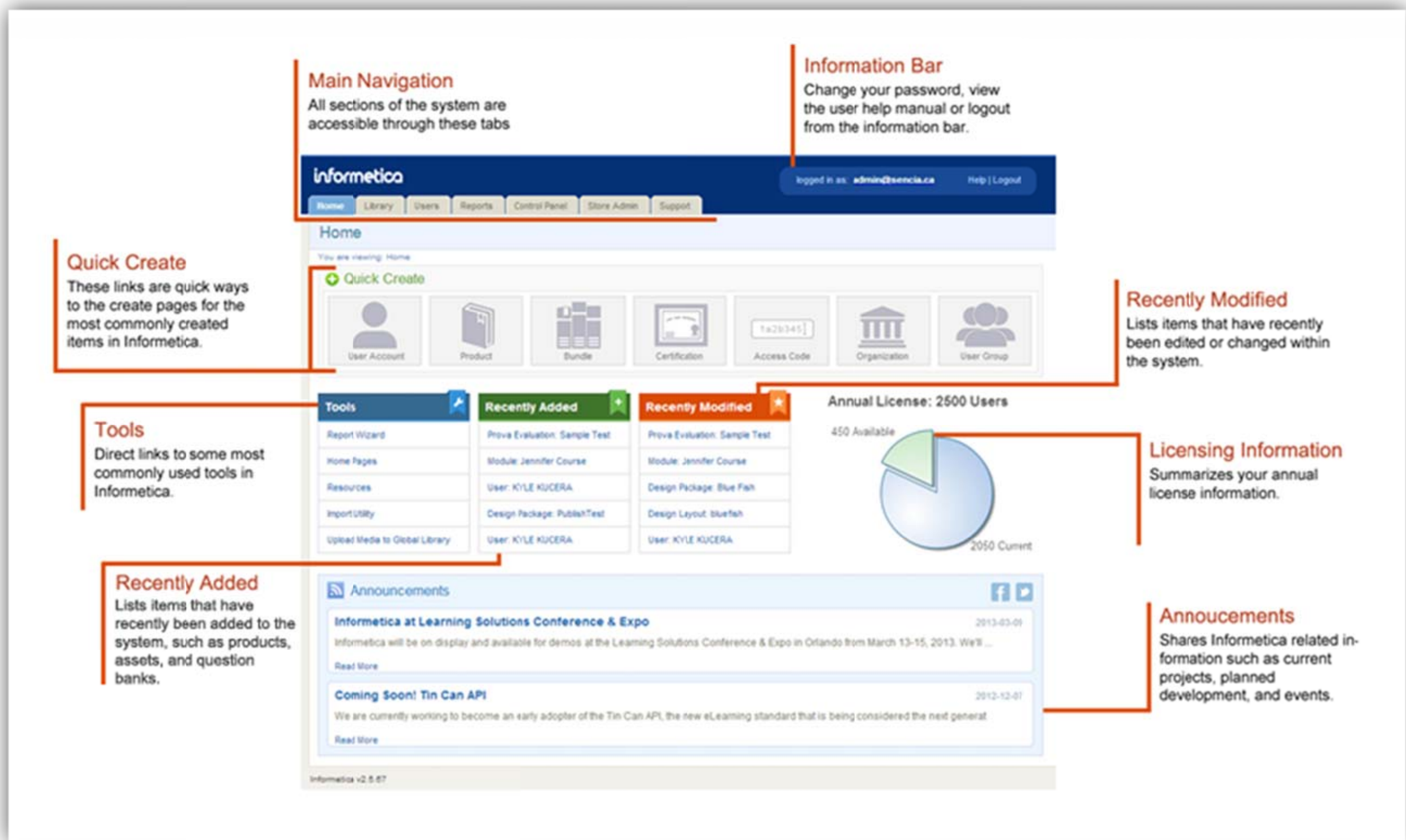


1.13 Spellchecker

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

The home page contains links to commonly used site manager features and tools as well as a navigation trail to your previous page path.



Main Navigation	
All sections available to a site manager are accessible through the Main Navigation tabs at the top.	
Library	Click the library tab to navigate to products, media, bundles, certifications, curriculum, and classifications.
Users	Click the users tab to navigate to access codes, accounts, campuses, user groups, and site managers.
Reports	Click the reports tab to run reports in the system.
Control Panel	Click the control panel tab to navigate to the calendar, languages, security, emails, import tool, and dictionaries.
Support	Click the support tab to navigate to the service request system (SRS tool), resources, and projects.

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	Logout instead of simply closing the browser window to ensure that any changes are saved and your session is properly recorded.

Information bar Licensing Information
This pie chart summarizes your annual license status.
The number of accounts available is shown in green.
The number of current accounts is shown in blue. This includes inactive users.
The chart does not show archives users, as these do not count toward your annual license.
Old versions of Internet explorer (IE 6,7,8) will not show the chart. Instead, the data will show as follows:

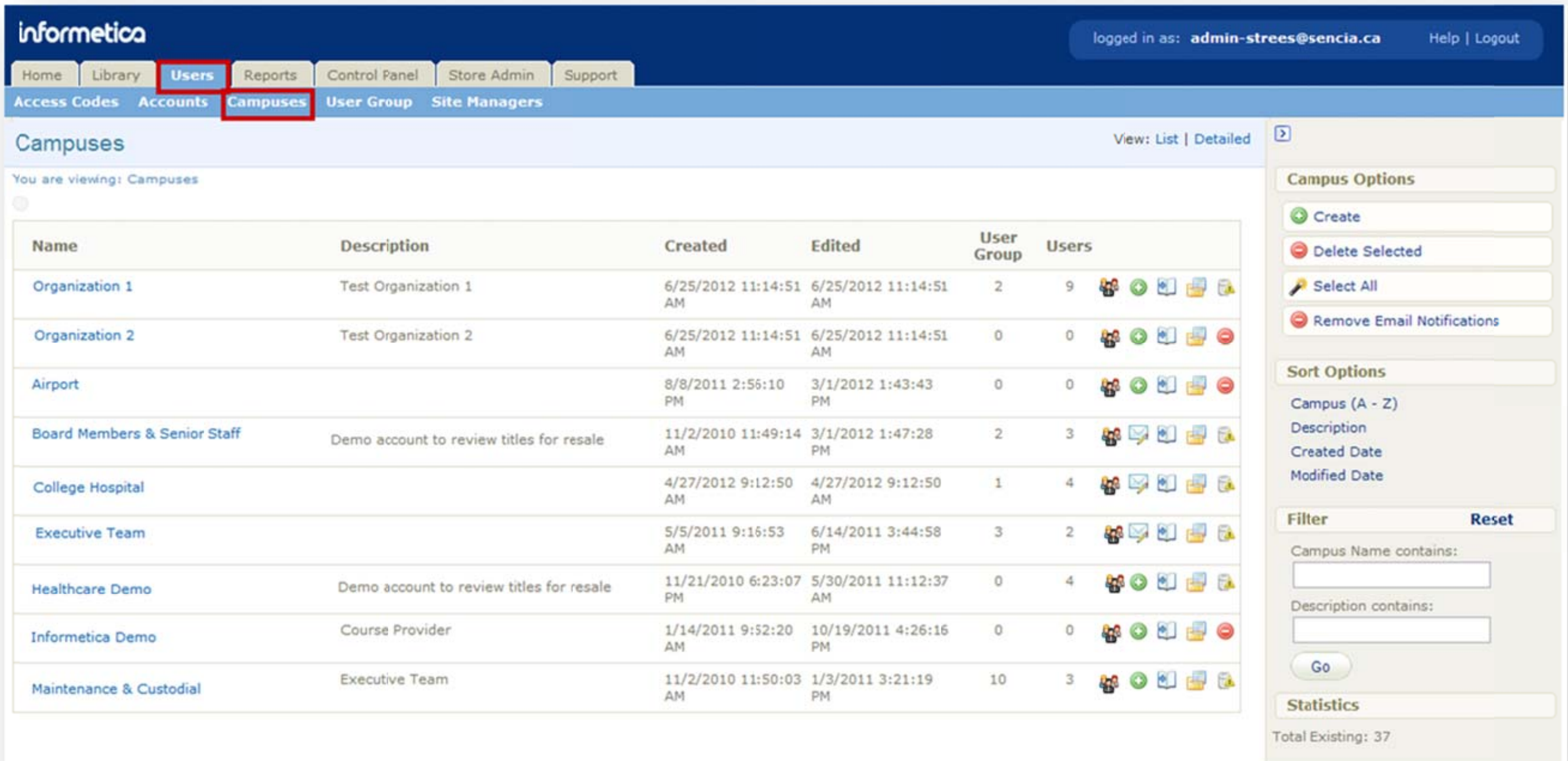
3. Campuses / Organizations

Informetica's unique, flexible architecture gives site managers the ability to create and manage multiple campuses (also known as organizations) that allow each campus to have a fair measure of its own administrative abilities. A campus is a way of grouping user groups, products, access codes, and bundles together. The cornerstone of setting up Informetica is the ability to create and manage multiple, distinct groups of users. To create this environment, you must create at least one campus. A campus should correspond to a broad based area, such as a region or separate company within your training environment.

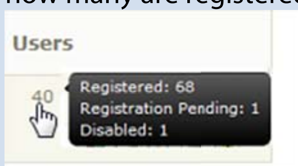
Topics Covered In This Chapter

3.1 The Campuses Page

To navigate to campuses, click the users tab at the top of the page and then select campuses along the top bar. This is an example of a campuses page from the list view.

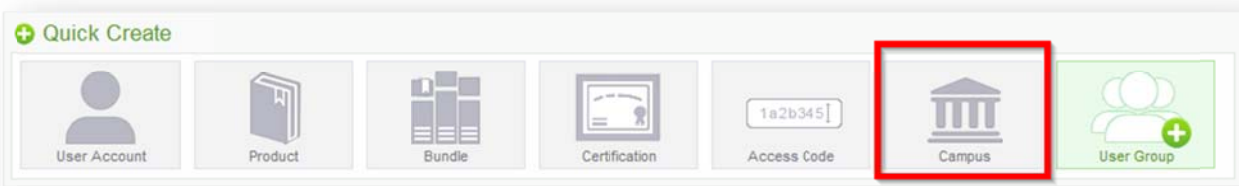


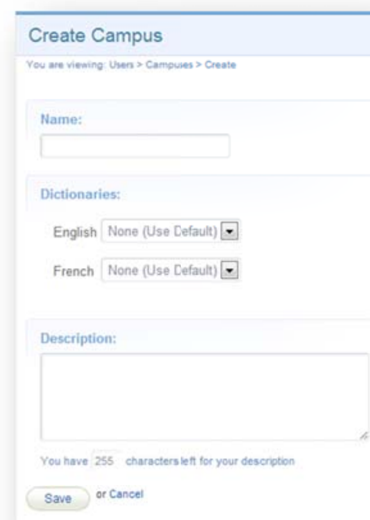
Brief description of the fields:

Field	Description	Interactive
Name	The name of the campus.	Yes
Description	The descrption of the campus. Descriptions are optional.	No
Created	Shows when the campus was created.	No
Edited	Indicates when the campus was last edited.	No
User Group	Shows the number of user groups that belong to this campus.	No
Users	Shows the total number of users that belong to this campus. Hover over any user count in the campus list to see how many are registered, have registrations pending or are disabled accounts. 	Yes

3.2 Create a Campus

Select **Create** in the campus options menu on the right. Alternatively you can create a new campus from the home page under quick create by clicking campus. Either method will bring you to the create campus screen.





Brief description of the fields:

Field	Description	Input
Name	Enter a name for the campus.	Required
Dictionaries	Select an available dictionary to be the default language for this campus.	Required
Description	Enter a description for the user group. The description is not publicly displayed.	Optional
Save	Click the save button to create the new campus and be returned to the main campus page or hit cancel to stop the creation.	Required

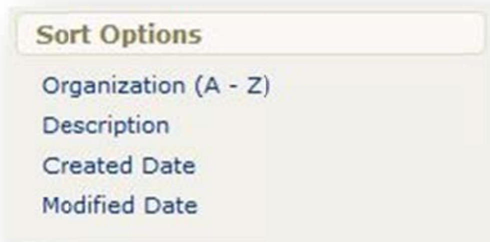
3.3 Change a Campus Name or Description

- From list view, click the name of the campus, make your changes within the edit window that pops up, and then save the changes.

- From detailed view, click the edit link within the details box, make your changes within the edit window that pops up, and then save the changes.

3.4 Sort and Filter Campuses

Campuses are sorted alphabetically by default.To change the order in which the list of campuses is displayed, click any of the options under the sort options menu on the right hand side: alphabetically by name (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). To show only specific campuses, use the Filter menu on the left to help you find a campus by typing in a simple search term. This is particulary useful if you have many campuses.

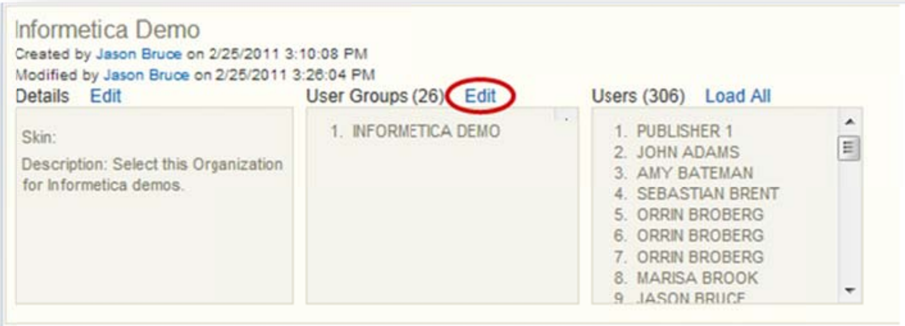


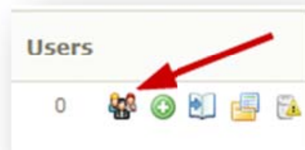
Below is a brief description of the fields:

Field	Description	Click Go
Reset	Choose the reset link at the top of the filter options menu to remove any filters.	Click Reset
Campus name contains:	Enter a word or two that is contained in the name of the campus.	Required
Description contains:	Enter a word or character contained in the campus description.	Required

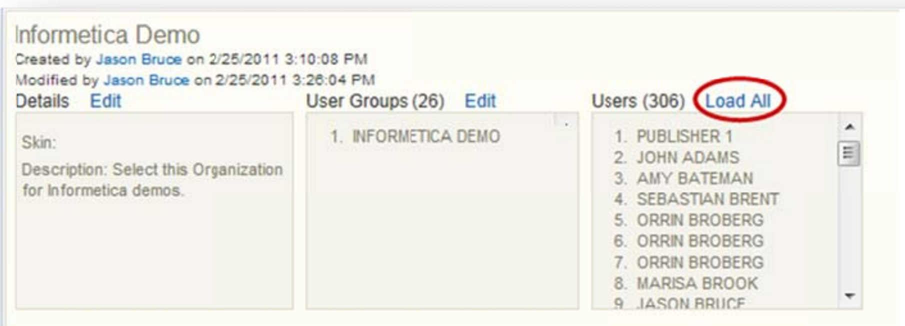
3.5 Add or Remove User Groups

To add or remove user groups to the campus, click edit next to user groups in the information box from detailed view or click the user groups button from list view. After making changes, choose **Save** and you will be returned to the main campuses page.





3.6 View Users Belonging to the Campus



When in detailed view, you can see a list of users belonging to the campus. Informetica truncates large lists of users to show only 100 at a time, ensuring that the page will load more quickly. This is particularly helpful for clients that have thousands of users! If there are more than 100 users, and you wish to see them all, make sure you are in detailed view and then click the load all link from the users box.

3.7 Delete or Deactivate a Campus

When deleting a campus, users will remain assigned to the associated user groups unless you manually reassign or remove them. From detailed view, select the campus you would like to permanently delete by clicking it and then clicking the delete button on the right hand side of the information box. From list view, click the delete icon on the far right next to the campus you wish to delete. After deleting, you will be returned to the main campuses page. You must remove all user groups from a campus to effectively deactivate it. Deleting a campus will remove all of the campus emails as well. The Site Manager will be prompted to select a new default campus for any users that this affects.

Can't Delete the Campus?

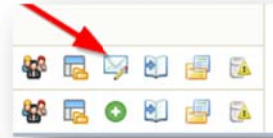
You cannot delete campuses that have users assigned until you move users to a different campus. If you cannot delete a campus you will see:

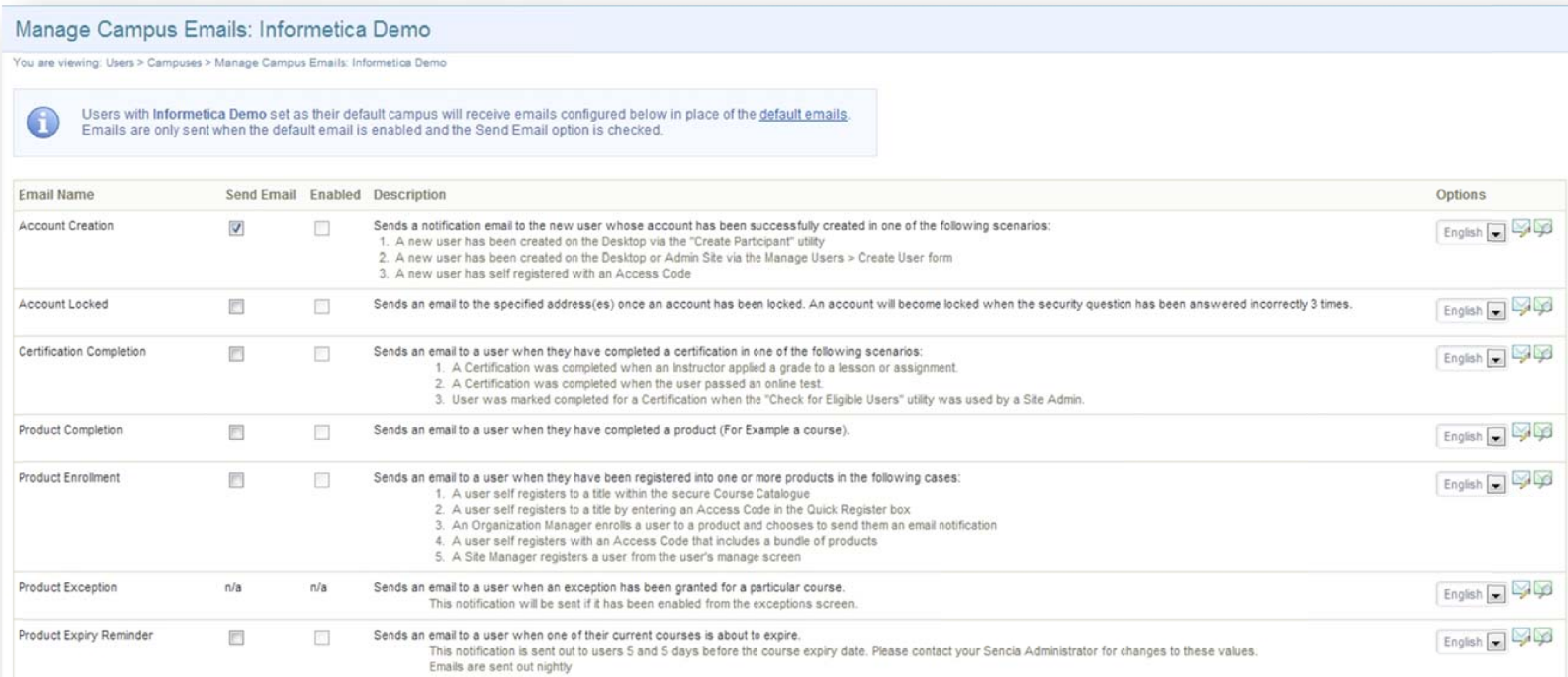
- a strikethrough the delete button
- an exclamation point on the delete icon

Click either indicator for more details.

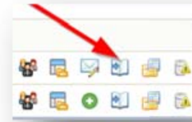
3.8 Add or Edit Email Notifications

You can activate selected automatic email notifications for a specific campus and set them as a default, overriding the LMS notification defaults. Select the email icon for the campus to open a page containing the description of the notification. You can also select which automatic email notifications you would like to enable for the campus, edit the email content, preview the email, and edit a signature for the email. For more information on campus emails, visit the Notification Emails chapter of this manual.



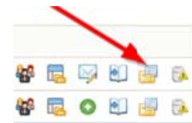


3.9 Dictionaries



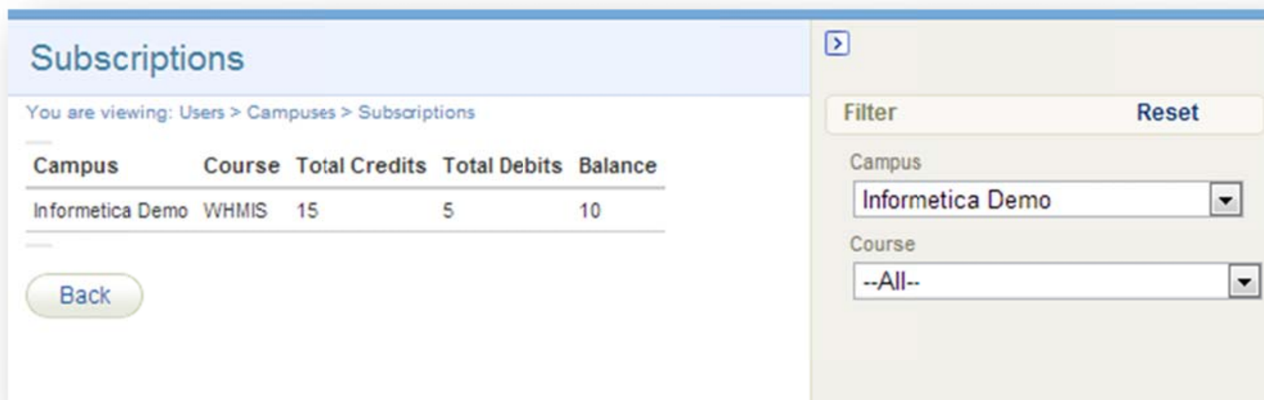
Select **Dictionaries** in the information box, use the drop down boxes to select the language dictionaries the campus will use, and then **Save**. Visit the Languages and Dictionaries portion of this manual to learn how to set up and customize dictionaries.

3.10 Subscriptions



Subscriptions are available to clients with eCommerce and are automatically created by campus managers when ordering a specific number of products for their own use. From the main campuses page, select **Subscriptions** for any campus to view the subscriptions page for that campus. You can use the filter options to view a different campus or view subscriptions by product. Subscriptions will inform you about:

- The name of the product that the subscriptions were generated for.
- The number of credits that were purchased for the subscription (total credits).
- The number of credits that have been used (total debits)
- The number of credits remaining on the subscription (balance).



4. 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

User Types

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.

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.

Campus Admin

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

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, multiple classifications, and 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.

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.

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.

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.

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.

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.

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.

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.

Proctor

Creating a proctored exam requires that a Proctor must authorize the exam before the user may attempt the test. This option is used for exams that are administered under supervision. You must have your Prova test configured as a Proctored test. Any Proctors in the same Campus and User Group as the test taker may approve a test. This is done by signing in on the test page.

User Roles and Permissions

LEGEND

✓ Standard for this user type

☑ Optionally available for this user type

No Not available for this user type

USERS & ACCOUNT MANAGEMENT Permission vs. Role	Site Manager	Campus Admin	Campus Manager	User Group	Publisher	Instructor	Help Desk	Rep	Proctor	Participant
Activate & Deactivate Users	✓	☑	☑	No	No	No	✓	No	☑	No
Create and Edit User Accounts	✓	☑	☑	No	No	✓	No	No	☑	No
Create and Manage User Groups	✓	☑	☑	No	No	No	No	No	☑	No
Create Administrative User Types	✓	No	No	No	No	No	No	No	No	No
Manage Users' Classifications	✓	☑	☑	☑	No	No	☑	No	☑	No
Archive Users	✓	☑	☑	No	No	No	☑	No	No	No
Delete Users	✓	No	No	No	No	No	No	No	No	No
Edit and Delete Classifications	✓	☑	☑	No	No	No	No	No	No	No
Import Users from Excel	✓	☑	☑	No	No	No	No	No	No	No
Manage Multiple Classification Setups	✓	☑	No	No	No	No	No	No	No	No
Manage User Roles and Permissions	✓	No	No	No	No	No	No	No	No	No
Update User Profile & Passwords	✓	☑	☑	No	No	No	☑	No	✓	No
View Archived Accounts	✓	No	No	No	No	No	✓	No	✓	No
View User Profile Information	✓	☑	☑	No	No	✓	No	No	☑	No

ADMINISTRATIVE & COMMUNICATION Permission vs. Role	Site Manager	Campus Admin	Campus Manager	User Group	Publisher	Instructor	Help Desk	Rep	Proctor	Participant
Assign Forum Moderators	✓	No	No	No	✓	No	No	No	No	No
Create Calendar Entries for Course Start/End Dates	✓	✓	No	No	✓	☑	No	No	No	No
Create Campuses	✓	No	No	No	No	No	No	No	No	No
Create Events/News for Entire System (Global)	✓	No	No	No	No	No	No	No	No	No
Create Events/News for Groups	✓	✓	✓	✓	No	No	No	No	No	No
Create Events/News for Individual Users	No	✓	✓	✓	✓	No	No	No	No	No
Create Events/News for Specific Courses	No	✓	✓	✓	✓	✓	No	No	No	No
Create Personal Tasks	No	✓	✓	✓	✓	✓	No	✓	✓	✓
Create System Support Tickets	✓	No	No	No	No	No	No	No	No	No
Email to Entire Class Roster	✓	✓	No	No	✓	✓	No	No	No	No
Manage eCommerce Products	✓	No	No	No	No	No	No	No	No	No
Manage Home Pages and Content	✓	☑	No	No	☑	No	No	No	No	No
Manage Language Dictionaries	✓	No	No	No	No	No	No	No	No	No
Manage Security Features	✓	No	No	No	No	No	No	No	No	No
Monitor and Participate in Forums and Course Chat	No	☑	☑	☑	☑	☑	No	No	No	☑
Monitor Feedback via Affidavits	✓	✓	✓	✓	✓	✓	No	No	No	No
Run Reports	✓	☑	☑	☑	☑	☑	☑	✓	☑	No
Set Up Automated Email Notifications	✓	No	No	No	No	No	No	No	No	No

ENROLLMENTS AND REGISTRATIONS Permission vs. Role	Site Manager	Campus Admin	Campus Manager	User Group	Publisher	Instructor	Help Desk	Rep	Proctor	Participant
Create and Manage Access Codes	✓	☑	☑	No	No	No	No	No	No	No
Create Bundled Course Offerings	✓	No	No	No	No	No	No	No	No	No
Enroll Users to Courses & Groups via Access Codes	✓	☑	☑	☑	No	No	No	No	No	No
Grant Course and Test Extensions, Additional Attempts	✓	☑	☑	☑	☑	☑	☑	No	☑	No
View Course and Test Extensions, Additional Attempts	✓	☑	☑	☑	☑	☑	☑	No	☑	No
Grant Curriculum Exemptions	No	No	No	No	No	No	☑	No	No	No
Import Enrollments from Excel	✓	✓	✓	No	No	No	No	No	No	No
Take/Consume Courseware	No	☑	☑	☑	☑	☑	No	☑	☑	☑
View and Purchase Subscriptions	✓	☑	☑	No	No	No	No	No	No	No
View Class List	No	✓	✓	✓	✓	✓	No	No	No	☑
View Users' Consumed Access Codes	✓	✓	✓	✓	✓	✓	✓	No	☑	No

GRADES AND PROGRESS Permission vs. Role	Site Manager	Campus Admin	Campus Manager	User Group	Publisher	Instructor	Help Desk	Rep	Proctor	Participant
Approve Experience Logs	No	✓	✓	✓	✓	✓	✓	No	No	No
Create Certifications	✓	No	No	No	No	No	No	No	No	No
Enable Automated Course Enrollments	✓	✓	No	No	✓	No	No	No	No	No
Import Certifications, Grades & SCORM Progress	✓	✓	✓	No	No	No	No	No	No	No
Manage Users' Supplemental Training	✓	☑	☑	☑	No	No	No	No	No	No
Manually Approve Course Completion	No	No	No	No	No	✓	No	No	No	No
Manually Grade Modules, Essays, Assignments	✓	No	No	No	✓	✓	No	No	No	No
View Users' Certifications	✓	✓	✓	✓	✓	✓	No	No	☑	No
View Users' Course Progress and Results	✓	✓	✓	✓	✓	✓	No	No	No	No
View Users' Supplemental Training	✓	☑	☑	☑	No	No	No	☑	No	No

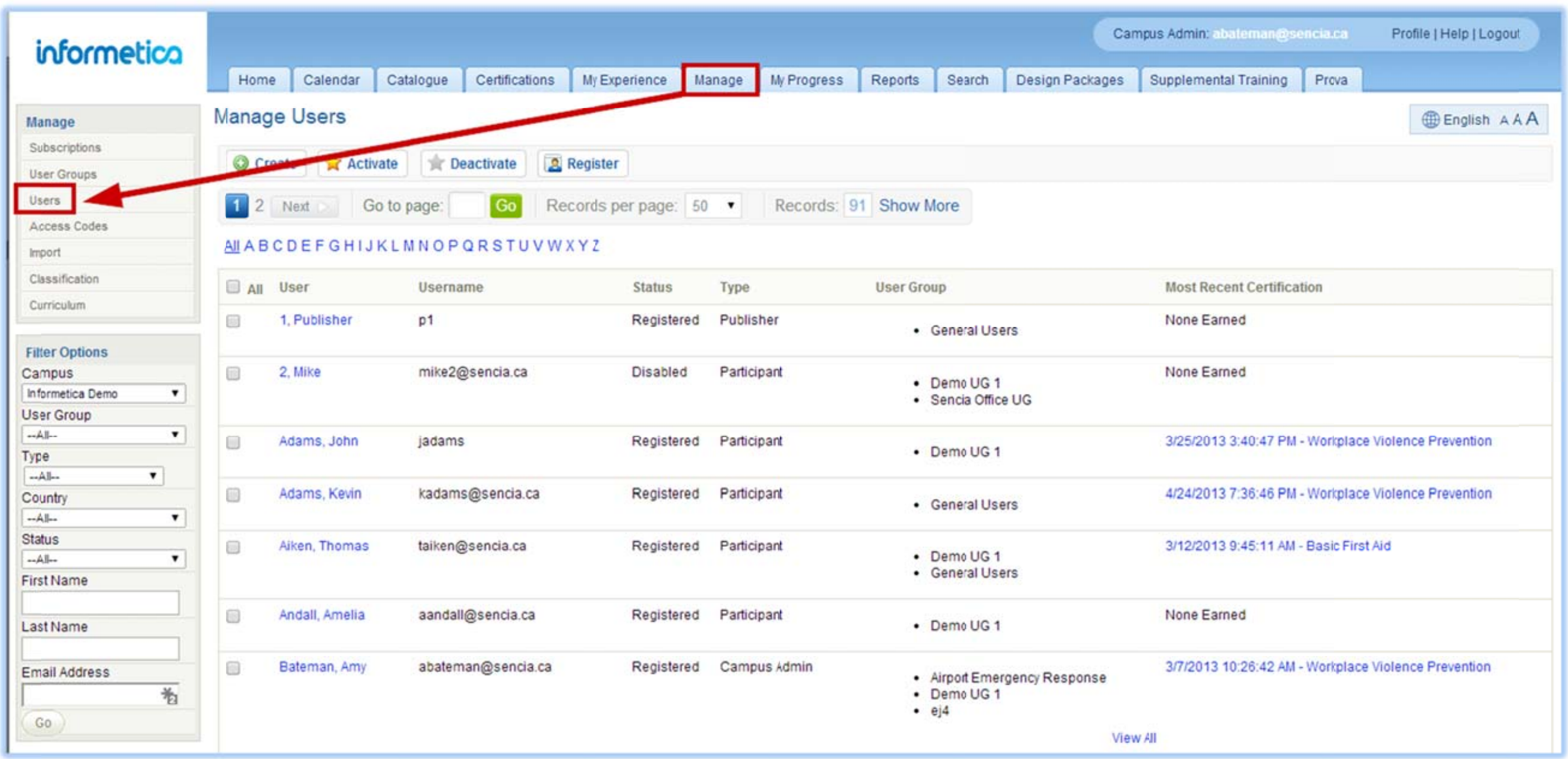
CREATION & MANAGEMENT OF COURSES & TESTS Permission vs. Role	Site Manager	Campus Admin	Campus Manager	User Group	Publisher	Instructor	Help Desk	Rep	Proctor	Participant
Access Question Banks	✓	☑	No	No	☑	No	No	No	No	No
Activate and Deactivate Courses and Course Assests	✓	✓	No	No	✓	No	No	No	No	No
Create Affidavits	✓	✓	No	No	✓	No	No	No	No	No
Create and Edit Courses and Course Content	✓	✓	No	No	✓	No	No	No	No	No
Create and Manage Curriculum	✓	☑	☑	No	No	No	No	No	No	No
Create Testing Materials, Questionnaires, Appraisals	✓	✓	No	No	✓	No	No	No	No	No
Delete Courses	✓	No	No	No	No	No	No	No	No	No
Delete Files and Course Assests	✓	✓	No	No	✓	No	No	No	No	No
Edit Design Packages and Layouts	✓	☑	No	No	☑	No	No	No	No	No
Export Informetica-Created Courses to SCORM	✓	✓	No	No	✓	No	No	No	No	No
Manage Availability of Courses, Tests, and Assets	✓	✓	No	No	✓	No	No	No	No	No
Manage Course Descriptions	✓	No	No	No	No	No	No	No	No	No
Reset Exams and Override Exam Responses (Classic)	✓	No	No	No	No	No	No	No	No	No
Set Prerequisites Among Courses	✓	No	No	No	No	No	No	No	No	No
Set Prerequisites Among Course Assets	✓	✓	No	No	✓	No	No	No	No	No
Upload 3rd Party Courses (e.g. Captivate, Articulate)	✓	✓	No	No	✓	No	No	No	No	No
Upload Documents, Images, Videos, etc.	✓	✓	No	No	✓	No	No	No	No	No
Upload Large Files via Informetica FTP	✓	☑	No	No	☑	No	No	No	No	No

Manage Users

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.

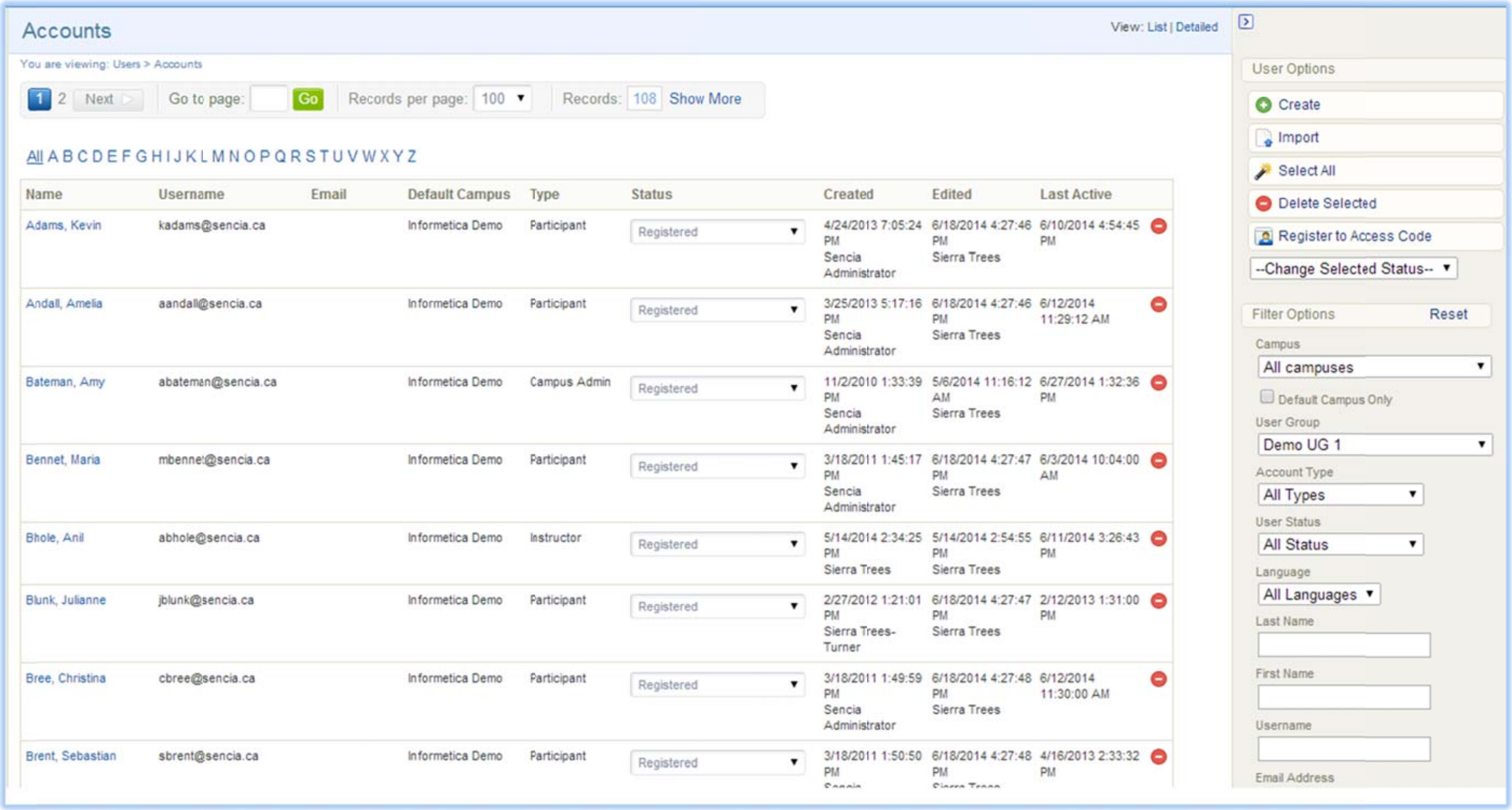


For Site Managers

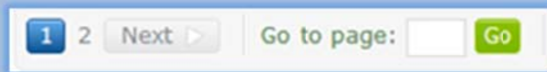
Below is a brief description of the fields:

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.


Accounts
View: List | Detailed
You are viewing: Users > Accounts
1 2 Next
Go to page: Go
Records per page: 100
Records: 108 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
Adams, Kevin kadams@sencia.ca Informetica Demo Participant Registered 4/24/2013 7:05:24 PM Sencia Administrator 6/18/2014 4:27:46 PM Sierra Trees 6/10/2014 4:54:45 PM
Andall, Amelia aandall@sencia.ca Informetica Demo Participant Registered 3/25/2013 5:17:16 PM Sencia Administrator 6/18/2014 4:27:46 PM Sierra Trees 6/12/2014 11:29:12 AM
Bateman, Amy abateman@sencia.ca Informetica Demo Campus Admin Registered 11/2/2010 1:33:39 PM Sencia Administrator 5/6/2014 11:16:12 AM Sierra Trees 6/27/2014 1:32:36 PM
Bennet, Maria mbennet@sencia.ca Informetica Demo Participant Registered 3/18/2011 1:45:17 PM Sencia Administrator 6/18/2014 4:27:47 PM Sierra Trees 6/3/2014 10:04:00 AM
Bhole, Anil abhole@sencia.ca Informetica Demo Instructor Registered 5/14/2014 2:34:25 PM Sierra Trees 5/14/2014 2:54:55 PM Sierra Trees 6/11/2014 3:26:43 PM
Blunk, Julianne jblunk@sencia.ca Informetica Demo Participant Registered 2/27/2012 1:21:01 PM Sierra Trees-Turner 6/18/2014 4:27:47 PM Sierra Trees 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 6/18/2014 4:27:48 PM Sierra Trees 6/12/2014 11:30:00 AM
Brent, Sebastian sbrent@sencia.ca Informetica Demo Participant Registered 3/18/2011 1:50:50 PM 6/18/2014 4:27:48 PM 4/16/2013 2:33:32 PM
User Options
Create
Import
Select All
Delete Selected
Register to Access Code
--Change Selected Status--
Filter Options Reset
Campus
All campuses
Default Campus Only
User Group
Demo UG 1
Account Type
All Types
User Status
All Status
Language
All Languages
Last Name
First Name
Username
Email Address

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

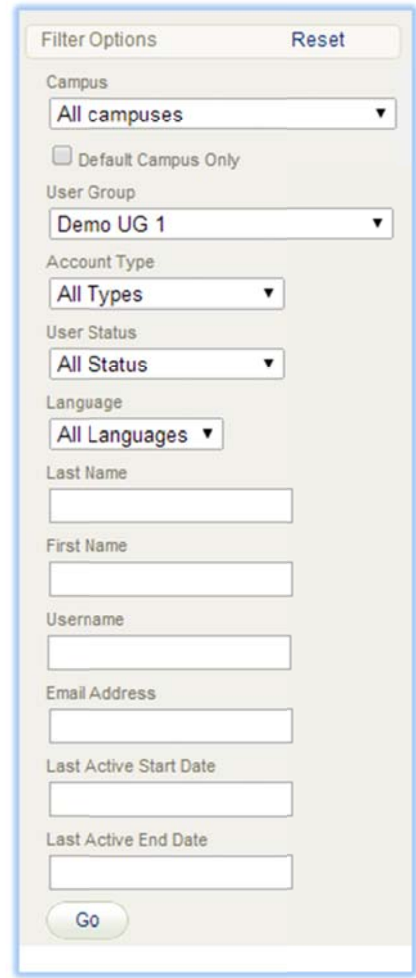
Field	Description	Interactive
Page Navigation bar	Click a page number, the next button to enter a number in the go to page field 	Yes
Alpha Filter bar	Click any letter to filter to see only those accounts whose last names start with the letter selected. 	
Show More	Click “show more” to see a list of 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
Email	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	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	The last timestamp of when the user logged in.	No
Delete	Click the delete icon to delete a user account.	Yes
Registration to Access Code	Select users and register them to existing access codes to give them access to the user groups and products associated to those access codes. You can opt to send an email alert to the users.	Yes

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 and select **Go**. By default, users are sorted alphabetically by Last Name. Below is a brief description of the fields, note that some of them are available only to site managers:

Description of the filter options

Filter Option	Description
Reset	Choose the reset link at the top to remove any filters.
Campuses	Use the drop down menu to see users assigned to a specific campus.
User Group	Use the drop down menu to see users assigned to specific user groups.
Account Type	Use the drop down menu to see users that are a specific user type.
User Status	Use the drop down menu to see only accounts that have a specific status (registered, registration pending, disabled or archived).
Language	Use the drop down menu to see only accounts using a specific language.
Name	Type in a full or partial name: first, last or username.
Email Address	Enter a full or partial email address.
Last Active Start/End Date	Use these two fields to create a date range to search for accounts based on activity level. Last active start date is the last timestamp when the user logged in. Last active end date is the timestamp when the user last logged out.



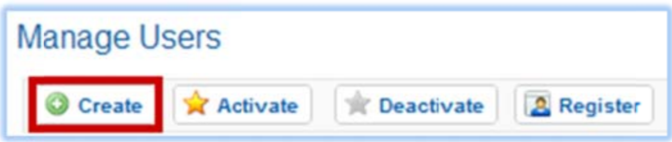
Customized Filters

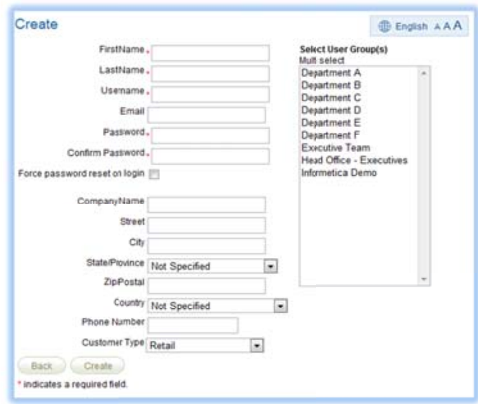
The filter names may be customized for your system and therefore differ from the examples in this manual.

Create Users

For Campus Admins / Campus Managers

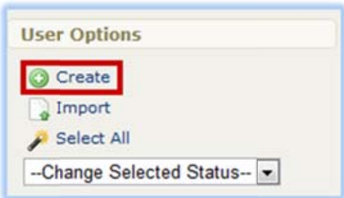
To create a new participant account, click the create button from the manage users page. Fill out all of the required fields (indicated with a red asterisk *) and select at least one user group. Click the create button at the bottom or click back to cancel the creation and return to the manage users 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.

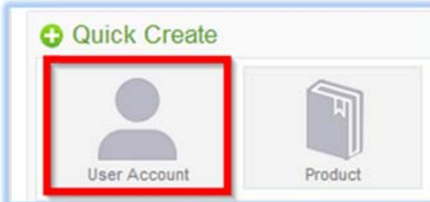


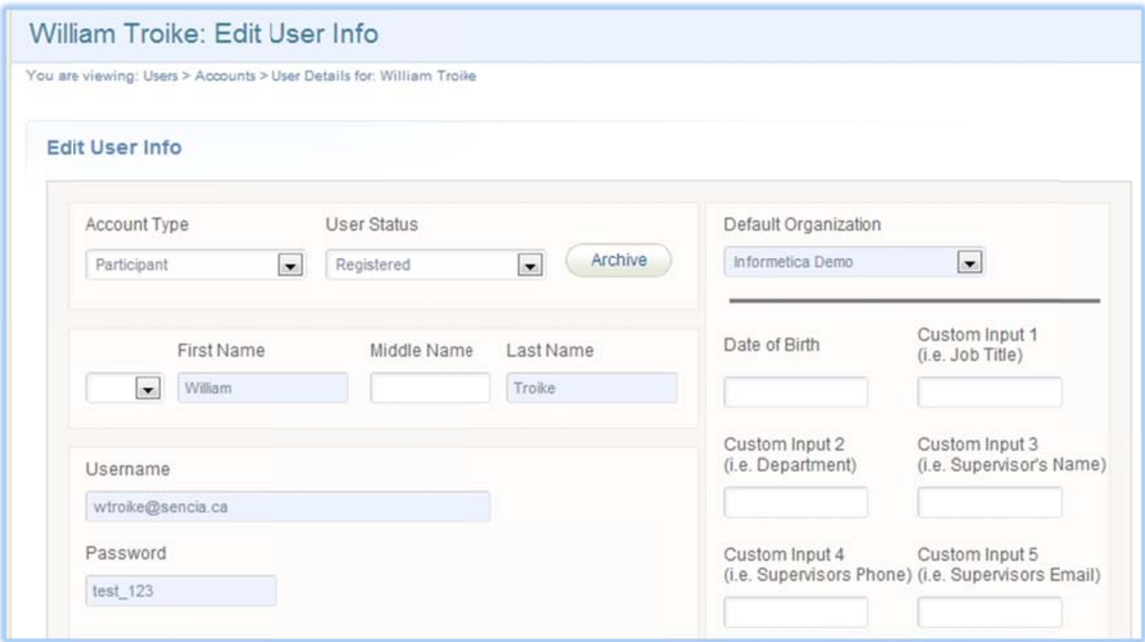


For Site Managers

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.







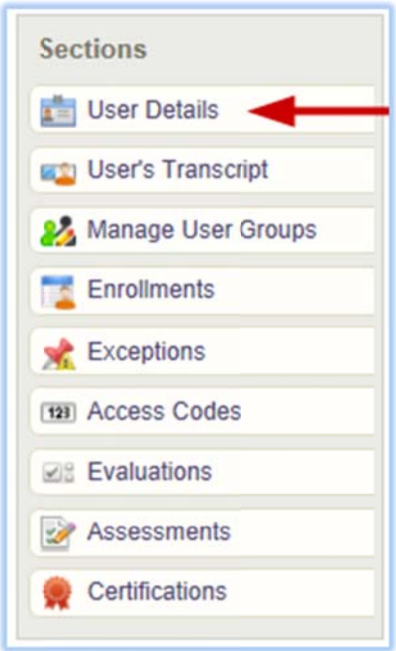
User Info Field Descriptions

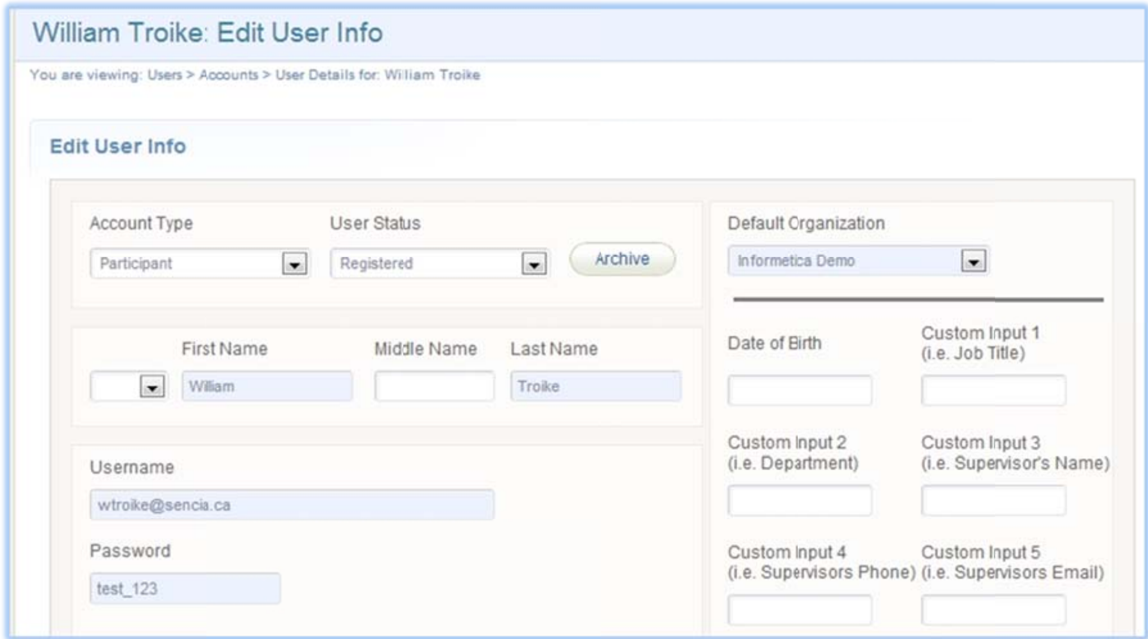
The fields set up for your Informetica system may differ than those listed below. What follows is a list of common fields.

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.

Edit User Details

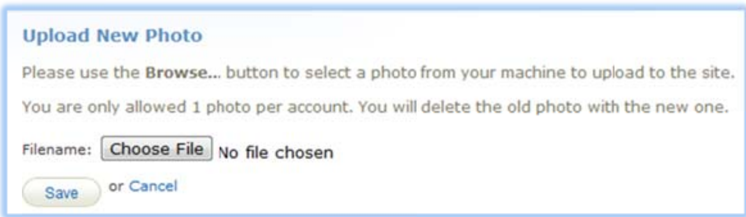
Click on any user's name to open the Edit User Info page. If you navigate away from this page, simply click the User details link in the sections menu on the left to return to it. Alternatively, you can update many user accounts at once using the Import Tool. This is covered in the Importing Data chapter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

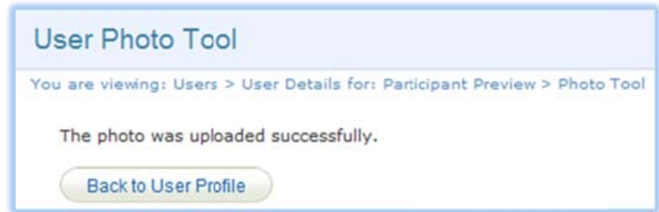


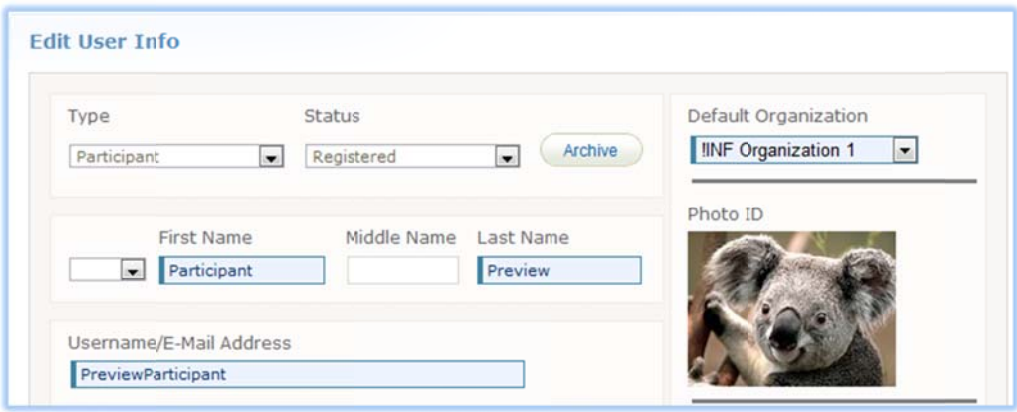


Upload a User Photo

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.





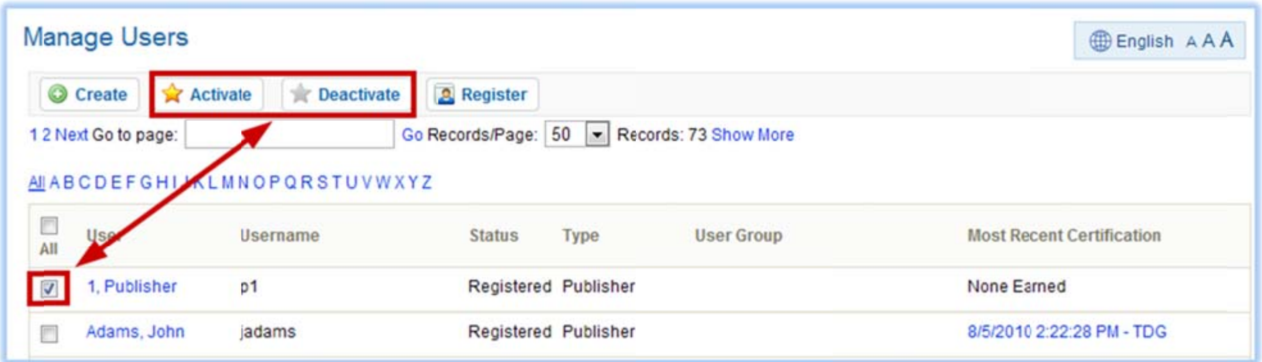


The photo will now show up in the user's profile.

Activate or Deactivate Users

For Campus Admins and Campus Managers

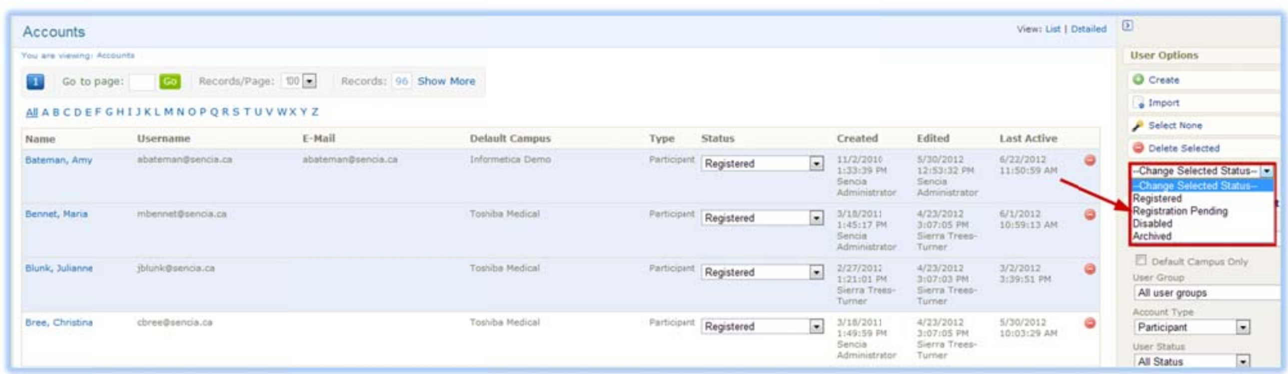
From the manage users screen, you can activate or deactivate users. This affects their access to the Informetica system.



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.

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.



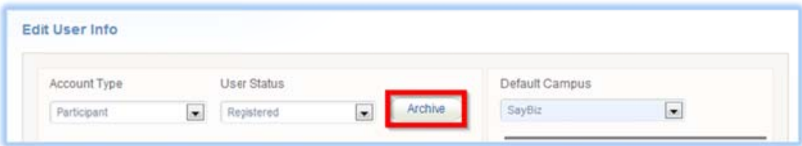
Archive Users

Archived users do not appear on reports and are not counted towards the total user count when determining Informetica licensing. Only users who no longer need to access the system for any reason should be archived. Reinstating archived users must be done via a request Sencia to re-activate the account.

Archive Users One at a Time

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

Archive a user from their profile by selecting **User Details** and then selecting the **Archive** button.



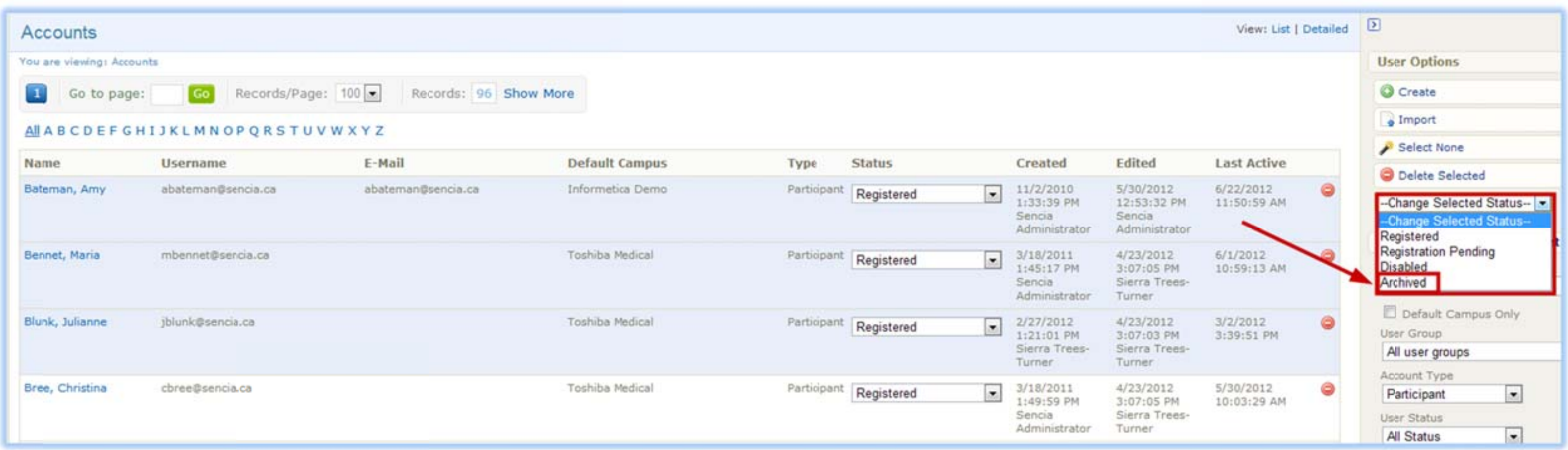
Archive Several Users at Once

This option is available to site managers

Archived Users Are Not on Reports

Archived users do not show in reports, however, systems enabled with the certification log can keep records of archived users who have obtained certifications within Informetica.

From the accounts page, highlight specific accounts and use the **Change Selected Status** drop down menu to archive the selected users. Use the filter options to help find specific users.

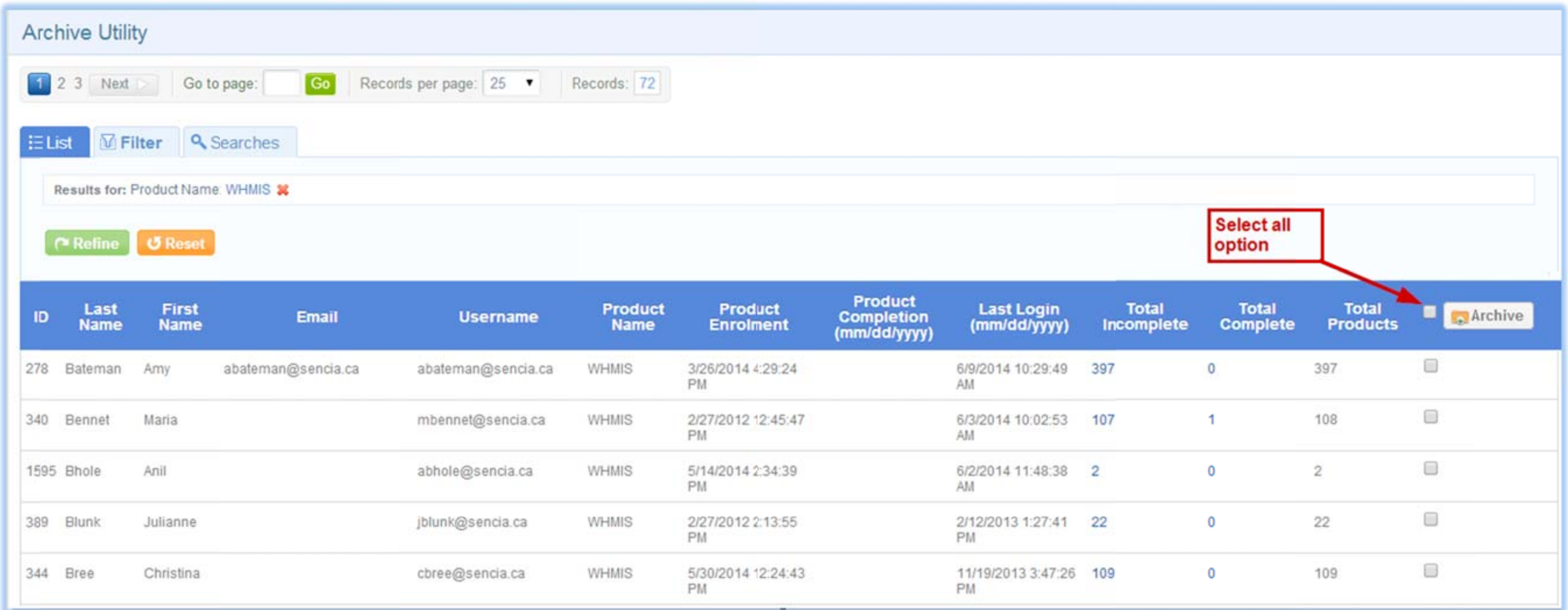


Archive Utility Tool

This feature is available to Site Managers..

The Archive Utility allows Site Managers to filter users and automatically archive them as a batch. Access the Archive Utility under the tools menu from the User Account page. Select the users you wish to archive and select the **Archive** button at the top of the list.

To access the certification log, select the Users tab and then select Archive Utility under the tools menu.



Sorts, Filters, and Saved Searches

You can sort and filter the log to view more specific results.

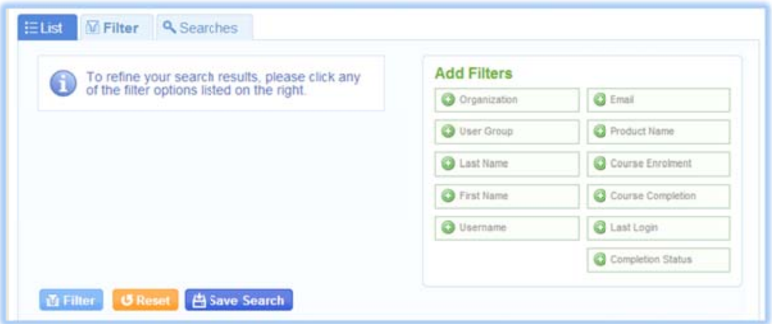
Click any of the headers to sort the list by that header's information.

Note that you may have additional filters available to you. The filter list shown below is not exhaustive.

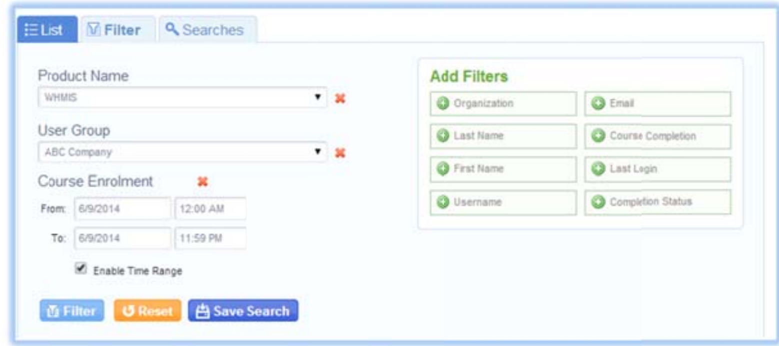
Filter

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.

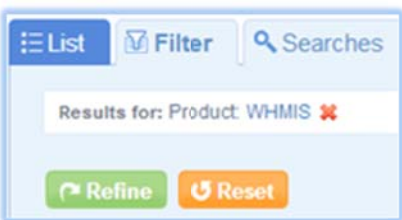
1. Select the **filter** tab to add one or more filters for refined log results.



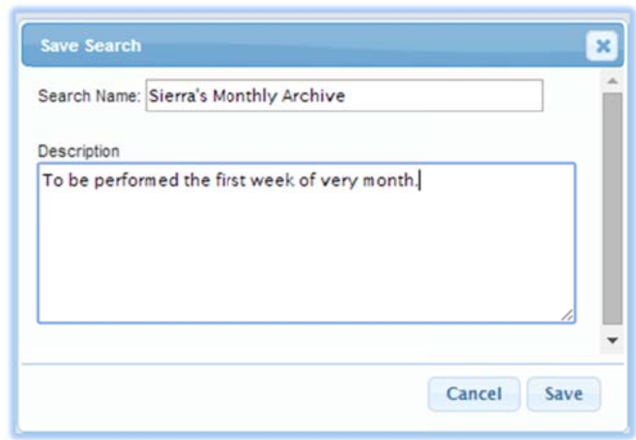
2. Enter any relevant data for your filters and then select **filter**.



3. After running a filter, you can select **Refine** to adjust your filter options or **Reset** the filter.



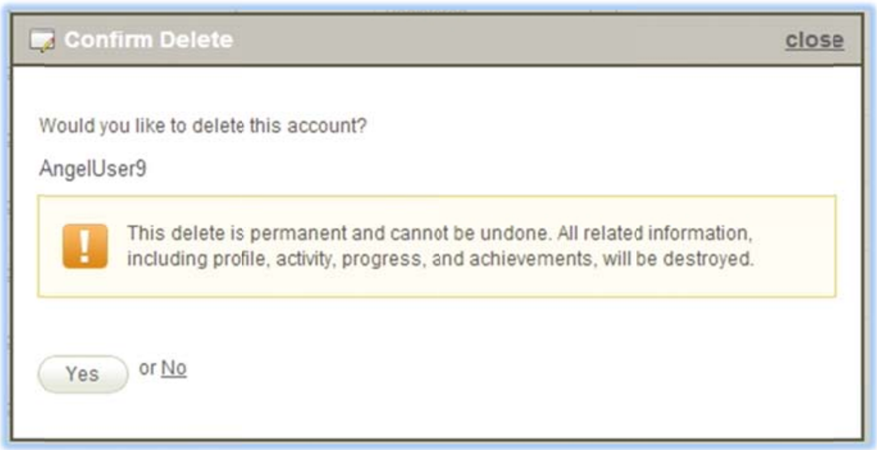
4. Select **save search** and give the search a unique name and description to make your filter available for easy repeated use. Saved filter searches can be accessed from the **searches** tab.



Delete Users

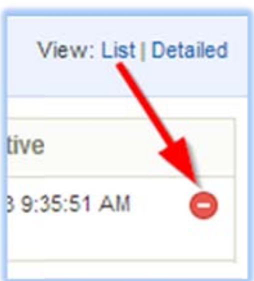
This feature is available to Site Managers.

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.



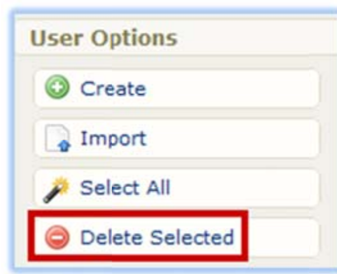
Delete one user

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.



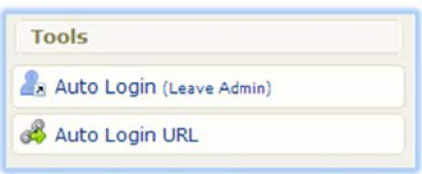
Auto Logins

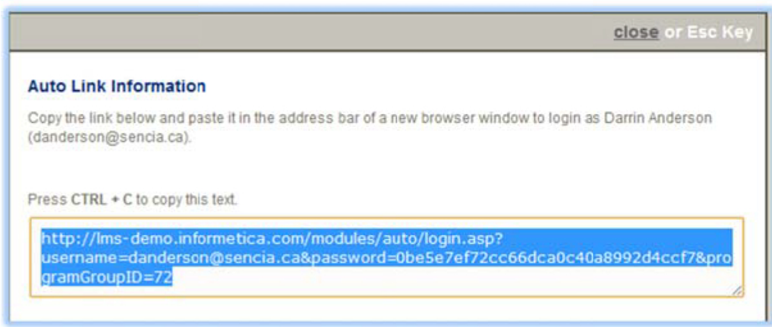
This feature is available to Site Managers.

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.

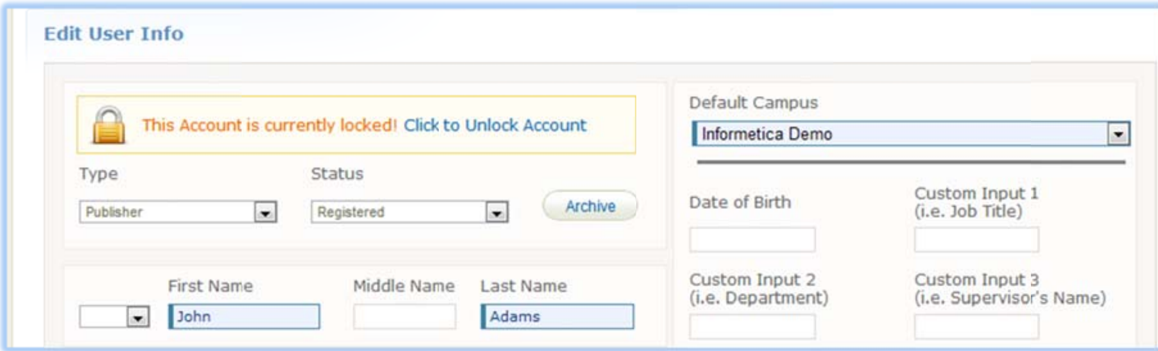


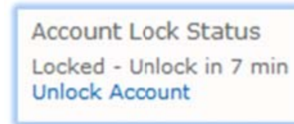


Locked Accounts

This feature is available 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.

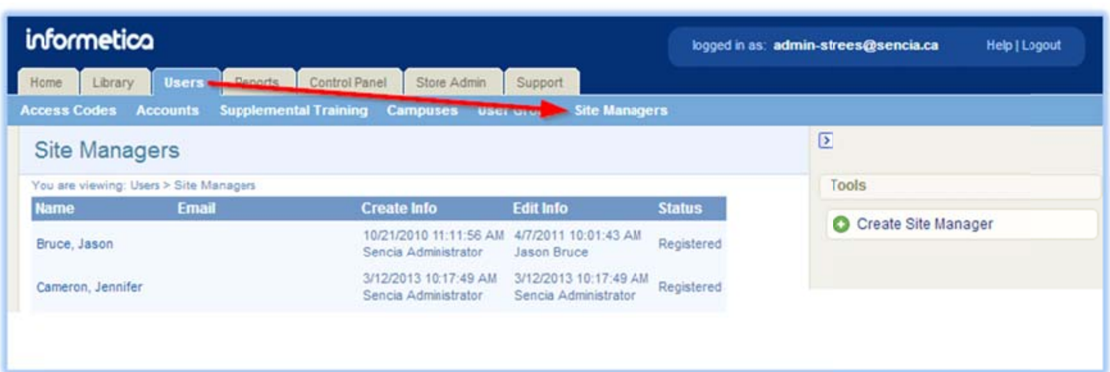




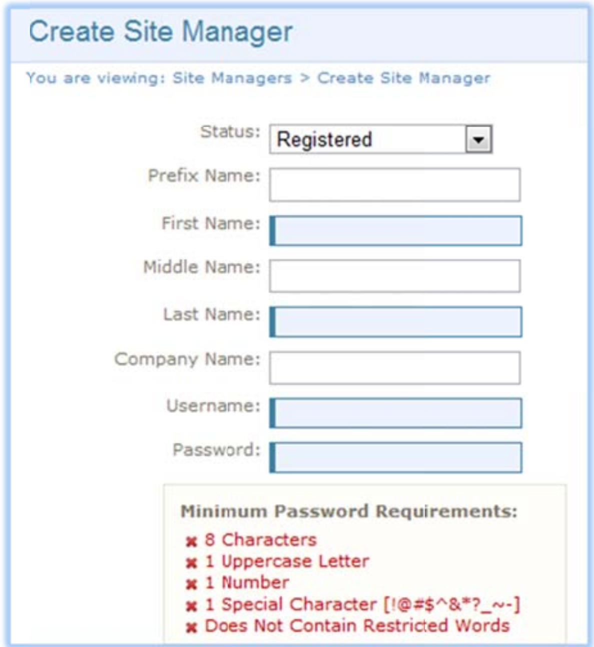
Site Manager Account Management

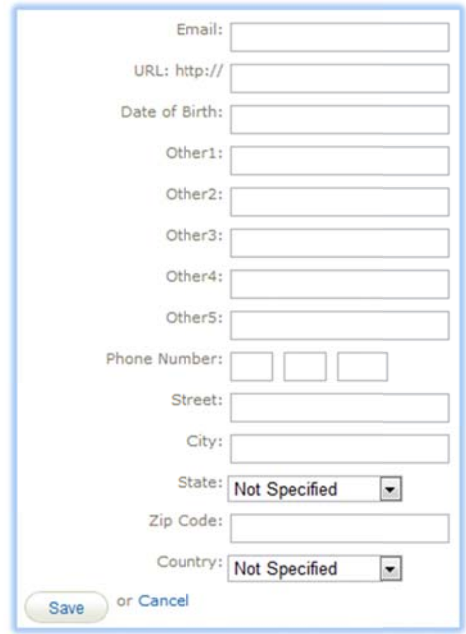
This feature is available to Site Managers.

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.

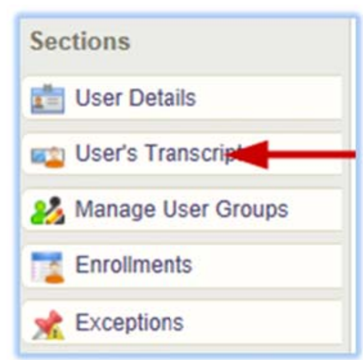




User’s Transcript

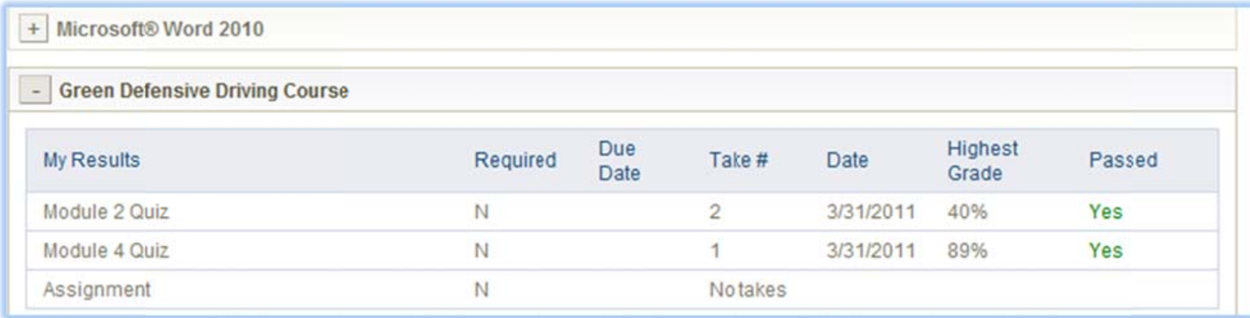
This feature is available to Campus Admins and Campus Managers, depending on system configuration.

To view a user’s transcript, select any user, and then select **User’s Transcript** from the sections menu to open the user’s transcript. The transcript will not show any information for products that have no gradable content or have not yet been attempted. Click the + symbol to expand the product and view the gradable assets:



- Classic and Prova Tests
- Scorm Content
- Questionnaires
- Assignments (must be published, see Assignments, Modules, and References in the Site Manager, Campus Admin, or Publisher user manuals)

- Modules (must be published, see Assignments, Modules, and References in the Site Manager, Campus Admin, or Publisher user manuals)



+ Microsoft® Word 2010

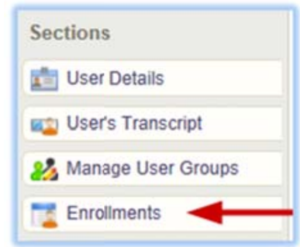
- Green Defensive Driving Course

My Results	Required	Due Date	Take #	Date	Highest Grade	Passed
Module 2 Quiz	N		2	3/31/2011	40%	Yes
Module 4 Quiz	N		1	3/31/2011	89%	Yes
Assignment	N		No takes			

For More about Transcripts

Visit the Grades and Certifications chapter in the Participant manual.

Product Enrollments / Registrations



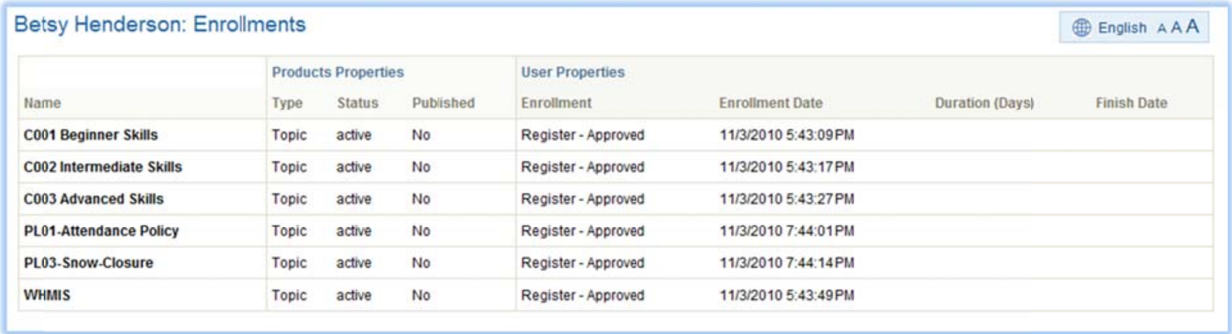
View the products that a specific user is enrolled in and when the products were completed. This section is where you can view, edit or add additional registrations to the user's organization, user group and products. The registration dropdown menus contain only the user groups that belong to the selected 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.

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 and then select **Enrollments** from the sections menu to open the enrollments page for the user.

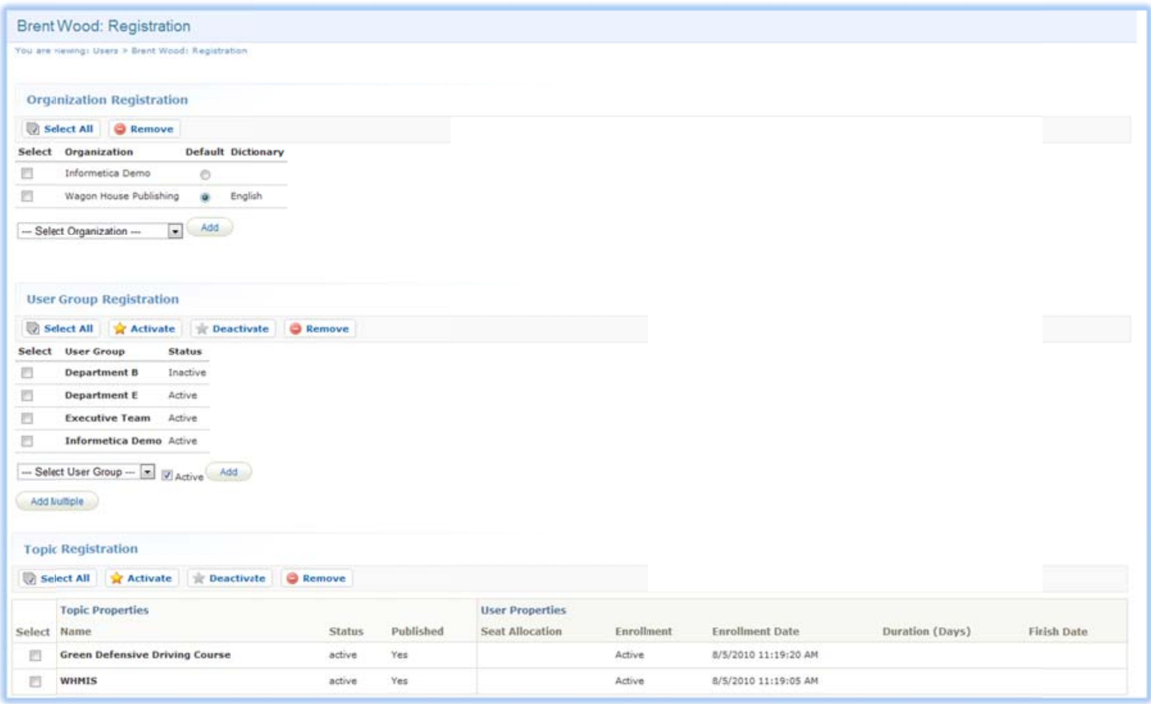

Betsy Henderson: Enrollments

English A A A

	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		

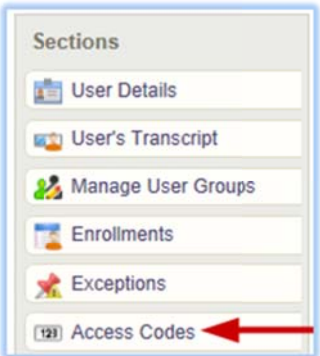
View as Site Manager

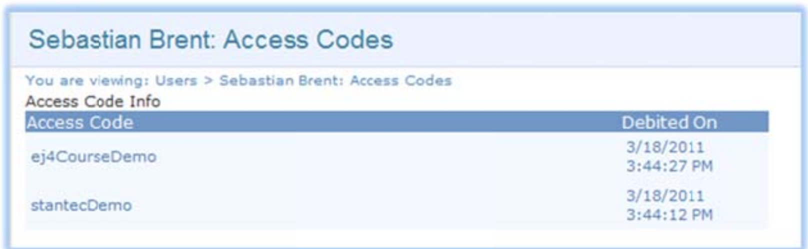
Select any user by clicking their name and then select **Registrations** from the sections menu to open the enrollments page for the user.



Access Codes

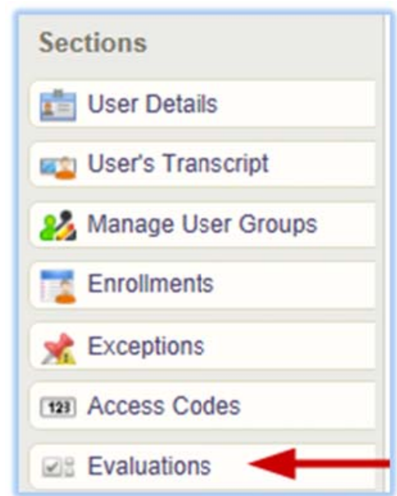
To see a list of access codes any access codes that have been used either by the user or by a manager on the user's behalf, select any user by clicking their name to access the Sections menu and click Access Codes. The column called access code indicates the name of the access code and column called 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.



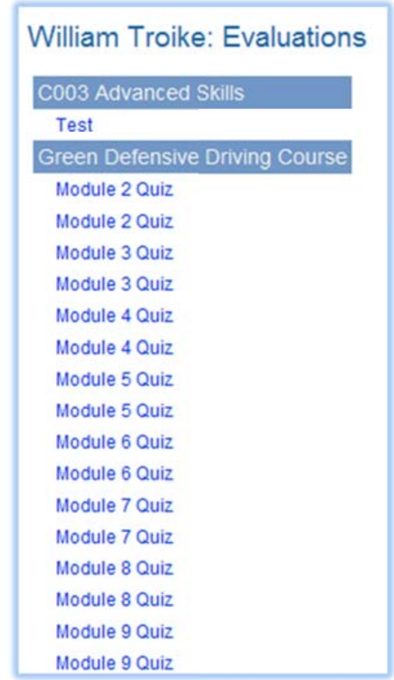


Evaluations

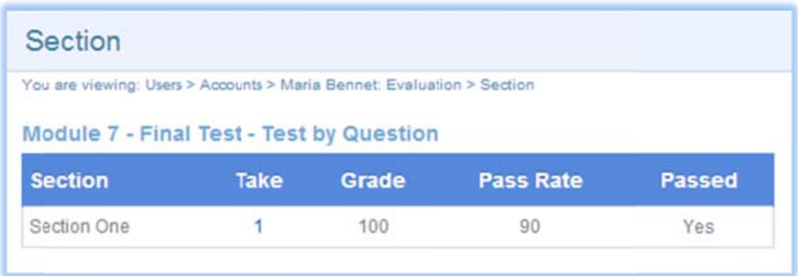
Evaluations are testing assets built within Informetica used to test a participant's knowledge of the content that is provided, collect feedback about a product or an instructor or used as practice exercises. There are 7 different types of questions that can be used to create an evaluation: essay, fill 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.



Section	Take	Grade	Pass Rate	Passed
Section One	1	100	90	Yes

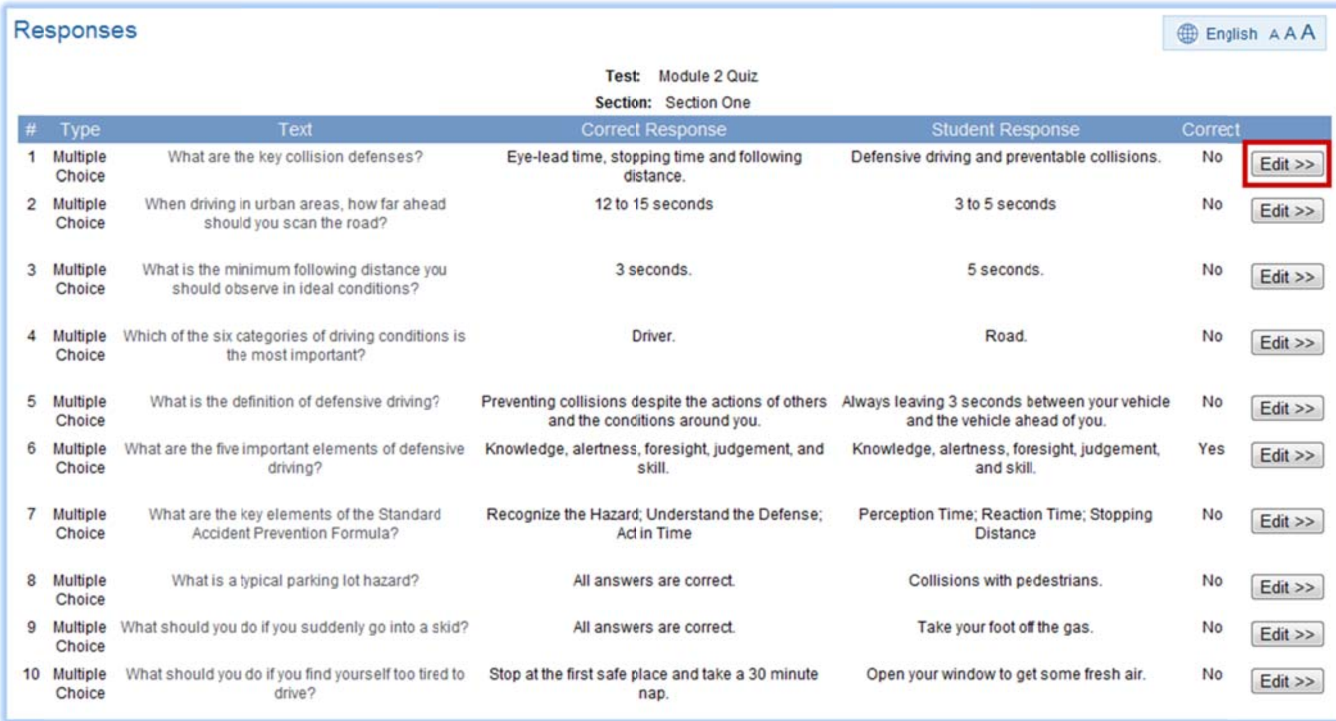
- **Section Take** indicates which section of the evaluation was attempted and how many times the user attempted the evaluation.
- **Grade** indicates the score or grade the user received for each attempt of the evaluation.
- **Passed** indicates whether or not the user passed the evaluation.

Override Evaluation Answers

This feature is available to Site Managers, Campus Admins, and Campus Managers, depending on system configuration.

Managers can override specific answers on an classic evaluations (not yet available for Prova) 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.

Section	Take	Grade
Section One	1	100



Responses

English A A A

Test: Module 2 Quiz

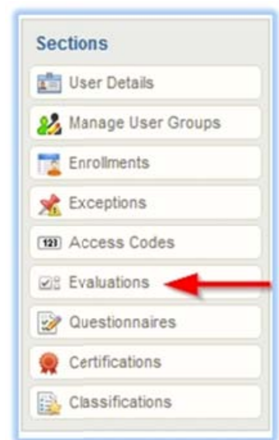
Section: Section One

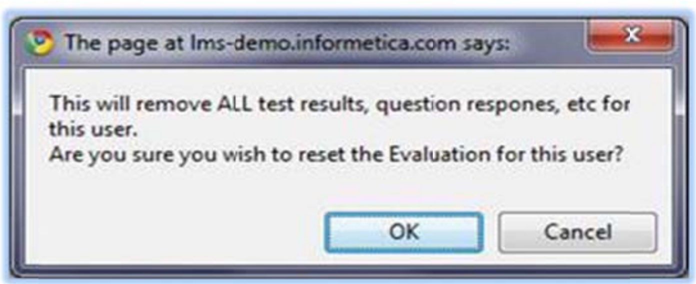
#	Type	Text	Correct Response	Student Response	Correct	
1	Multiple Choice	What are the key collision defenses?	Eye-lead time, stopping time and following distance.	Defensive driving and preventable collisions.	No	Edit >>
2	Multiple Choice	When driving in urban areas, how far ahead should you scan the road?	12 to 15 seconds	3 to 5 seconds	No	Edit >>
3	Multiple Choice	What is the minimum following distance you should observe in ideal conditions?	3 seconds.	5 seconds.	No	Edit >>
4	Multiple Choice	Which of the six categories of driving conditions is the most important?	Driver.	Road.	No	Edit >>
5	Multiple Choice	What is the definition of defensive driving?	Preventing collisions despite the actions of others and the conditions around you.	Always leaving 3 seconds between your vehicle and the vehicle ahead of you.	No	Edit >>
6	Multiple Choice	What are the five important elements of defensive driving?	Knowledge, alertness, foresight, judgement, and skill.	Knowledge, alertness, foresight, judgement, and skill.	Yes	Edit >>
7	Multiple Choice	What are the key elements of the Standard Accident Prevention Formula?	Recognize the Hazard; Understand the Defense; Act in Time	Perception Time; Reaction Time; Stopping Distance	No	Edit >>
8	Multiple Choice	What is a typical parking lot hazard?	All answers are correct.	Collisions with pedestrians.	No	Edit >>
9	Multiple Choice	What should you do if you suddenly go into a skid?	All answers are correct.	Take your foot off the gas.	No	Edit >>
10	Multiple Choice	What should you do if you find yourself too tired to drive?	Stop at the first safe place and take a 30 minute nap.	Open your window to get some fresh air.	No	Edit >>

Resetting an Evaluation

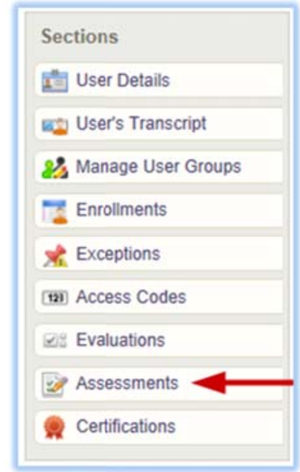
This feature is available to Site Managers, Campus Admins, and Campus Managers, depending on system configuration.

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.





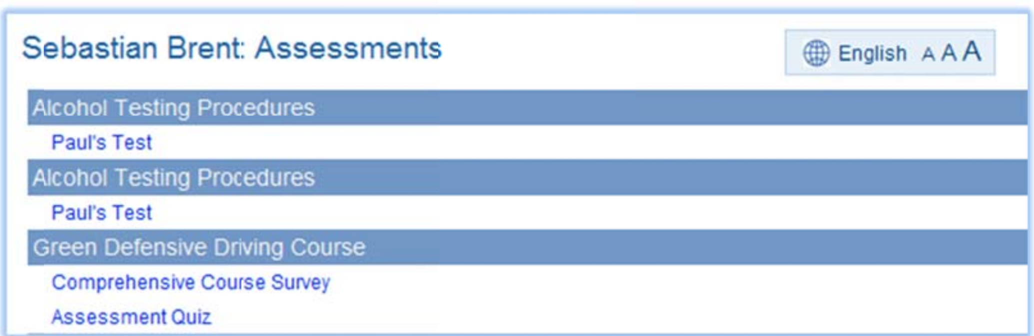
Assessments

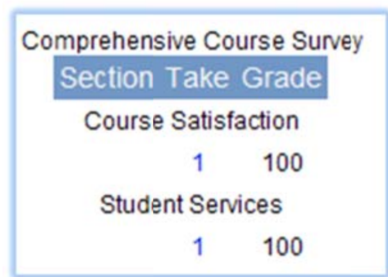


Assessments are an informal way to measure something about your participant by posing content where there is no right or wrong answer. Assessments are often an objective way to measure things like professional strengths and weaknesses, time management abilities, goals or aptitudes. Assessments can also 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:

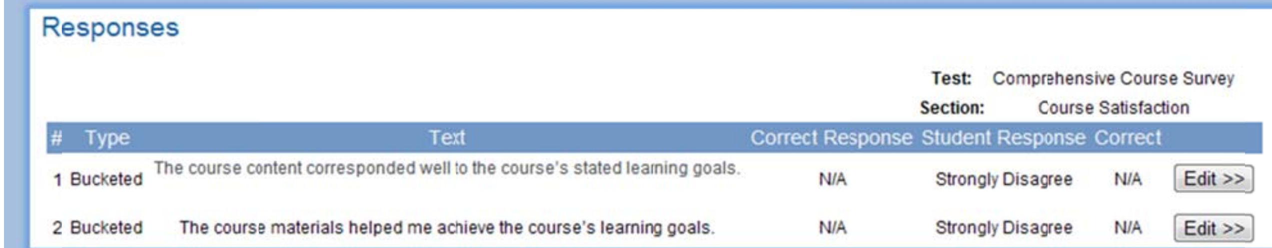
- Which of their employees are taking the assessment and how many times they attempted the it,
- The date of employees' last completion,

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.





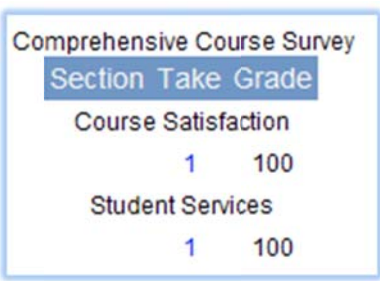
Brief description of the fields

Field	Description
Section Take	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. 
Grade	Indidcates the weight or score the user received for each bucket within the assessment.

Override Questionnaire Answers

This feature is available to Site Managers, Campus Admins, and Campus Managers., depending on system configuration

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.



Responses

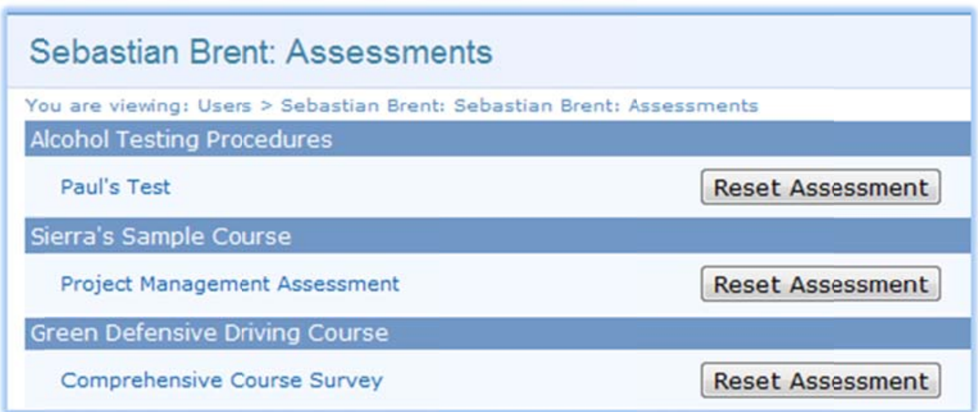
Test: Comprehensive Course Survey
Section: Course Satisfaction

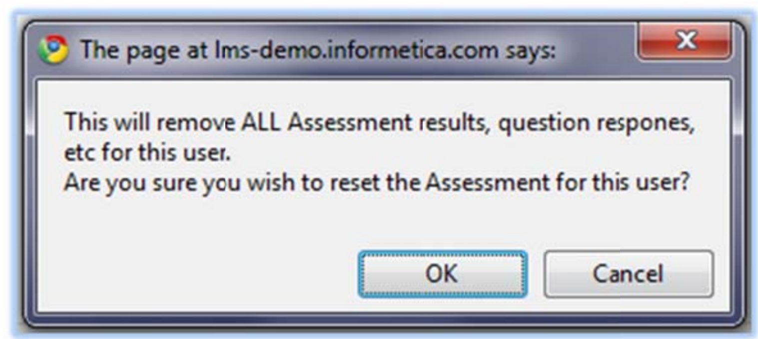
#	Type	Text	Correct Response	Student Response	Correct	
1	Bucketed	The course content corresponded well to the course's stated learning goals.	N/A	Strongly Disagree	N/A	Edit >>
2	Bucketed	The course materials helped me achieve the course's learning goals.	N/A	Strongly Disagree	N/A	Edit >>
3	Bucketed	The way the course was organized facilitated my achieving its learning goals.	N/A	Strongly Disagree	N/A	Edit >>
4	Bucketed	The course content was applicable to my own goals for taking the course.	N/A	Strongly Disagree	N/A	Edit >>
5	Bucketed	The course was intellectually challenging.	N/A	Strongly Disagree	N/A	Edit >>
6	Bucketed	I recommend that this course continue to be offered in the future.	N/A	Strongly Disagree	N/A	Edit >>

Resetting a Questionnaire

This feature is available to Site Managers, Campus Admins, and Campus Managers, depending on system configuration.

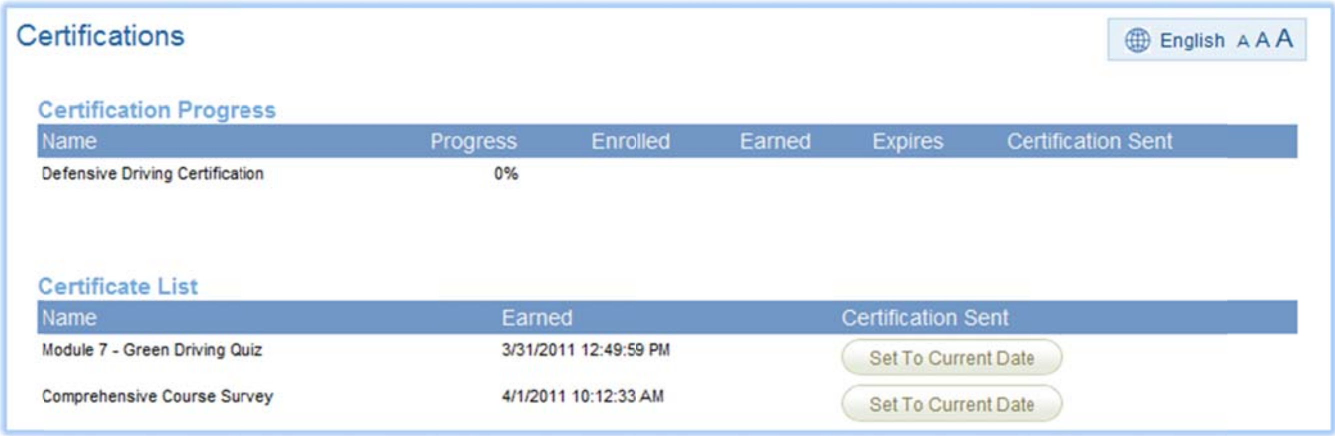
A site manager can reset any assessment for a user. Doing so will remove all previous answers and the user will be required to start the assessment over. The system will ask you to confirm before resetting the assessment.

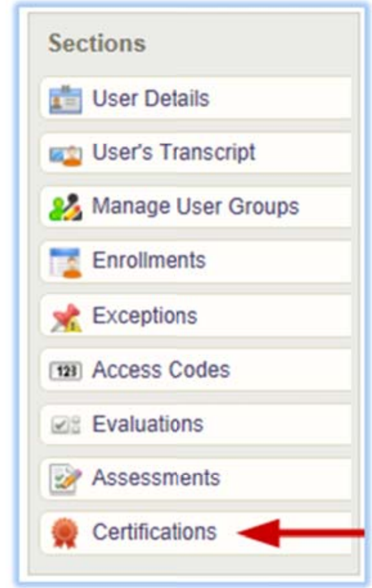




Certifications

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.

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.

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.

5. Managing Enrollments

Topics Covered in this Chapter

Enrolment Methods

There are several methods to enrol users. This chapter covers manual enrollments in Informetica.

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

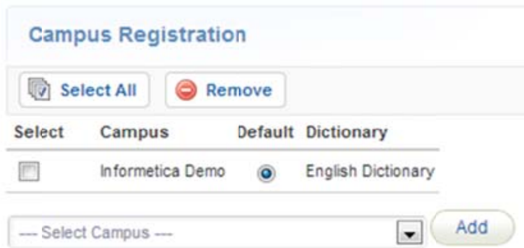
See the Importing Data chapter for instructions on using the import tool for enrollments.

See your own internal documentation for SSO registrations and enrollments.

5.1 Campus Enrollments

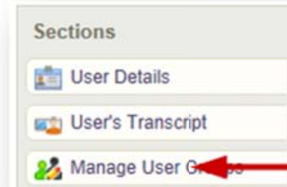
This feature is available to Site Managers, Campus Admins, and Campus Managers, depending on system configuration.

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

5.2 User Group Enrollments

5.2.1 Managing Groups for One User



To manage the user groups a user belongs to:

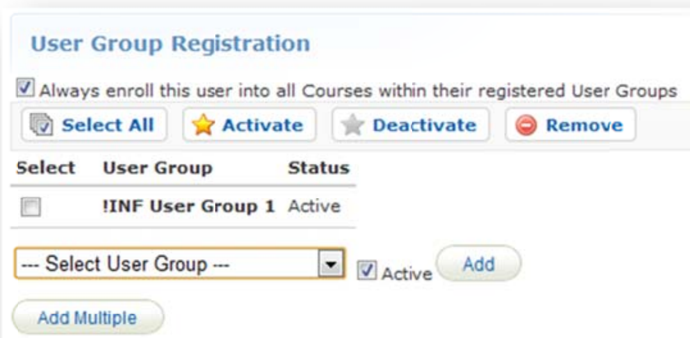
- Site manager: open the user's profile and then select Registration from the Sections menu.
- Campus admin or campus manager: open the user's profile and then select Manage User Groups from the sections menu.

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.

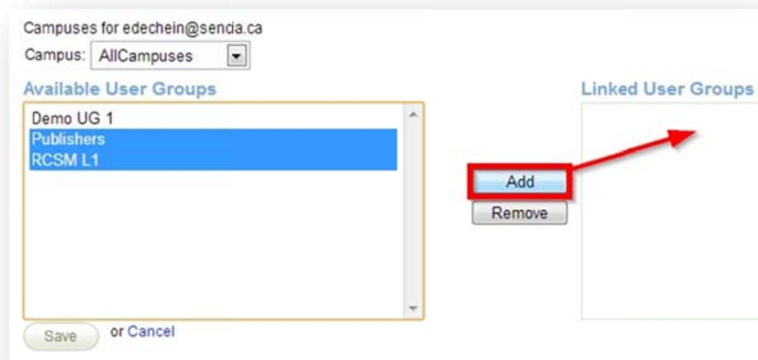
Save button and user will belong to the user groups you moved over to the Linked User Groups box.

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.

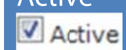
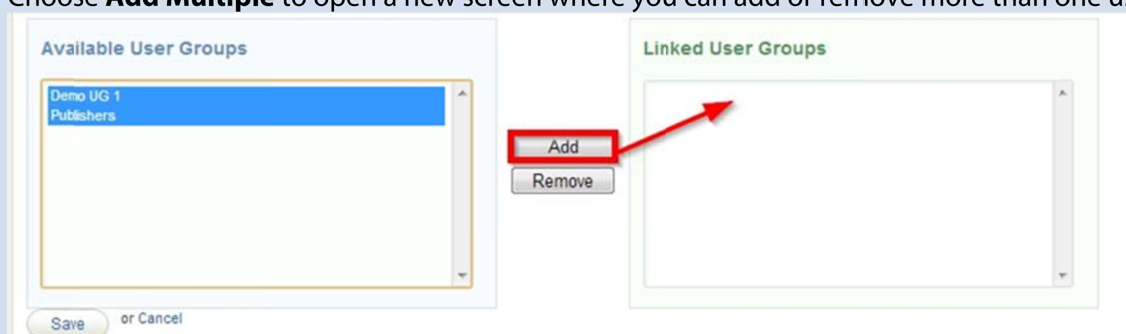
Site Manager view



Campus Admin / Campus Manager view



A brief description of the Site Manager fields:

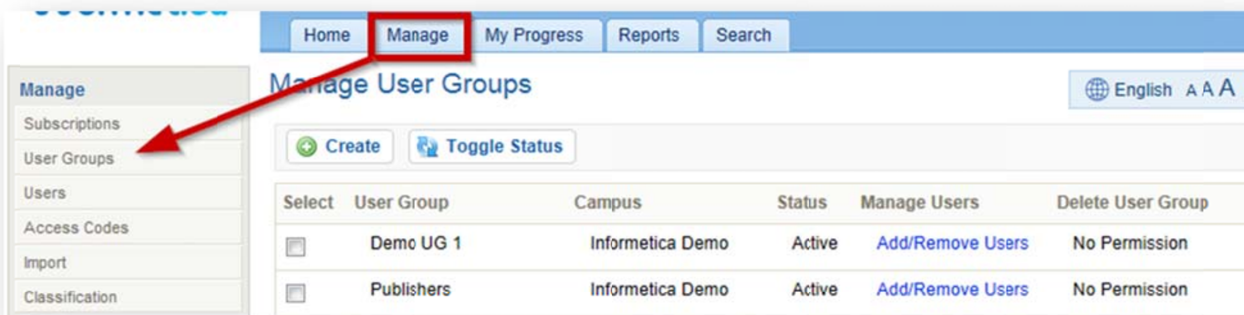
Filter Option	Description
Always enroll this user into all courses within their registered user group	This option is only seen by configurations where users have automatic access to every course in their user groups. It is enabled by default. Uncheck to disable the feature. Users with this function disabled 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. 

5.2.2 Managing Groups for Multiple Users

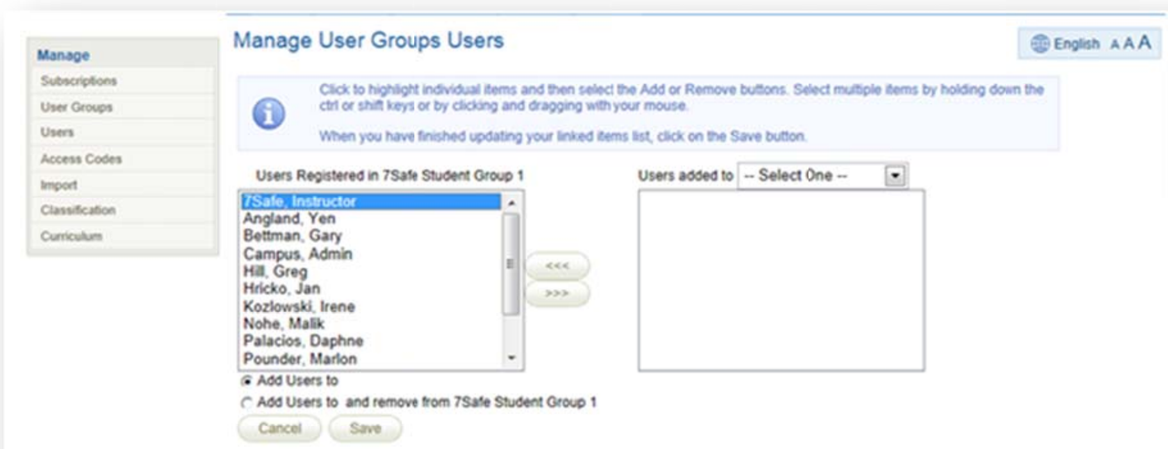
There are various methods to enroll users en masse to one more user groups in the system.

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.

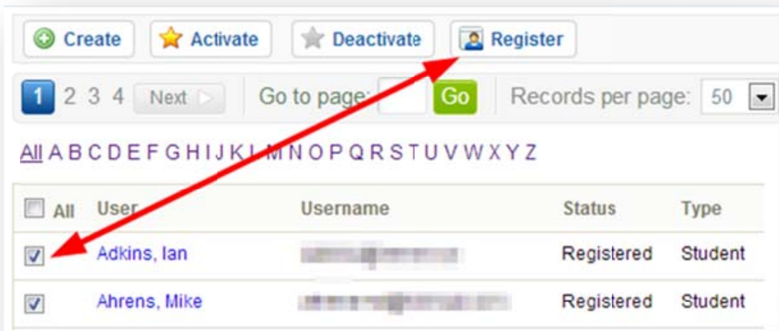


Before you **save**, select the correct option:

- 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.



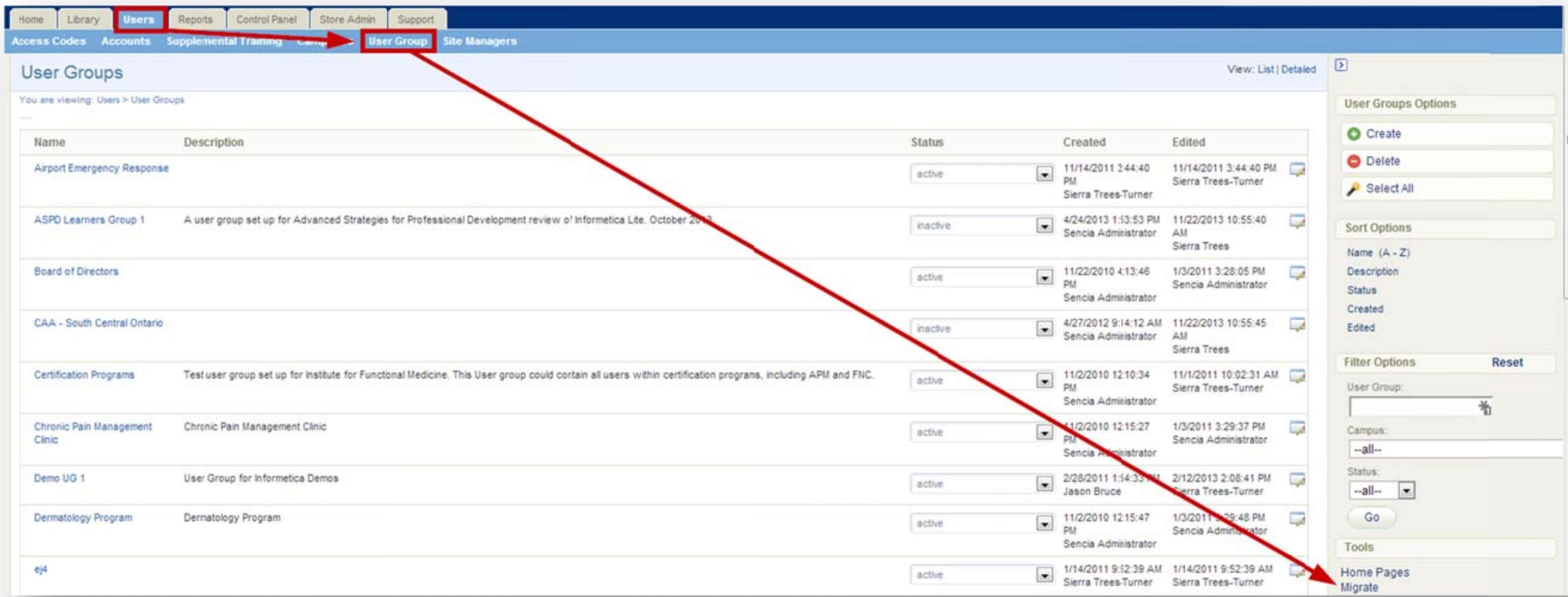
Excel Upload

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.

5.2.3 User Group Migration Tool

This feature 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.

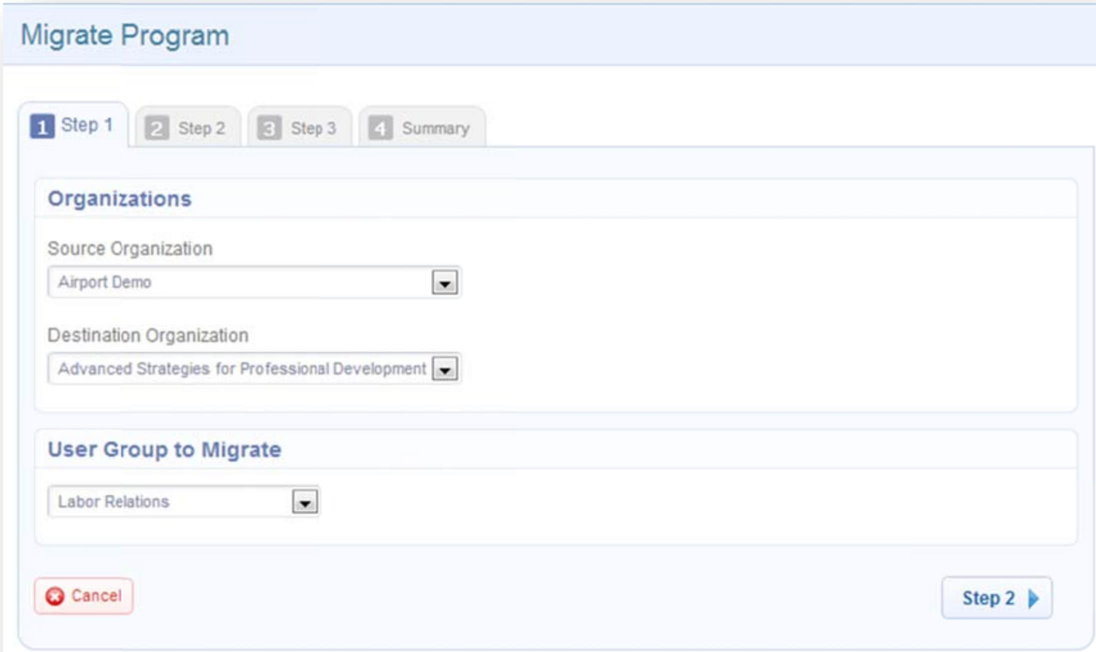


Step 1: Choose the Migration Options

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

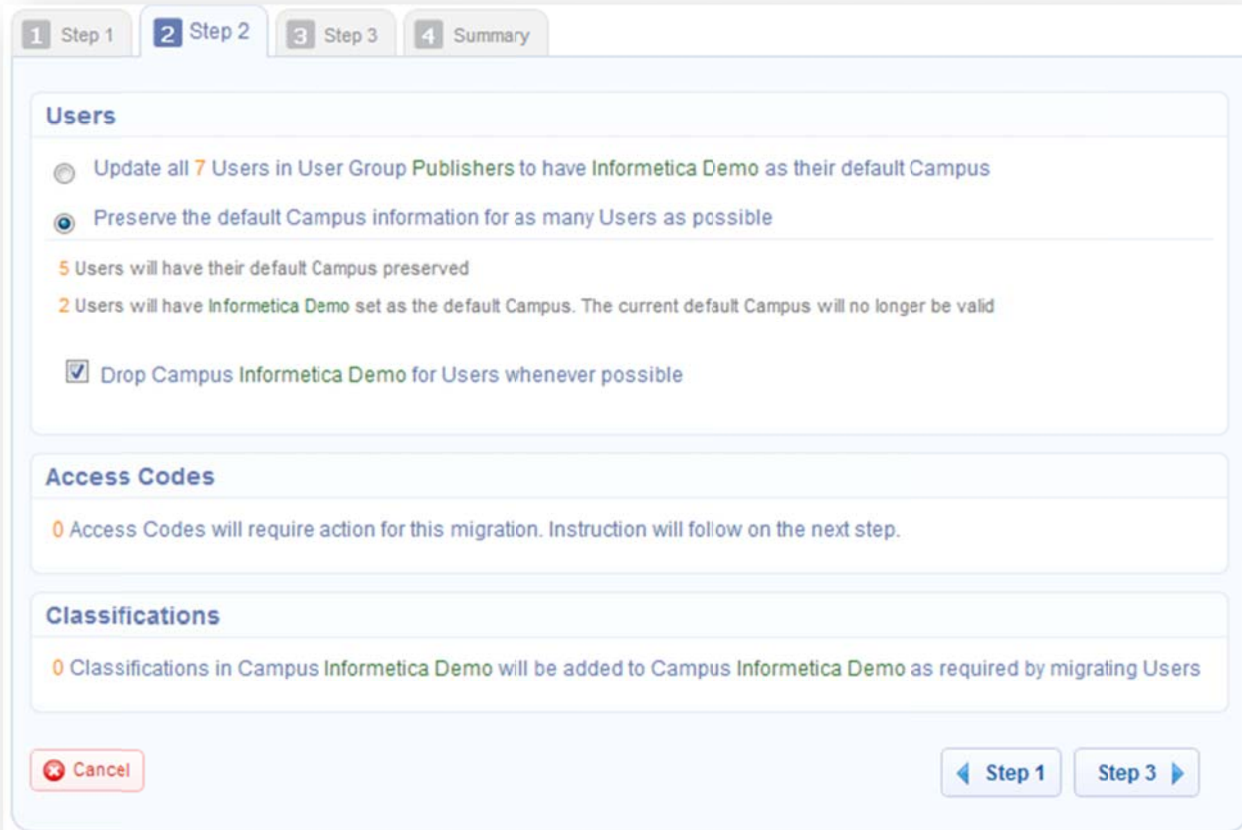


Step 2: Make decisions on the Users Default Organization

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

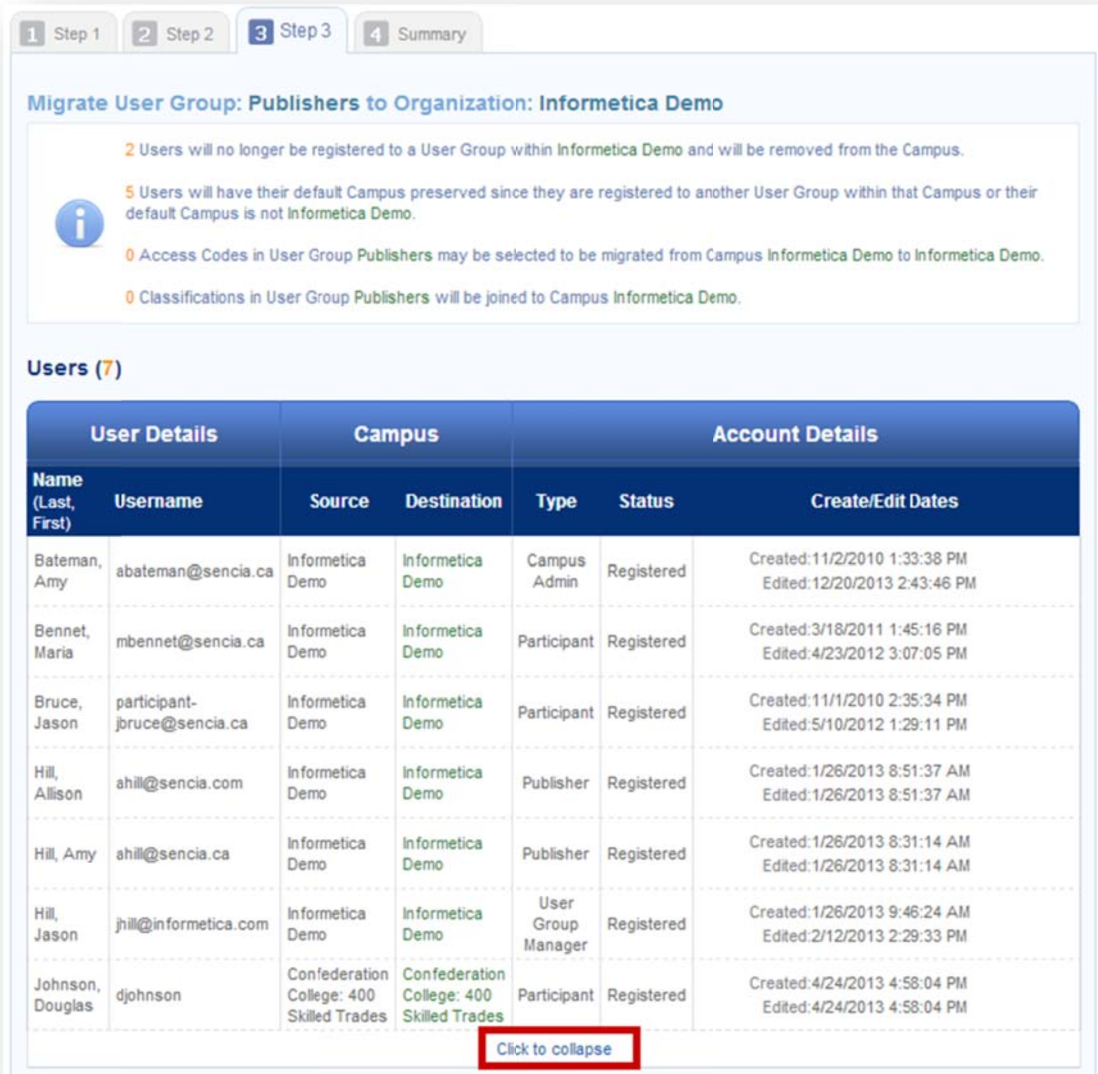
user accounts whenever possible by selecting Drop Campus.



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

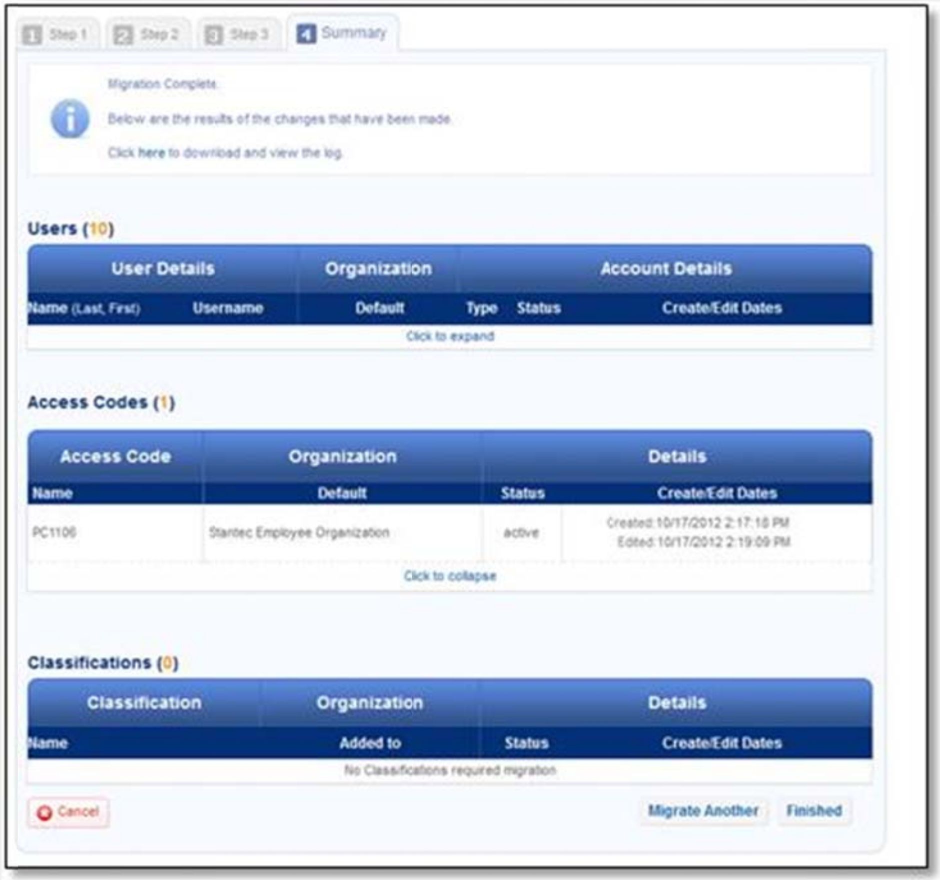
- Expand the users to see what changes will or will not be made to users' default organizations



- 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.

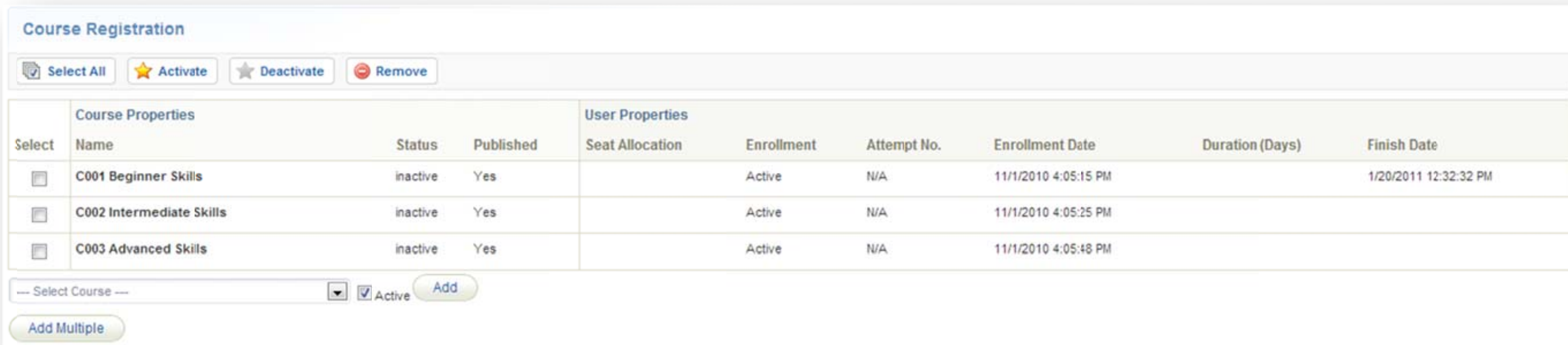


5.4 Manual Product Enrollments

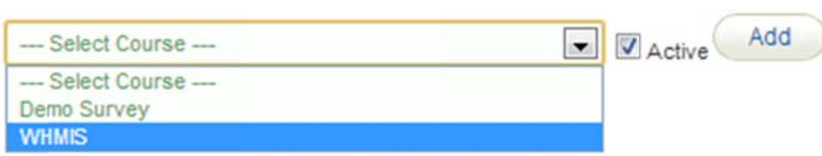
5.4.1 Enrollment via User Profile

This feature is available to 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.

Multiple Products Types

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

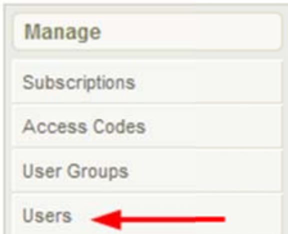
5.4.2 Enrollments Using Access Codes

This feature is available to Site Managers, Campus Admins, and Campus Managers, depending on system configuration.

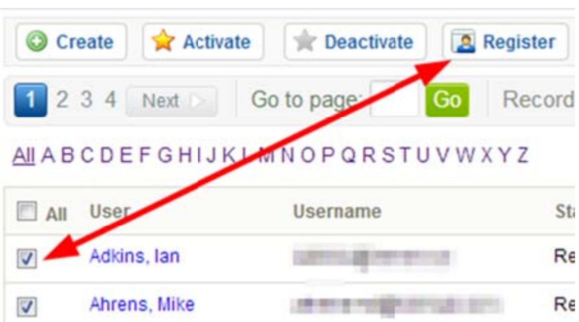
Campus Admins/Managers enroll individual users to products via access codes. Site Managers can use this method to enroll one or more users.

Campus Admins and Campus Managers:

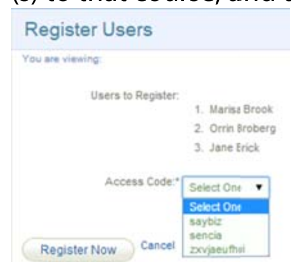
1. Click the **Manage** tab, and then click **Users** on the manage menu on the left.



2. Check 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 (s) to that course, and then select **Register Now**.



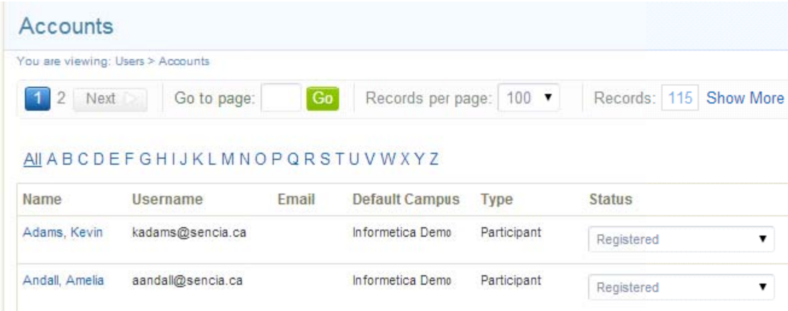
4. A summary screen will confirm the enrolments and you can opt to automatically send the users an enrolment email.

Make Sure You Have Access Codes Available

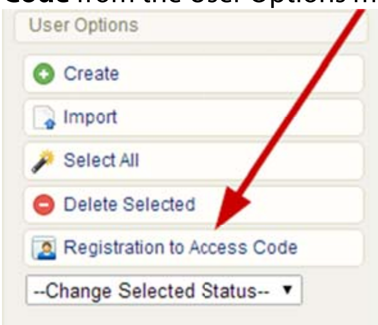
Campus Admins/Managers must have access codes made available before they can enrol users to a product. Visit the Access Codes and Subscriptions chapter of this manual for more information.

Site Managers

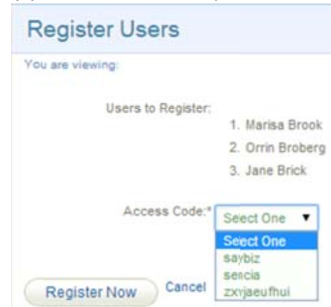
1. **Click the** Users **tab, and then click** Accounts**.**



2. Select one or more users, and then click **Registration to Access Code** from the User Options menu on the right.



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



4. 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.

5.4.3 Multiple User Enrollments via Import

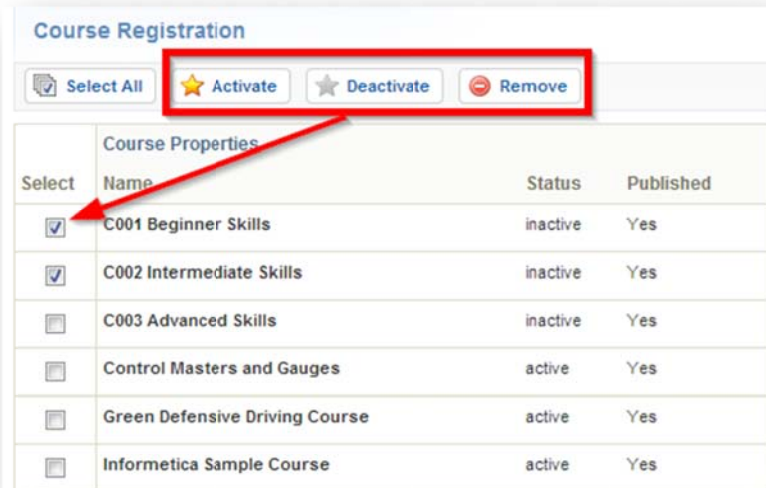
This feature is available to Site Managers, Campus Admins, and Campus Managers, depending on system configuration.

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.

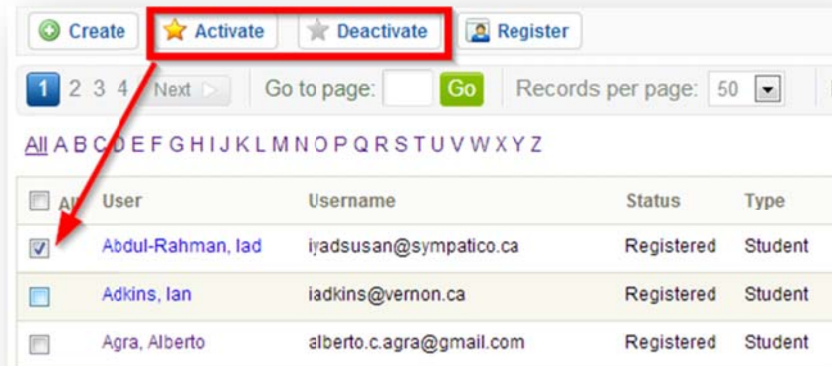
5.4.4 Activate, Deactivate, or Remove an Enrollment

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



Multiple Product Types

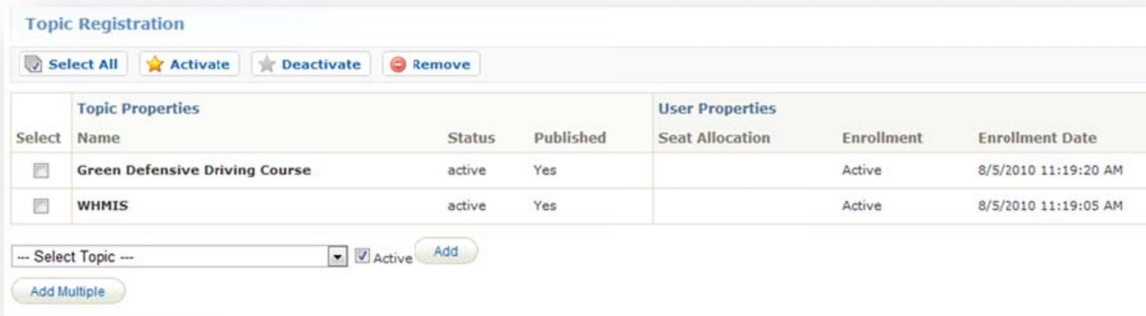
Note that your site's configuration may use multiple product types. Each product type has its own registration area and selection boxes.

5.4.5 Product Disenrollments

5.4.5.1 Individual Disenrollments

This feature 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".



Multiple Product Types

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

5.4.5.2 Multiple Deactivations

This feature is available to Site Managers, Campus Admins, and Campus Managers, depending on system configuration.

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.

Import Tool

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.

6. User Groups

Topics Covered in this Chapter

6.1 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.

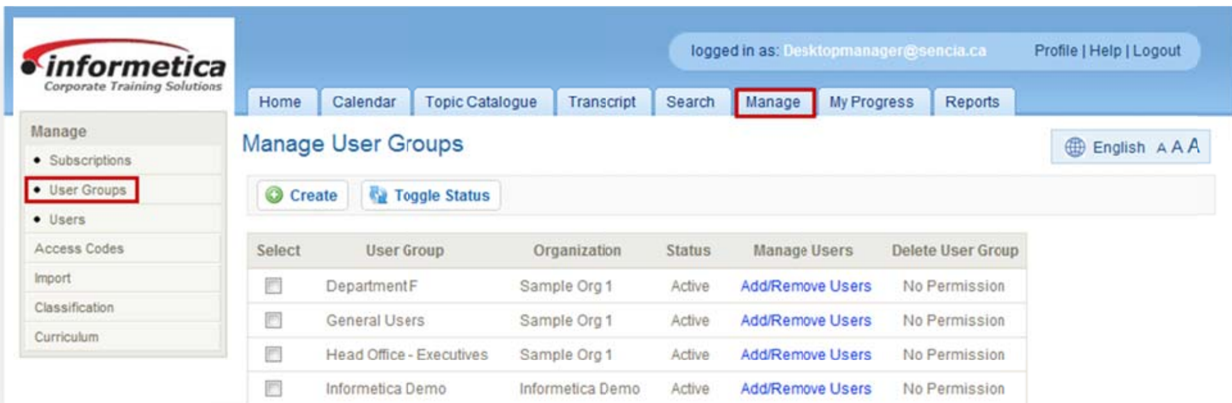
6.2 The Manage Users Groups Page

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.

6.2.1.1 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.

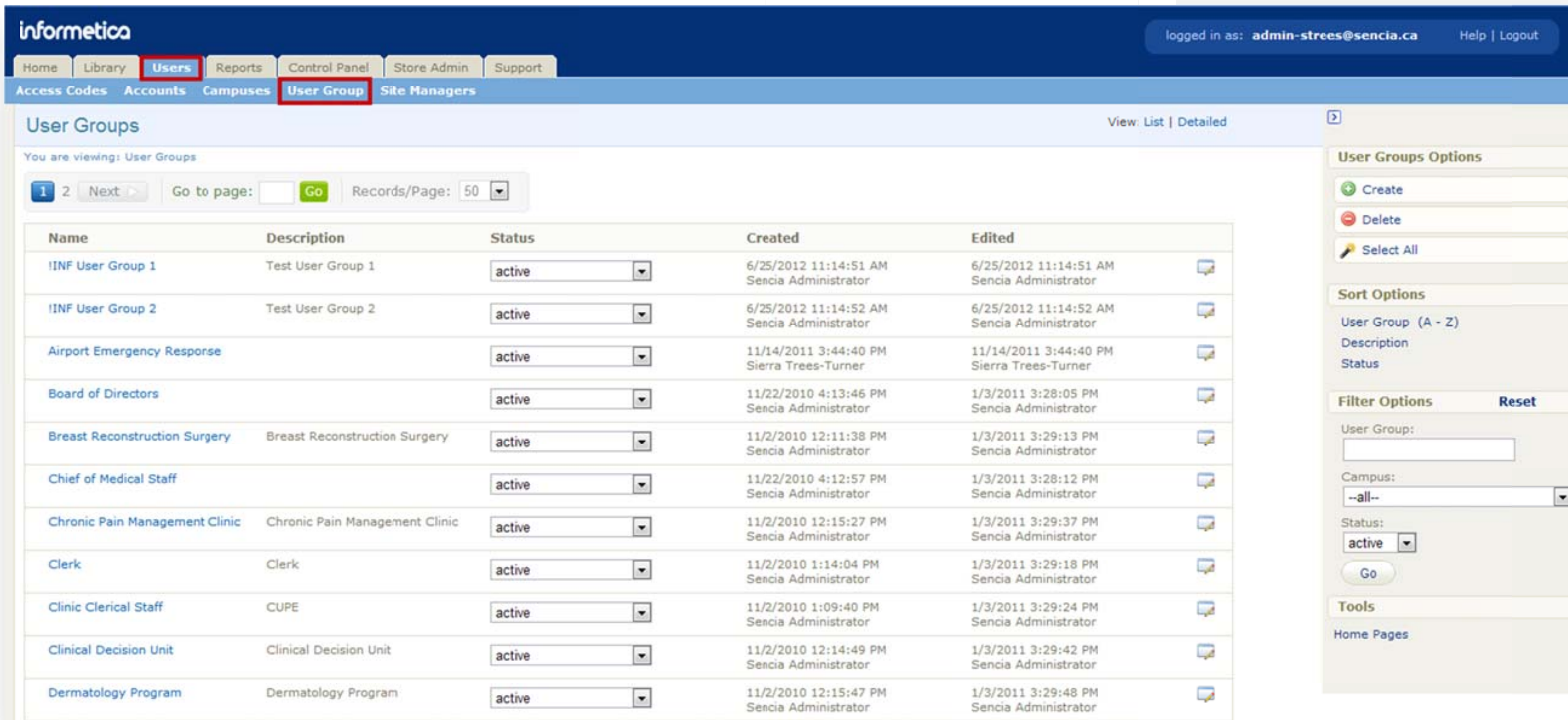
Desktop and Organization Manager View



6.2.1.2 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



6.3 Sort and Filter User Groups

This feature is available 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

6.4 Create a User Group

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

Step 1

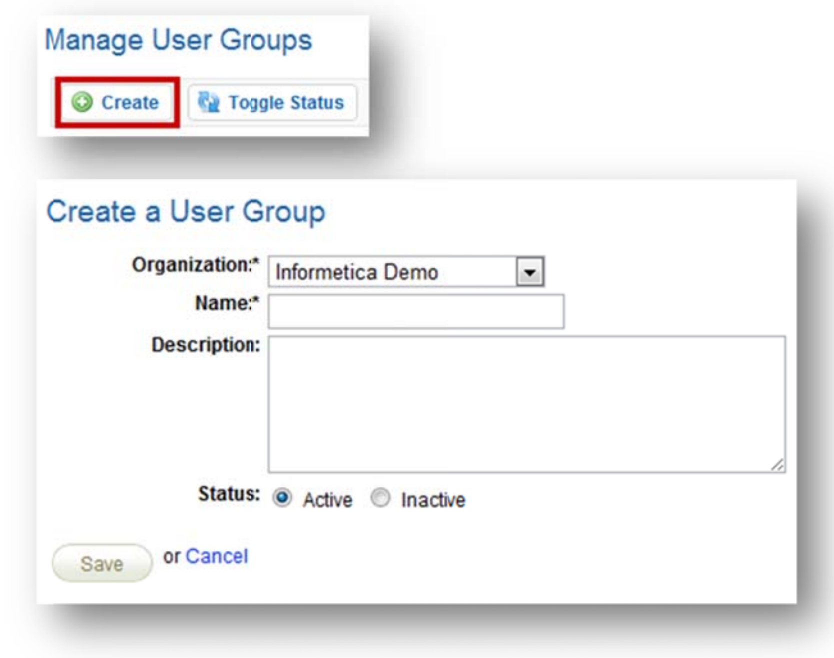
- Add the user group to any certifications and check for eligible users, if necessary

Step 2

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

For Desktop and Organization Managers

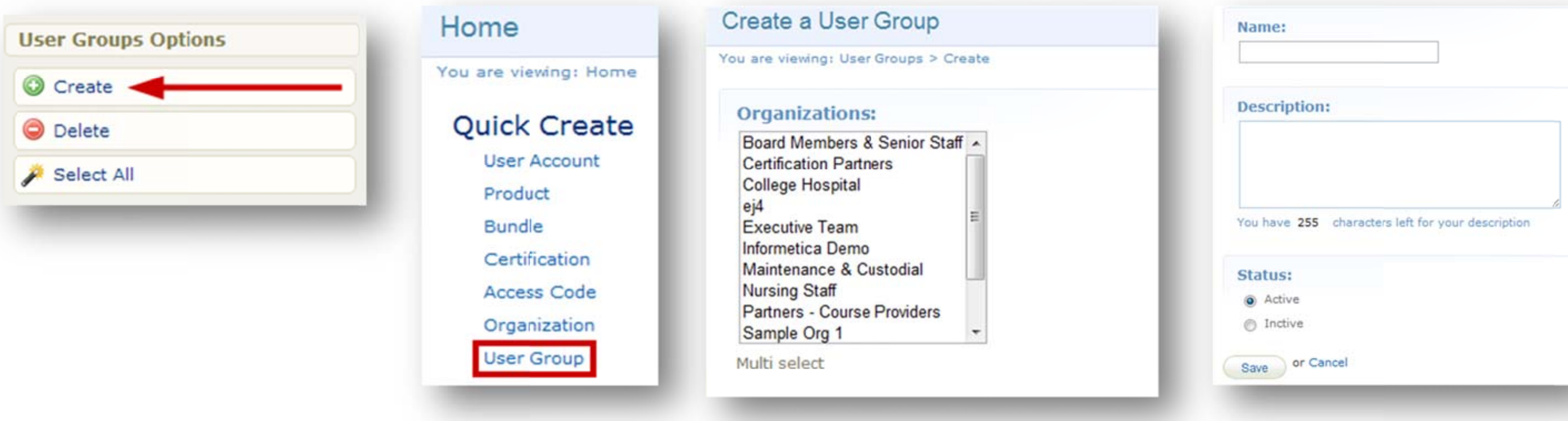
From the manage user groups page, click on the create button near the top of the page to open the Create a User Group screen. Enter the information onto each field and then save. Below is a brief description of the fields:



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.



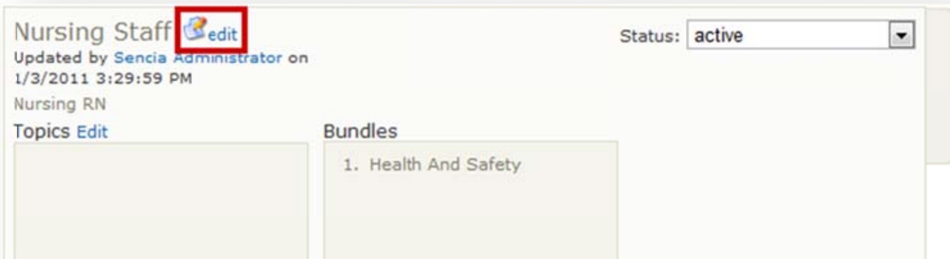
Below is a brief description of the fields:

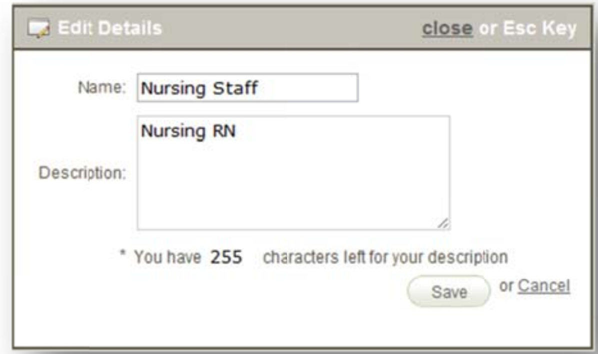
Field	Description	Input
Organization	Select one or more organizations to link the new user group to. This can always be changed later. Click the mouse with the CTRL button held down to select more than one organization.	Required
Name	Enter a name for the user group.	Required
Description	Enter a description 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

6.5 Edit User Group Details

This feature is available 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.

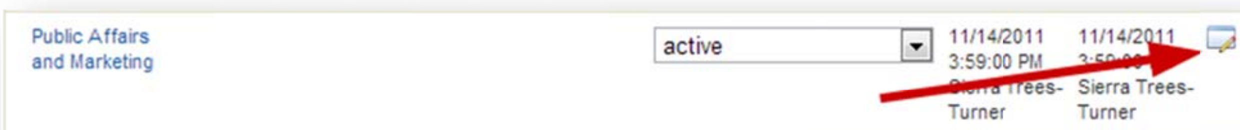




6.6 Edit User Group Products

This feature is available to Site Managers.

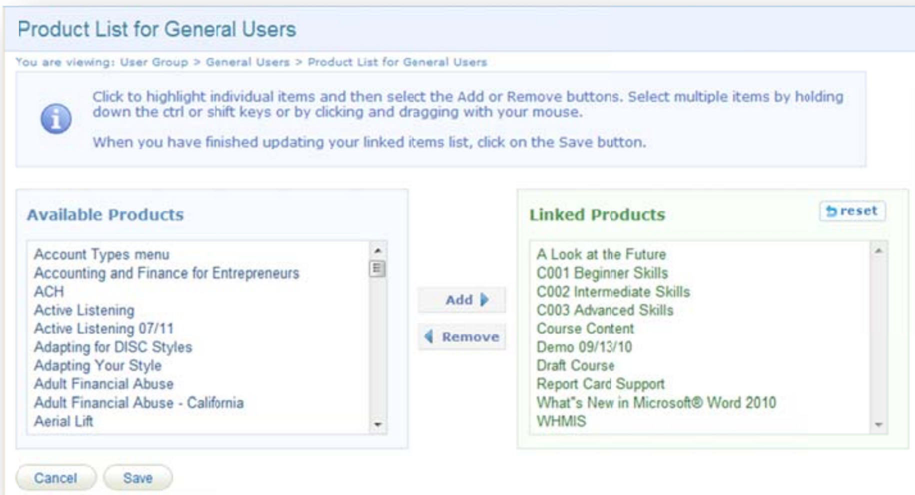
From detailed view, click on the product's edit link in the user group's information box, or, from list view, click on the edit button. This will open the product list page for the user group where you can link specific products to the user group.



Import Tool

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.



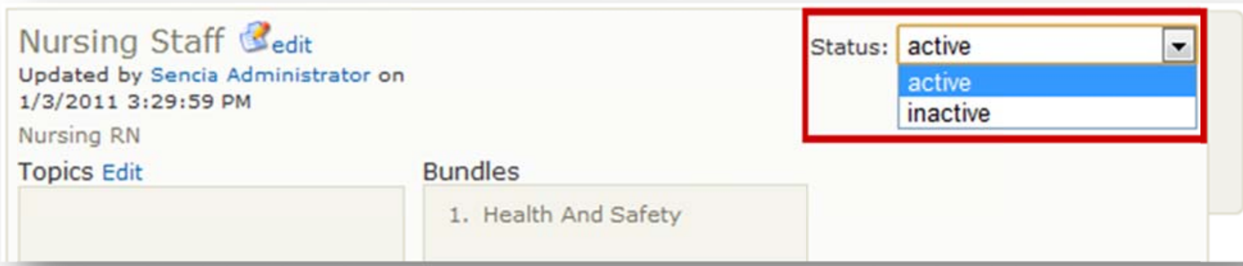
6.7 Activate/Deactivate a User Group

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.

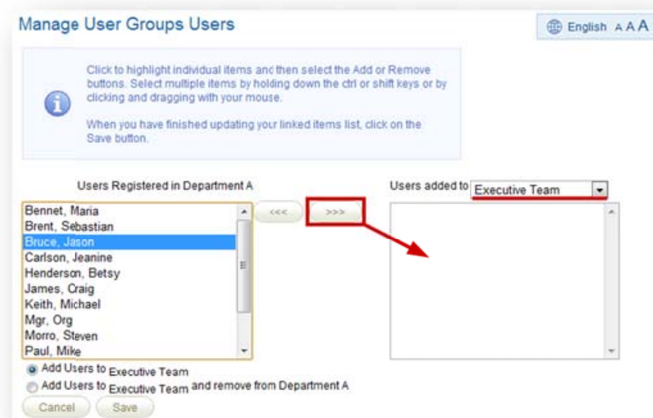


6.8 Add or Remove Users from User Groups

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.

6.8.1 Add Users to a User Group

This feature is available to Campus Admins and Campus Managers., depending on system configuration.



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.

6.8.2 Remove Users from a User Group

This feature is available to Campus Admins and Campus Managers., depending on system configuration.

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”.

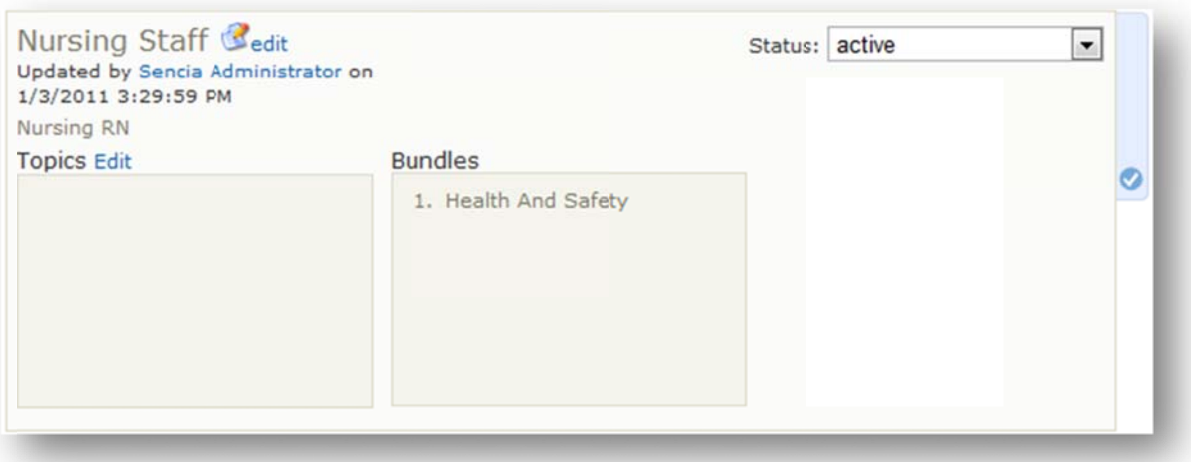
Click the button with three arrow heads facing to the right 

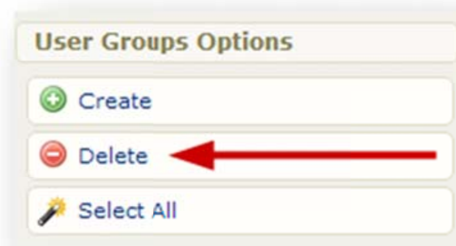
to move the user names over to the “Users added to Executive Team” box. If you changed your mind or accidentally selected the wrong user, you can select the user name from the “Users added to Executive Team” box and click the button with three arrow head saving left 

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.

6.9 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.





7. Create and Edit Home Pages

Topics Covered in this Chapter

7.1 NAVIGATE TO HOME PAGES

7.2 CREATE A HOME PAGE

7.3 EDIT HOME PAGES

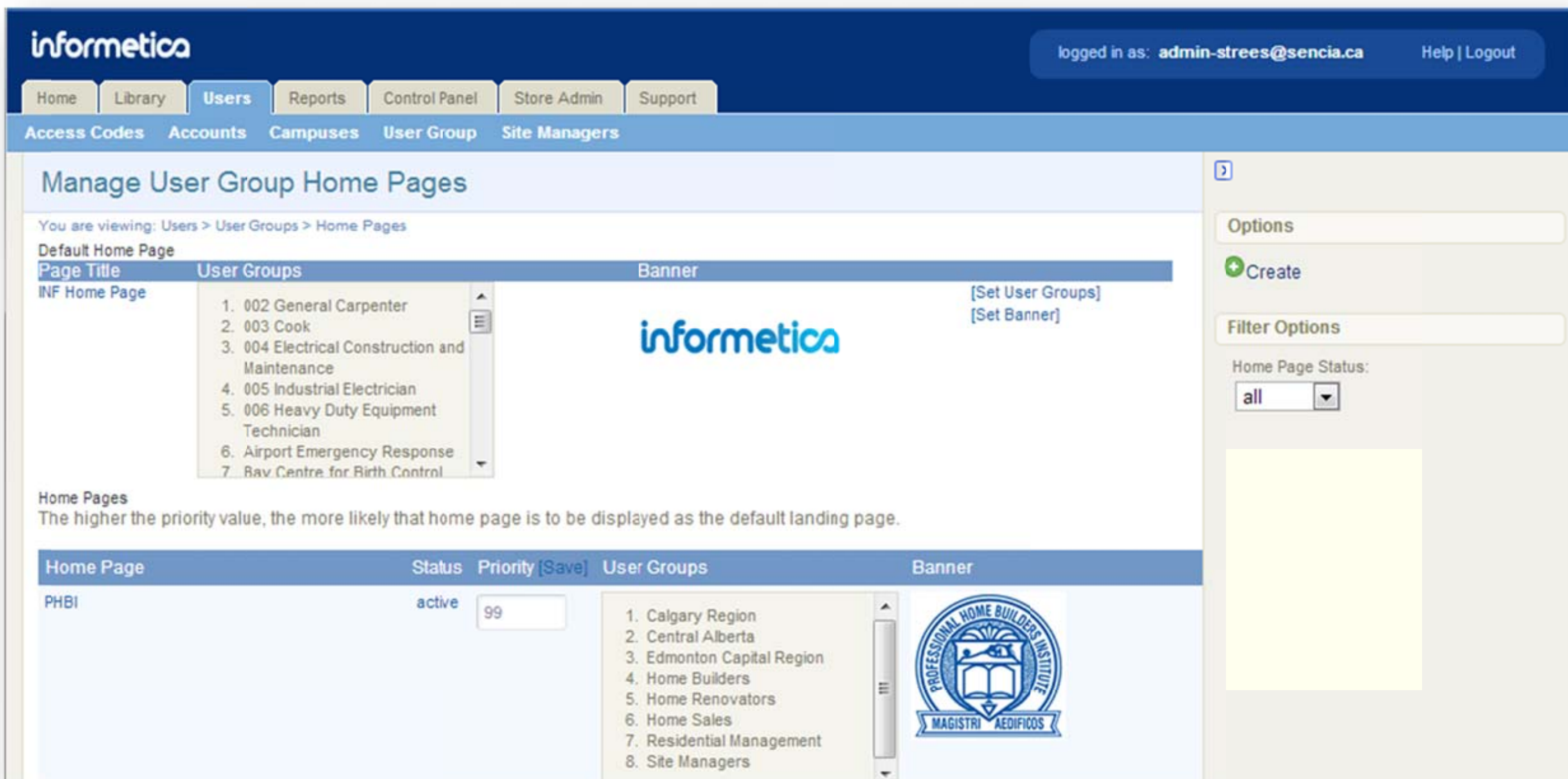
Campus Admins and Publishers
Site Managers

7.4 ADD OR REMOVE USER GROUPS

7.5 SET BANNER

7.6 CHANGE PAGE PRIORITY

7.7 DELETE HOME PAGES



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 transcripts, training progress and more. The manage user group home pages screen allows you to edit which home page users see. You can have one default home page for everyone or you can create new home pages based on user group. Users with access to more than one home page can select which home page they wish to see using a drop down menu after they log in. You can prioritize these pages for the user groups as well.

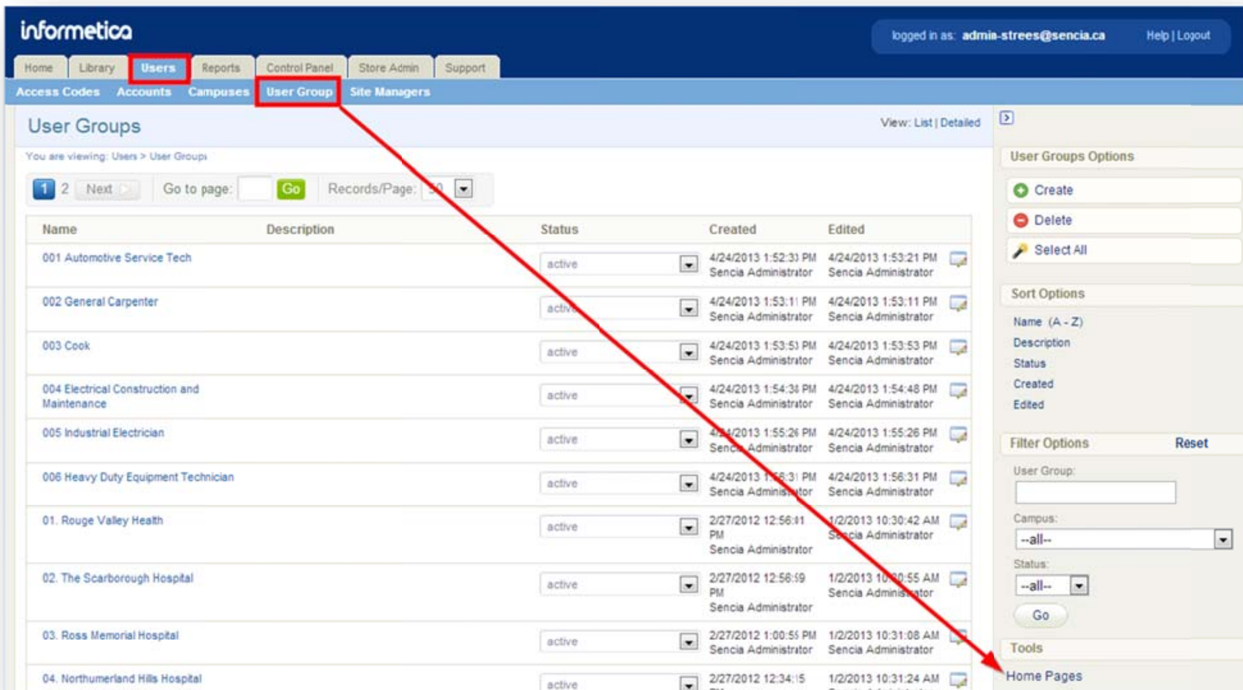
A brief description of the fields

Field	Description
Default Home Page	The only required home page. It is displayed for all User Groups not otherwise assigned a specific home page.
Home Pages	Pages are displayed to users based on the user groups they belong to. A user group may only be assigned single home page.
Home Page	The title of the home page.
Status	Shows whether the home page is active or inactive. Inactive pages are not displayed to users.
Priority	The higher the priority value, the more likely that home page is to be displayed as the default landing page.
User Groups	Displays a list of user groups assigned to a specific home page. A user group may only be assigned to a single home page; however, a user may belong to multiple user groups, giving them access to multiple home pages.
Banner	This shows a preview of the image or logo used as a banner on the home page.
Set Column	Assign user groups to the specific home page, set the banner or delete the home page.

7.1 Navigate to Home Pages

This feature is available to Site Managers.

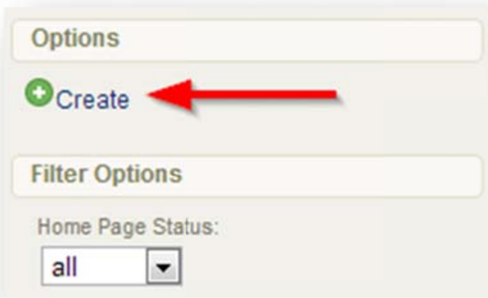
1. Click the **Users** tab
2. Click **User Groups**
3. Click **Home Pages** from the tools menu.

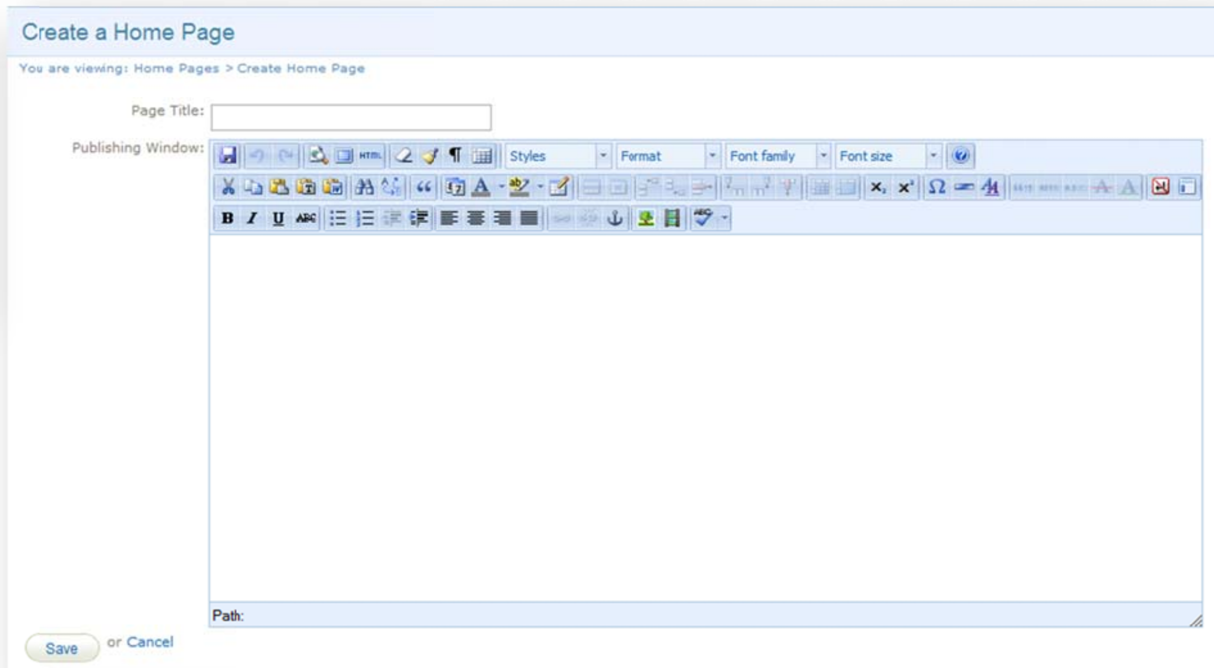


7.2 Create a Home Page

This feature is available to Site Managers.

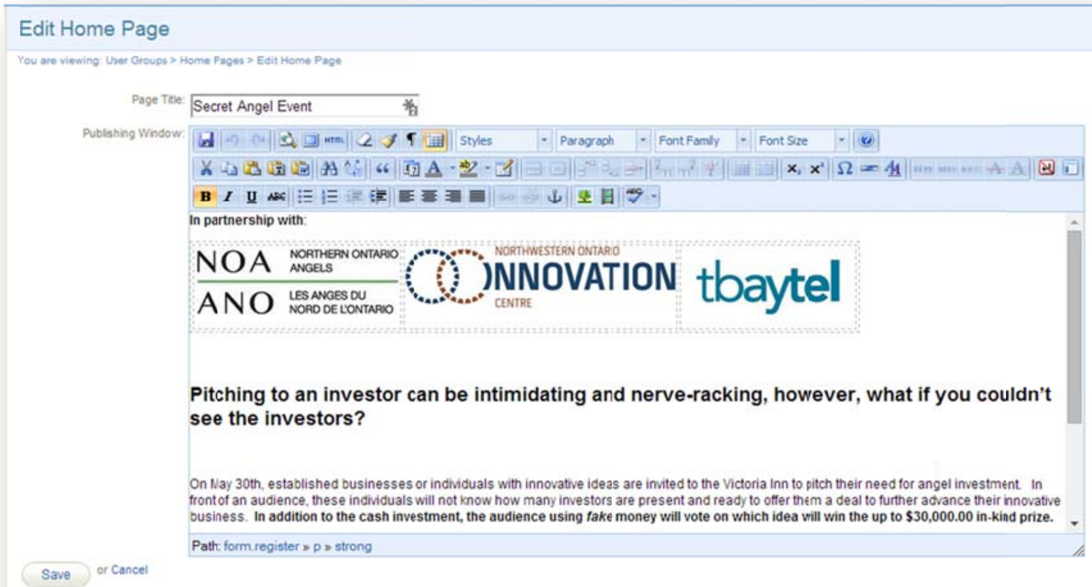
1. Navigate to **Home Pages**
2. Click **Create** from the options menu
3. Enter a **Page Title**
4. Design your home page using the content editor.
5. **Save**





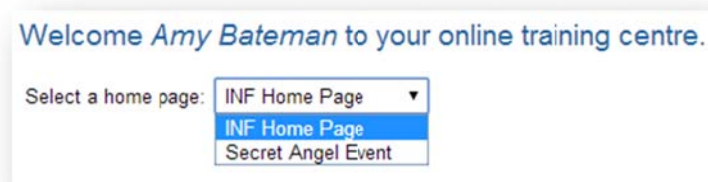
7.3 Edit Home Pages

This feature is available to Site Managers, Campus Admins, and Publishers, depending on system configuration.



Campus Admins and Publishers

Log in and select the **Edit** button at the top of the home page. Use the drop down menu to select a home page if you belong to multiple pages.



Site Managers

1. Navigate to **Home Pages**.
2. Click the name of the home page to open it.
   Hint: Filter to show only active or inactive home page.
3. Make changes using the content editor.
4. **Save**.

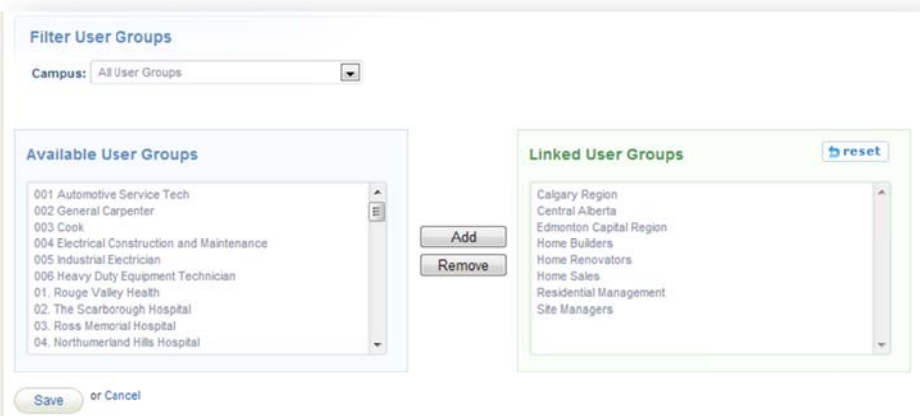
7.4 Add or Remove User Groups

This feature is available to Site Managers.

Assign user groups that will see a specific home page or remove user groups who do not need access.

1. Navigate to **Home Pages**
2. Click **Set User Groups**
3. Select groups to add from **Available User Groups** and then click **Add** to move them to **Linked User Groups.**

4. Select groups to remove from **Linked User Groups** and then click **Remove** to move them to **Available User Groups.** *Hint: filter to show only groups belonging to a specific campus.*



5. **Save**

User Group Assignments

User groups can only belong to one home page at a time. However, users can belong to multiple groups with access to each group's home page.

1. Assigning a user group to a different home page will remove it from the page and relocate it to the new page.

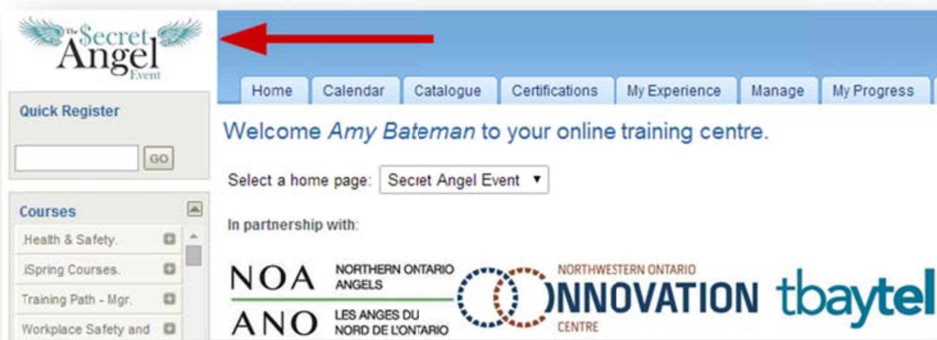
2. User groups removed from a home page are automatically reassigned to the default home page unless reassigned.

7.5 Set Banner

This feature is available to Site Managers.

Site managers can add an optional banner to represent a home page to desktop users (a company or department logo, for example). Click the set banner link in the right from the manage user group home pages screen to open the set banner page. Select an image from the dropdown menu and then click the save button. The image will now appear on the desktop user's home page.

The banner will appear both in the listing of home pages as seen by the Site Manager and on the home page itself. Here is an example as seen by a participant:



Banner Sizes

Desktop banners are configured for an ideal width of 160px and height of 78px. If you select an image that exceeds the maximum restrictions, a copy of that image will be created and resized accordingly. Resized images are saved as a new file with the text "_banner" appended to their original name.

For example, the image "logo.jpg" will be copied, resized, and saved as "logo_banner.jpg".

7.6 Change Page Priority

This feature is available to Site Managers.

From the manage user group home pages screen, you can change the priority value of each home page. The higher the priority value, the more likely that home page is to be displayed as the default landing page for users who belong to many user groups with unique home pages. Change the value next to the active field for any home page and the click save next to priority at the top to save any of the values changed.

7.7 Delete Home Pages

This feature is available to Site Managers.

From the manage user group home pages screen, you can permanently delete any home page. Click the delete home page link on the right next to any home page to delete it.

8. Bundles

This feature is available to Site Managers.

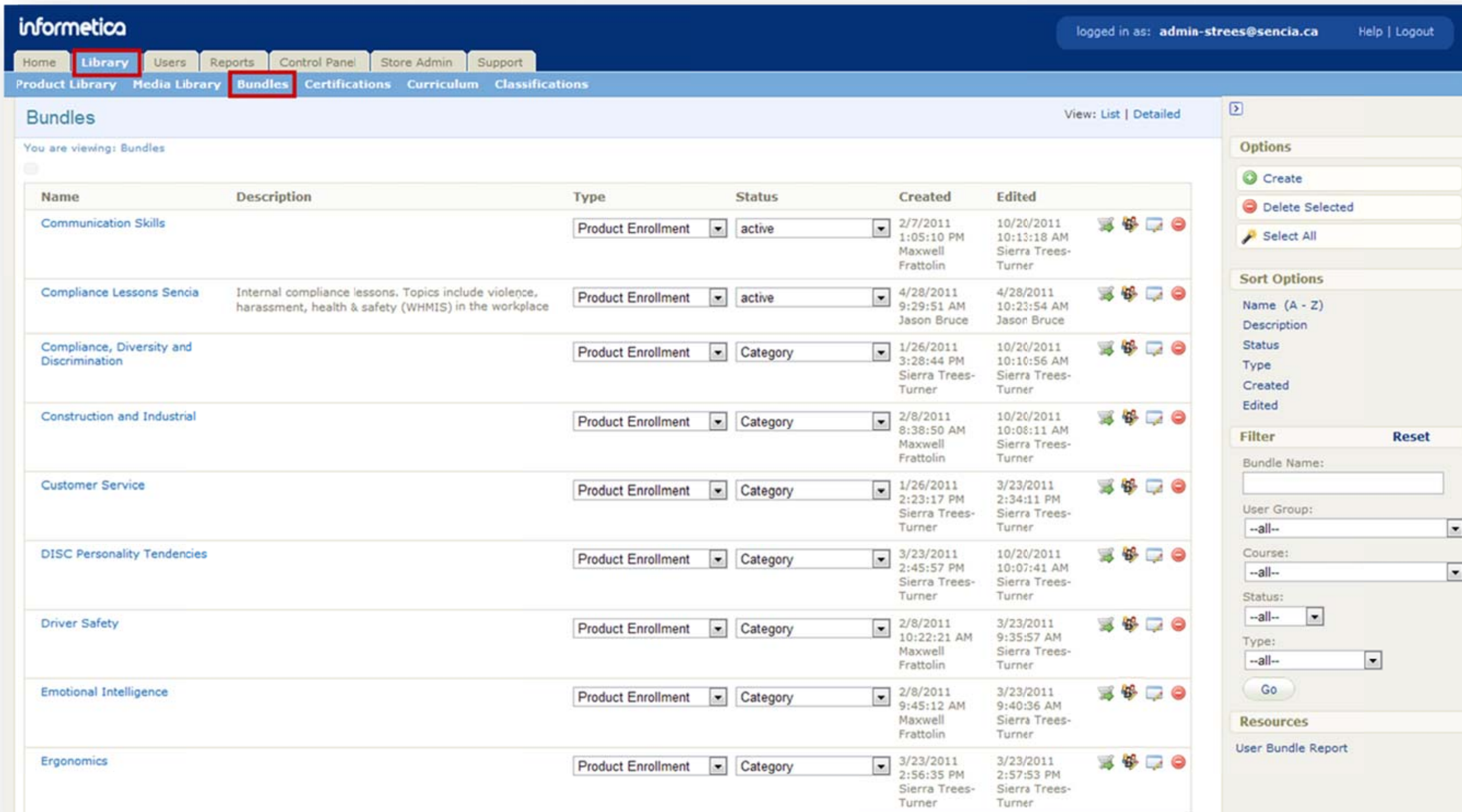
A bundle is used to offer several products together as one combined product. This is often used as a way of simplifying how a participant registers to courses. Informetica offers bundles of products. Bundles may be assigned to one or more user groups and may be assigned to an access code for easy enrolment of training for one or many users. Here are some common ways Informetica clients use bundles:

- Bundle courses and assign that bundle to an access code for quick registration.
- Ensuring users get registered to all of the products of a similar topic or certification needed.
- Bundle courses that are for sale in order to offer a bulk discount.
- Offer users a choice between purchasing the entire bundle or separate courses.

Topics Covered in This Chapter

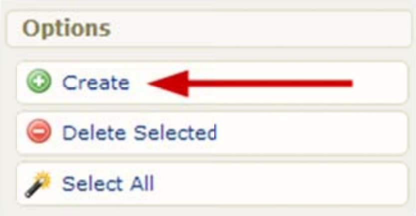
8.1 The Bundles Page

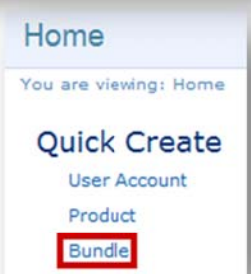
The bundles main page is where you can create, edit or delete bundles. You can also change the type and status of a bundle from here. To navigate to the bundles page, select a click the library tab at the top and then click the bundles link. A list of all of the bundles set up for your site is listed and can be sorted and filtered using options on the right.

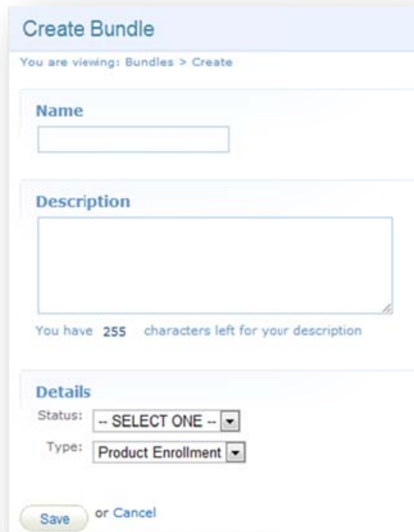


8.2 Create a Bundle or Edit Details

Select **Create** under the options menu on the right. Alternatively you can create a new bundle from the home page under quick create by clicking bundle. Either method will bring you to the create bundle page. To edit these details for an existing bundle, click the name of the bundle from the bundles screen, make the changes and save.



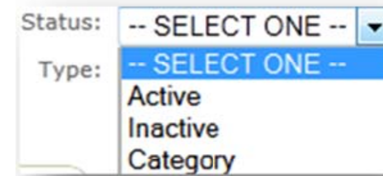




Field	Description	Input
Name	Enter the name of the bundle.	Required
Description	Enter a description for the bundle. The description is not publicly displayed.	Optional
Status	Select active, inactive or category from the dropdown menu.	Required
Type	Select a type from the dropdown menu. You may have only one option listed here.	Required
Save or Cancel	After saving, you will be brought back to the bundles main page.	Required

8.3 Bundle Statuses

Here is a guide to the bundle statues and how they are used.



Active

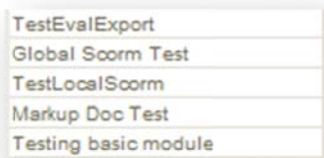
Active status is used when the bundle is intended for registration purposes. For example, a bundle assigned to an access code. When active, the bundle can be seen on the desktop side and in drop down menus for reports.

Inactive

When inactive, the bundle cannot be seen by any desktop users and it will not appear in any dropdowns

Category

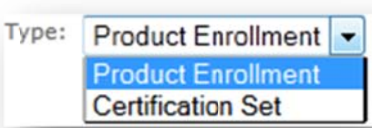
This is not an active or inactive status. Rather, it is used for bundling products together in the left side menu for users logged into the desktop. Before a category bundle is created, all of these products show up individually in the menu.



When a category bundle called Test Scorm Export 1 is created with all of the products seen in the menu bundled to it, they are no longer individually shown in the menu. Instead, desktop users would click the plus symbol to expand the list of products.

8.4 Bundle Types

Here is a guide to the bundle types and how they are used. Your site's configuration may only have the one option and it may not be like either of the examples below.



Product Enrollment

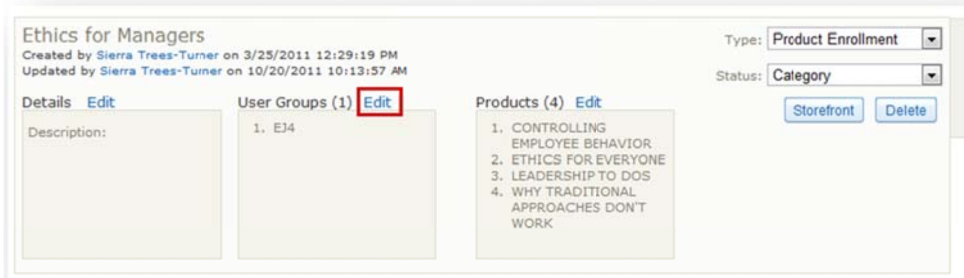
This default type is used to enroll users into all of the products assigned to the bundle. When you want to create a category or a registration bundle, you would use this type.

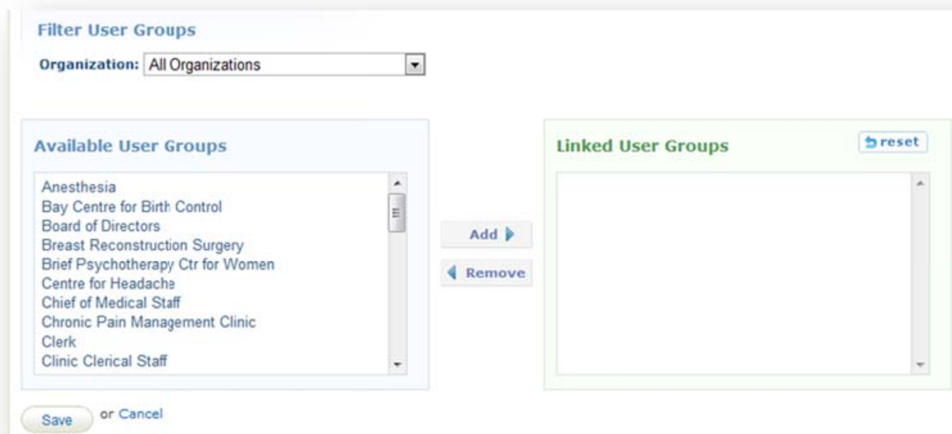
Certification Set

This is a custom type that allows you to bundle multiple certifications into one bigger certification. It is not an available default type, but can be customized for your system. When the user goes into the desktop side and has earned certifications that are part of a certification set bundle, they will see the certification bundle printout that lists the individual certifications instead of viewing only the single certifications.

8.5 Assign User Groups

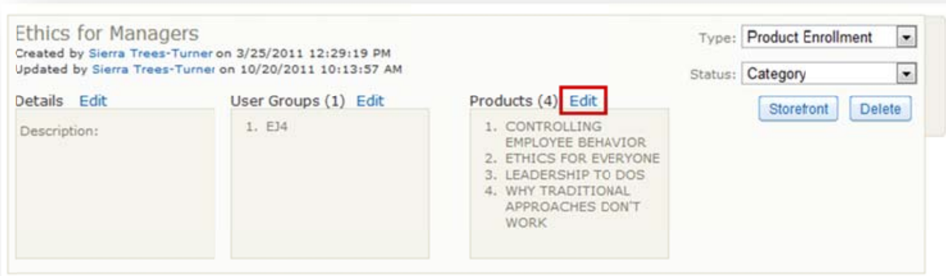
To assign user groups to a bundle, click the edit link next to the user groups column in the bundle's information box. This will open the edit user group page for the bundle. Click to highlight individual items and then select either the "add" or "remove" button. Select multiple items by holding down the ctrl or shift keys or by clicking and dragging with your mouse. You can limit the amount of user groups you see by using the organization drop down menu to see only user groups belonging to one organization at a time. Click the reset button to start over before saving. When you have finished updating your linked items list, click on the save button.

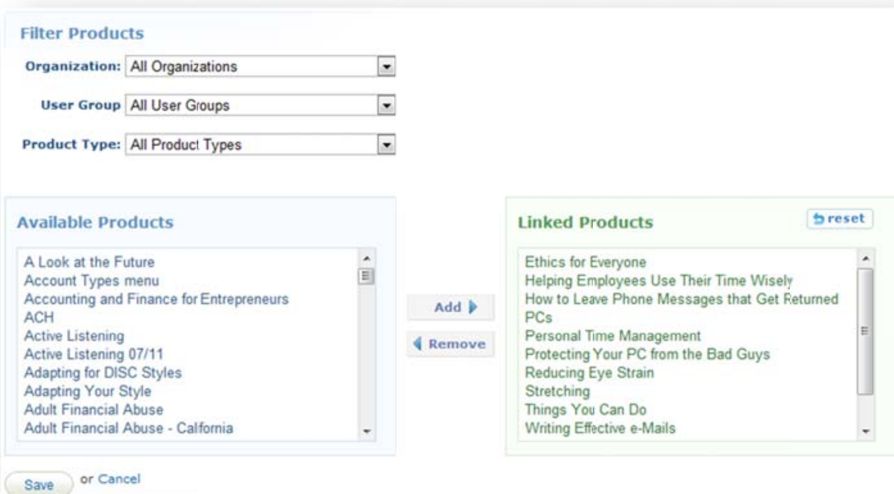




8.6 Add Products to the Bundle

To assign products to a bundle, click the edit link next to the products column in the bundle's information box. This will open the edit product list page for the bundle. Click to highlight individual items and then select either **Add** or **Remove**. Select multiple items by holding down the ctrl or shift keys or by clicking and dragging with your mouse. You can limit the amount of products you see by using the filter drop down menus to see only products belonging to specific organizations or user groups or filter by product type. Click the reset button to start over before saving. When you have finished updating your linked items list, click on the save button.





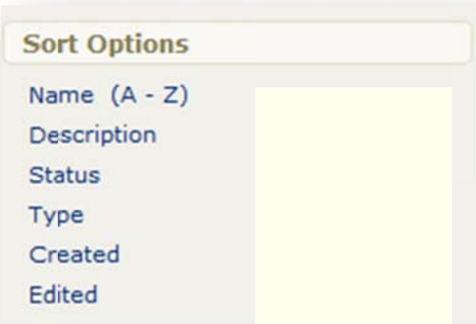
Adding New Products to Existing Bundles

Adding a new product to an existing a bundle will not automatically register that product to participants who have access to the bundle. The system will ask if you want to update the registrations for all users who have Access Codes associated with that Bundle. Answering yes does all the work.

8.7 Sort and Filter Bundles

Bundles are sorted alphabetically by default. To change the order in which the list of bundles is displayed, click any of the options under the Sort options menu on the right hand side: alphabetically by name (ascending or descending), by description, status, type, by created date (from oldest to newest or from newest to oldest) or by edited date (from oldest to newest or from newest to oldest).

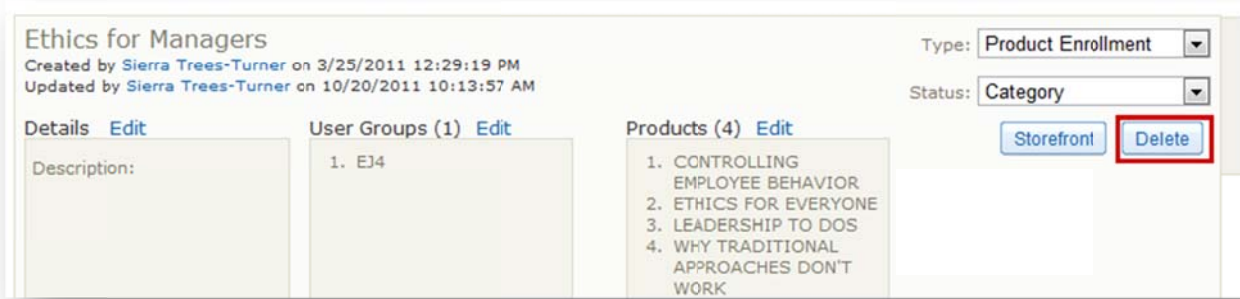
To show only specific bundles, use the filter menu on the right hand side to help you find a bundle by typing in a simple search term. This is particulary useful if you have many bundles.



Filter Option	Description	Click Go
Reset	Choose the reset link at the top of the filter options menu to remove any filters.	Click Reset
Bundle Name	Enter a word or two that is contained in the name of the bundle.	Required
User Group	Select a User Group to see only bundles assigned to that group.	Required
Topic	Use the drop down menu to see only bundles that contain the selected Product.	Required
Status	Filter to see bundles only with a certain status.	Required
Type	Filter to see bundles only of a certain type.	Required

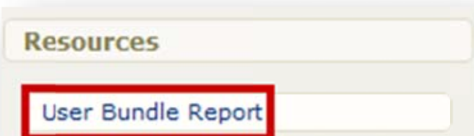
8.8 Delete Bundles

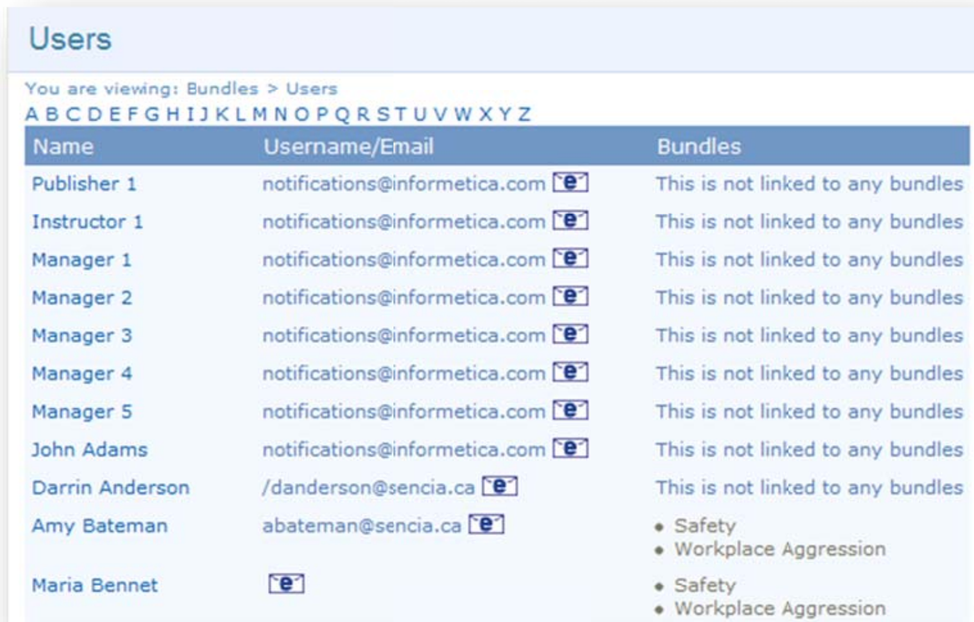
To delete one bundle at a time, click the delete button in the corresponding bundle's information box. To delete several bundles at once, select the bundles you would like to delete by selecting them and then clicking the delete selected link from the options menu on the right. On the warning prompt, click OK. After deleting a bund le, you u will return to the main bundle screen.



8.9 User Bundle Reports

The user bundle reports allows you to see which bundles each user is linked to. Simply click on the user bundle report button under the resources menu on the right to view a list of all users and their associated bundles.





8.10 Using Bundles to Assign Products

This feature is available only to site managers.

Many clients like to use bundles in conjunction with access codes for easy enrolment of one or many users into products. A bundle can be assigned to an access code and then users can enter the code into the Quick Enroll field in their home page (if enabled). After using the code, they will be enrolled into the user groups and products in the bundle.

- Add products to the bundle.
- Add the bundle to an access code (see Access Codes chapter for more). 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.

Auto Enrolment Configuration Restriction

This option is not available for systems with auto enrolment. Systems that automatically enrol all users in a group into the same courses, cannot attach bundles to access codes.

9. Certifications

Informetica's certification tool allows site managers to create rules for certification and then have them automatically assigned or choose to assign them manually. Certifications can be based on course completion, curricula completion, and test results and you can set expiry dates, assign user groups, and even create your own customized certificates for participants to print out. A default template is provided for certification printouts.

Topics Covered in this Chapter

Certifications vs Certificate

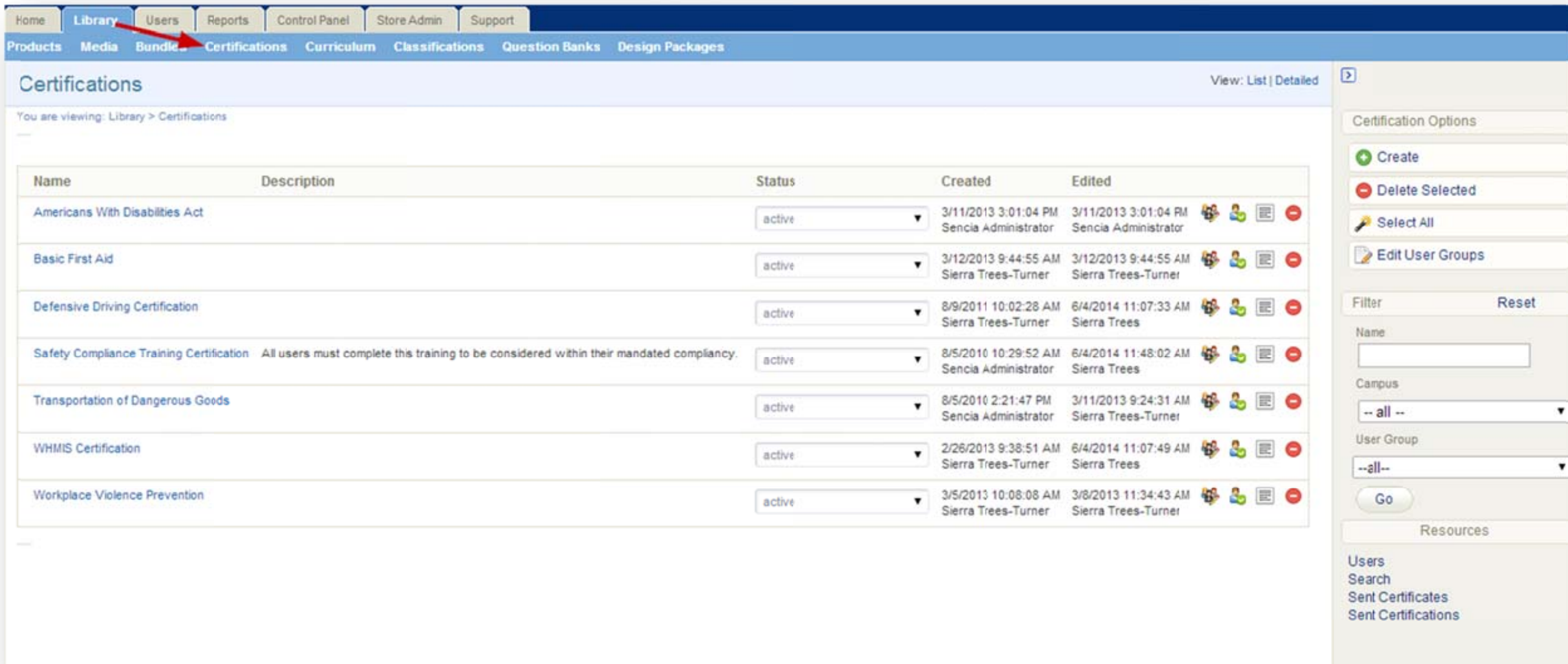
What's the Difference?

Certifications

Certifications are awarded to users who have completed requirements in one or more specific products. Site Managers create the requirements for certification and provide participants with a personalized printable certification.

Certificates

Certificates are simple proof of completion via Informetica system timestamps.



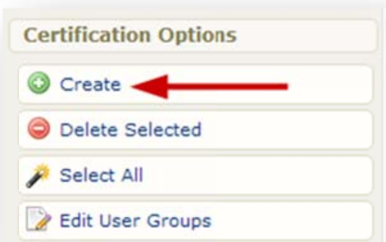
Description of the fields

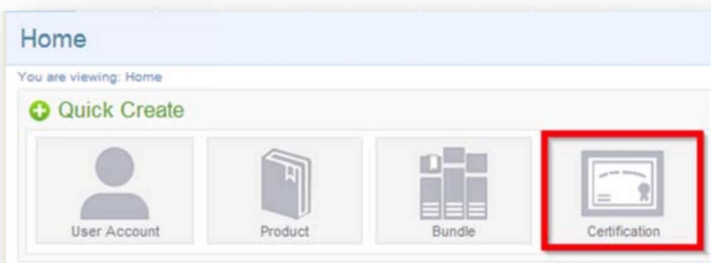
Field	Description
Name	The name appears on the certification itself, so choose something relevant. Select the name change to edit it.
Description	An optional description of the certification will appear here. Select the name to make edits to the description.
Status	Toggle the certification to active or inactive.
Created/Edited	Indicates the date, time and user who created and last edited the certification.
User Groups	Select which user groups the certification applies to.
Check Eligible Users	Capture users who have previously met the conditions of the certification but do not yet have it applied to their profile.
Printout	Create a new certification design or make edits to an existing one.
Delete	Deletes the certification and all associations with it. A deleted certification will no

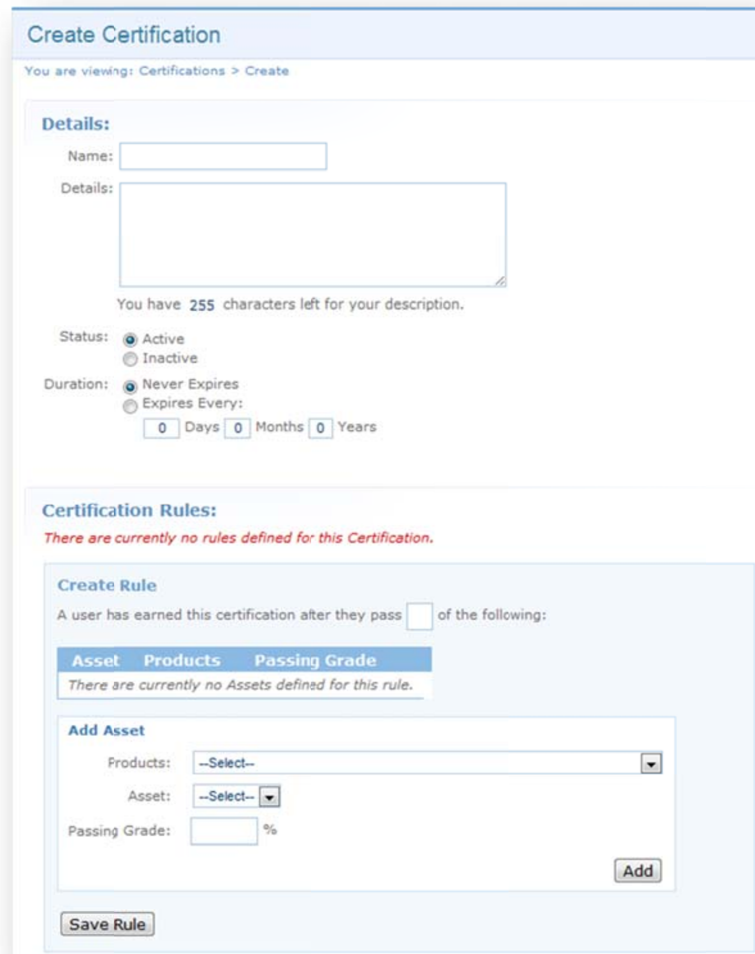
9.1 Create a Certification

This feature is available to Site Managers.

Navigate to the certification page from the library tab and then clicking the certifications link. The main certification page lists all available certifications alphabetically. To show specific certifications or to narrow down the list, use the filter menu. From the main certifications page, click the create button under the options menu on the right. Alternatively you can create a new certification from the home page under quick create by clicking certification. Either method will bring you to the create certification page.



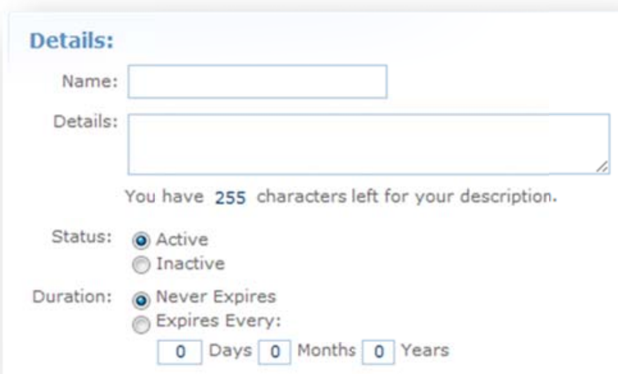




Here are a few important things to keep in mind when creating certifications:

1. Users can only achieve active certifications which are linked to their user groups.
2. Only active certifications appear on a user's list of achieved of certifications. Inactive certifications are hidden from the user.
3. Use the **Check for Eligible Users** utility to find users who have completed the certification requirements before the certification was created and add the certification to their list of achieved of certifications.
4. Updating SCORM content will not update existing certifications. A new certification will need tp be created.
5. Assets added to a product after a certifcation was created will require a new certification to include the asset.
6. If you update an existing asset that is not pointing to a specific SCO, then a new certification is not needed.

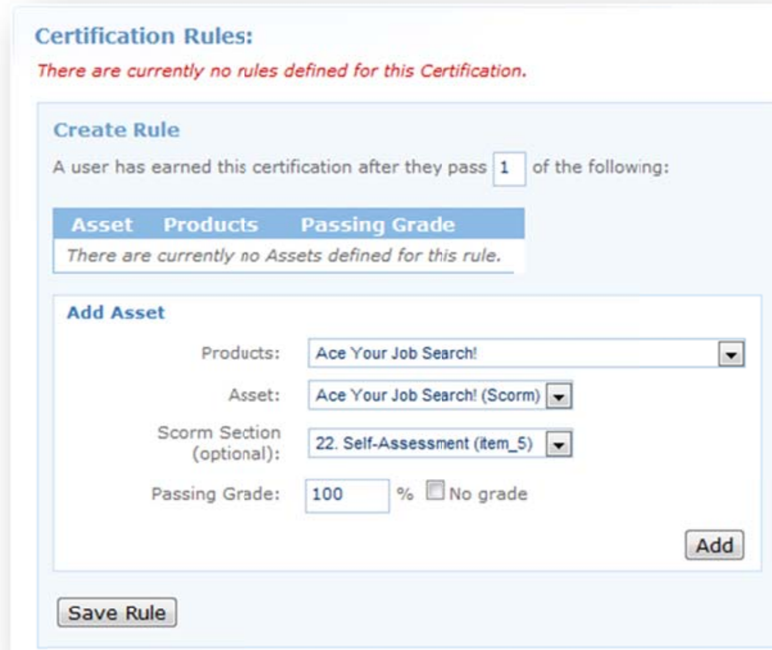
9.1.1 Step one: Certification Details created



Field	Description	Input
Name	Enter a name for the certification.	Required
Details	Enter a description or details about the certification, if desired.	Optional
Status	Select whether this certification is active or inactive.	Required
Duration	Enter the duration (never expires or expires every (number of days, months or years)	Optional

9.1.2 Step Two: Certification Rules

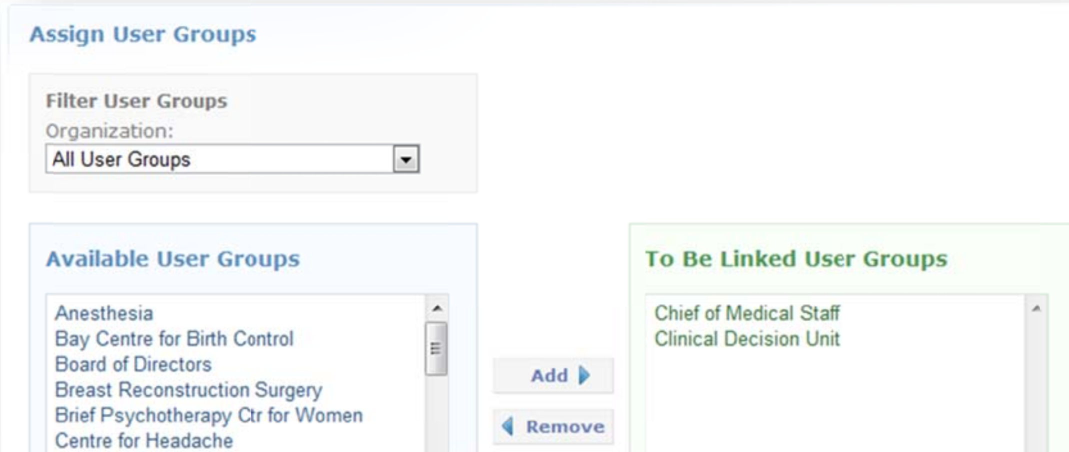
Certification rules cannot be edited once they are saved. This is to prevent affecting the qualification of any participants - current and past. If a certification has changed, you can create a new certification with the updated rules and then deactivate the certification previously used.



Field	Description
Create Rule	Specify the total number of items that must be achieved for the certification.
Add Product	Select a product from the dropdown menu. Only active products show in the menu. A new rule is required for each product.
Add Asset	Select an asset from the dropdown menu. Only active assets show in the menu. A new rule is required for each required asset. The following assets can be used when creating a certification rule: Modules, SCORM, Tests (Assessments, Evaluations, Prova).
SCORM Section	Applies to SCORM assets only. A certification is applied based on the SCORM's passing requirements, so this is often optional. It may be required if there are multiple SCOs are specifically required for the certification. A new rule is necessary for each required SCO. Select a section from the dropdown menu and apply a passing grade.
Passing Grade	Enter a passing grade requirement as a percentage. The certification pass rate is a requirement for Informetica evaluations, but on configuration, you can opt to skip the certification pass rate for SCORM assets.
No Grade	Enable this checkbox to create certifications with SCORM items as simply completed. When "no grade" is enabled, a user will obtain a complete/incomplete status for the SCORM instead of a grade.
Add or Remove	Select **Add** to accept the rule. Repeat adding assets as required. You can remove added rules, but only before you save them.
Save Rule	**Save Rule** once all requirements are added and add more rules, as required. Rules cannot be edited or removed after saving.

9.1.3 Step Three: Assign User Groups

Click to highlight individual user groups and then select either the "add" or "remove" button. Select multiple items by holding down the Ctrl or shift keys or by clicking and dragging with your mouse. You can limit the amount of user groups you see by using the campus drop down menu to see only user groups belonging to one campus at a time. Only users in the selected user groups will be eligible to obtain the certification, even if they have satisfied all requirements.



Certification Passing Grades

It is usually best practice to set the passing rates of the certifications to the passing grades of the assets (such as a test or SCORM). However, there may be circumstances in which you do not want them to match.

Higher Certification Pass Rates
If the certification pass rate is set higher than an asset's pass rate, then the user may not be eligible for the certification, even if they passed the asset. This may be desired in cases where you require a higher score for certification, such as advanced users or experts.

Lower Certification Pass Rates
If the certification pass rate is set lower than the test, then the user may obtain a certification, even if they failed the asset.

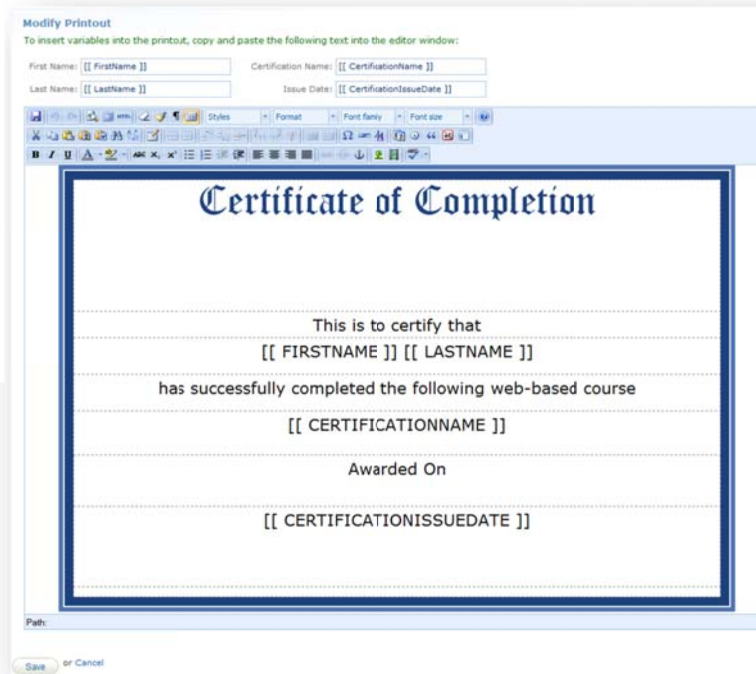
9.1.4 Step Four (Optional): Certification Printout

You have the option to provide a certificate for your participants to print out. The default template is HTML based and is editable via a WYSIWYG editor. The editor allows a site manager to edit in the publishing window or directly within the HTML. Images may be included from the media library to be displayed on the printout. The certification printout publishing window includes dynamic content place holders to auto-populate information such as the learners first and last name, the name of the certification, and the date the certification was earned. There are even two types of dynamic place holders for dates: [[CertificationIssueDate]] and [[CertificationIssueDateFormatted]]. The issue date has the date and time. The formatted date shows the words and no time.

Creating a printout certificate only needs to be done once, and then the LMS will take care of the rest.

Modify Printout

You can return to this printable certificate to update it at any time, even after the certification is saved. To edit a printable certificate, click the printout button in the information box of the certificate on the main certificates page. Make any desired changes using the publishing window and then click the save button. Press OK when prompted.



9.1.5 Step Five: Save

You must make sure to save the certification as a whole. Click the save button at the bottom of the create certificate screen. After saving, you will be brought back to the main certification page where you can create, delete or edit certifications

9.2 Sort and Filter Certifications

This feature is available to Site Managers.

Certifications are sorted alphabetically by default. Use the filter menu to help you find a specific certification. You can type in part of the name or see all of the certifications for a selected Campus and/or User Group. Select **Go** to execute the filter or **Reset** to clear your filter selections.

9.3 Delete or Inactivate Certifications

This feature is available to Site Managers.

Delete or Inactivate a Single Certification

Delete: From the main certifications page in detailed view, select **Delete** in the certification Information box. Click yes when prompted to confirm. **Inactivate**: remove the check mark in the box next to the word active. Certifications that are expired are indicated on the user's profile.

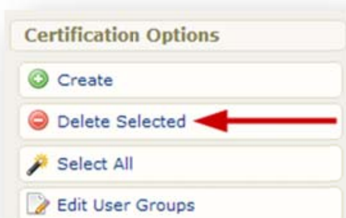
Deleted vs Inactive Certifications

Deleted Certifications: Deletion permanently removes certifications from the LMS, reports, and user profiles.

Inactive Certifications: Inactivated certifications remain in the Informetica system, on reports, and attached to user profiles.

Delete Multiple Certifications

From the main certifications page in either list or detailed view, select the certifications you would like to delete by clicking them. Select the **Delete Selected** link in the certification options menu on the right and then click yes when the confirm delete popup prompts you. Alternatively, to delete all certifications at once, you can use the select all link under the certification options menu on the right. After deleting the certifications, you will be brought back to the main certification page.



9.4 Edit User Groups

This feature is available to Site Managers.

Navigate to the main certifications page and then select the certifications you wish to change the user groups for. Click the edit user groups link from the certification option menu on the right.

This will allow you to change the user groups of the certifications you selected. Once you select this option, the LCMS clears the user groups so you can assign new ones. Select the user groups that you would like to add from the available user groups list on the left. Hold the CTRL key and click to select multiple user groups. Click the add button in the center to move the groups to the box on the right. You can also remove groups from this list by selecting them from the right box and then clicking the remove button. Click the save button to complete the changes.

9.5 Externally Earned Certifications

Sometimes your users will complete a certification off-site or for a course that is not offered in Informetica. You can still keep track of these certifications and let uses print them out by using the import tool. A site manager must do step 1, but campus admins and campus managers may have access to the import tool for step 2.

Step 1: Create the certification in the system with at least one rule. The rule must point to at least one asset in the system to represent the offline content. The asset can be in any product that you wish to use. Many Informetica clients attach the certification to a new product created specifically for the certification.

a. Pick an existing asset OR
b. Make a dummy asset that users never see (i.e. an inactive asset) – you can even name it after the offline content if you like

The asset will not be used in any way; it's simply a way to create the certification in the system. Be careful to use an asset that won't grant the certification un-intentionally such as an asset that is automatically graded and is already associated with another certification.

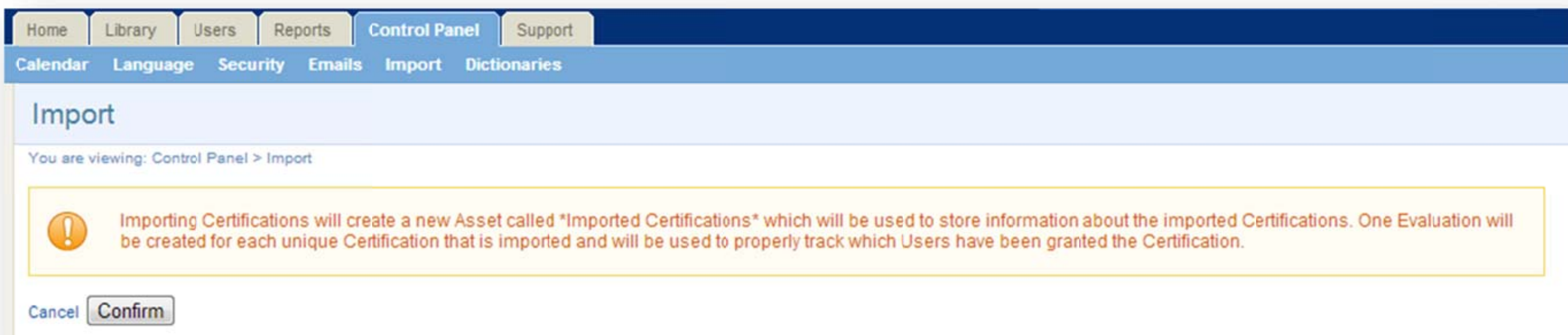
1. When setting the user groups for the certification, just select them all. This way when you wish to add that certification to anyone's record, if will be available to their group.
2. Upload your users using import tool and the certification excel template.

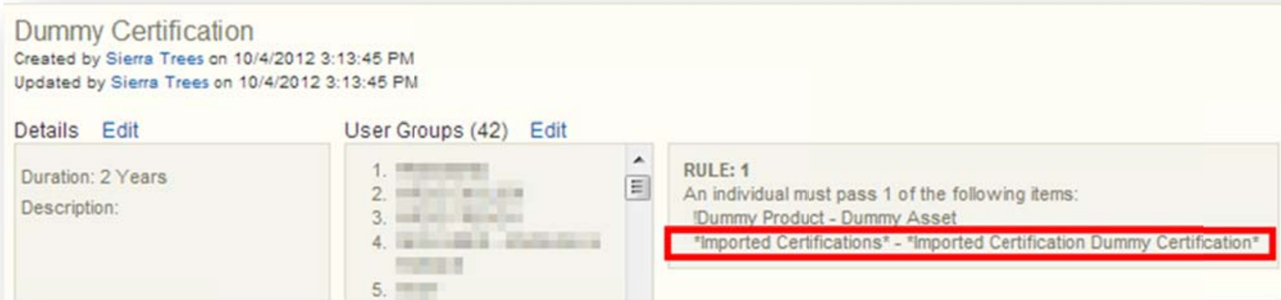
Delegate Step 2

A site manager must create the certification for step one, but other authorized user types with access to the import tool can complete step 2.

Step 2: Upload your users from an excel template to the certification that you made (see the Importing Data chapter for more on the import tool). On your excel file, make sure to fill in the exact name of the certification that you created. Behind the scenes, the system will create a fake product and asset and grant the certification to the users. This asset will not be seen by any users and does not appear with the rest of the product's assets. It is only a digital placeholder.

Note that if you wish for the users imported to appear on the "Check Eligible Users" tool, you will need to populate the Asset column on the excel file, as certifications are calculated from completed assets, not products.





9.6 Issue Certifications Upon Approval

This option is best if you would like to issue a certification only after a review process or upon approval

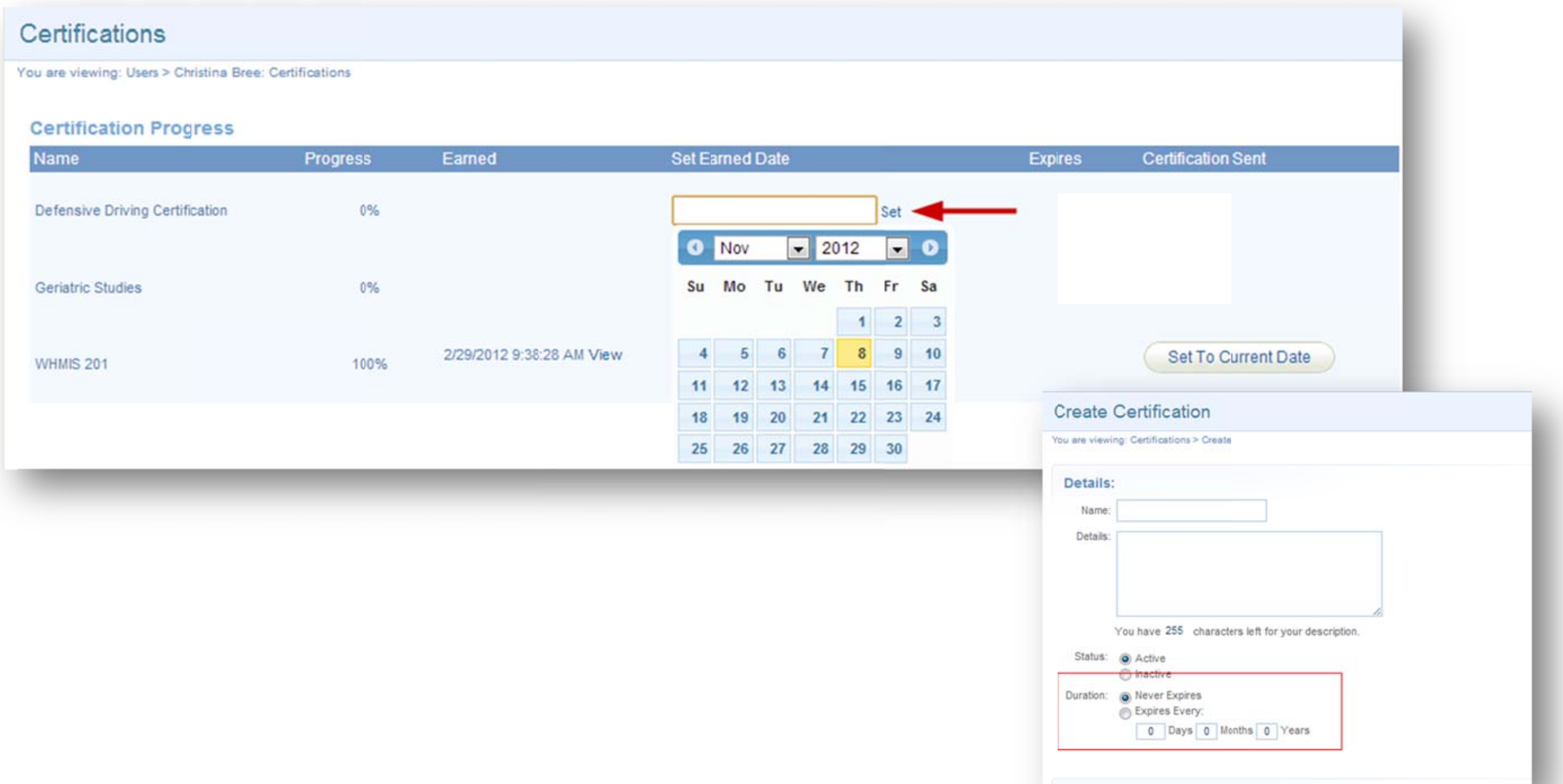
- Step 1: Create a gradable asset, such as a module (see the Assignments Modules References chapter).
- Step 2: Add a completion rule to the asset that requires a passing grade, such as 100% to pass (see the Products and Assets chapter).
- Step 3: Create a certification rule that requires the passing of this 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).

9.7 Issue Certifications to Users That Have Not Met Requirements

This feature is available to Site Managers.

If a user has not met the requirements set up in Informetica for a certification, but you still wish to issue it, then you can do so manually. Open the user's profile and then click the certifications option from the sections menu. You will see a listing of all certifications the user has already obtained, is working toward, or is eligible to earn. *See the Users chapter for more information on the certification option of the sections menu.* Users are only eligible for certifications attached to the same user group that the user belongs to.

For any certification that is not yet earned, click "set", and then use the calendar to issue the date the certification was earned or set to current date. An expiry date will automatically populate if the certification was created with an expiry in the system.



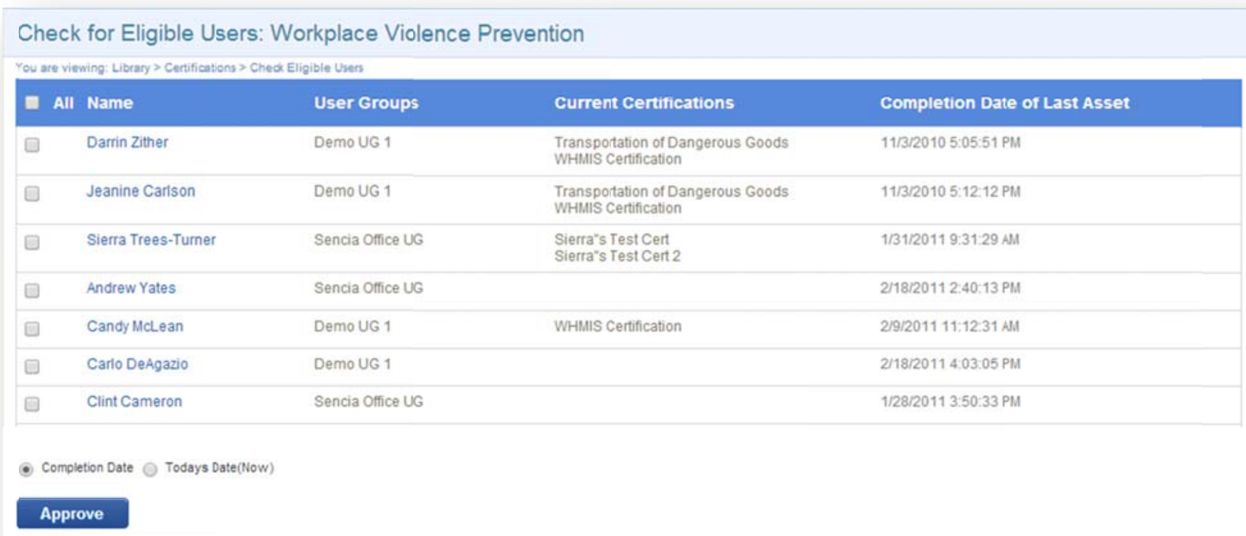
9.9 Check Eligible Users

This feature is available to Site Managers.

You may create a certification path after users have completed a product or you may a need to create a new certification to include additional rules. Informetica has a tool in place to capture the users who qualify for the new certification. Select **Check Eligible Users** to pull up a list of users who qualify for the new certification.

List View

Detailed View



Check for Eligible Users: Workplace Violence Prevention

You are viewing: Library > Certifications > Check Eligible Users

All	Name	User Groups	Current Certifications	Completion Date of Last Asset
	Darrin Zither	Demo UG 1	Transportation of Dangerous Goods WHMIS Certification	11/3/2010 5:05:51 PM
	Jeanine Carlson	Demo UG 1	Transportation of Dangerous Goods WHMIS Certification	11/3/2010 5:12:12 PM
	Sierra Trees-Turner	Sencia Office UG	Sierra"s Test Cert Sierra"s Test Cert 2	1/31/2011 9:31:29 AM
	Andrew Yates	Sencia Office UG		2/18/2011 2:40:13 PM
	Candy McLean	Demo UG 1	WHMIS Certification	2/9/2011 11:12:31 AM
	Carlo DeAgazio	Demo UG 1		2/18/2011 4:03:05 PM
	Clint Cameron	Sencia Office UG		1/28/2011 3:50:33 PM

Completion Date   Todays Date(Now)

Approve

Choose the users that require the certification, select a certification date, and then **Approve**. You will then see a confirmation screen letting you know that the certification has been applied to the selected users.

Completion Date:

Applies the user's actual achievement date based on the rules of the certification. This could be any time in the past. Expiries will still apply.

Today's Date (Now):

Select this date to make the certification valid starting now.

9.10 Certification Resources

This feature is available to Site Managers.

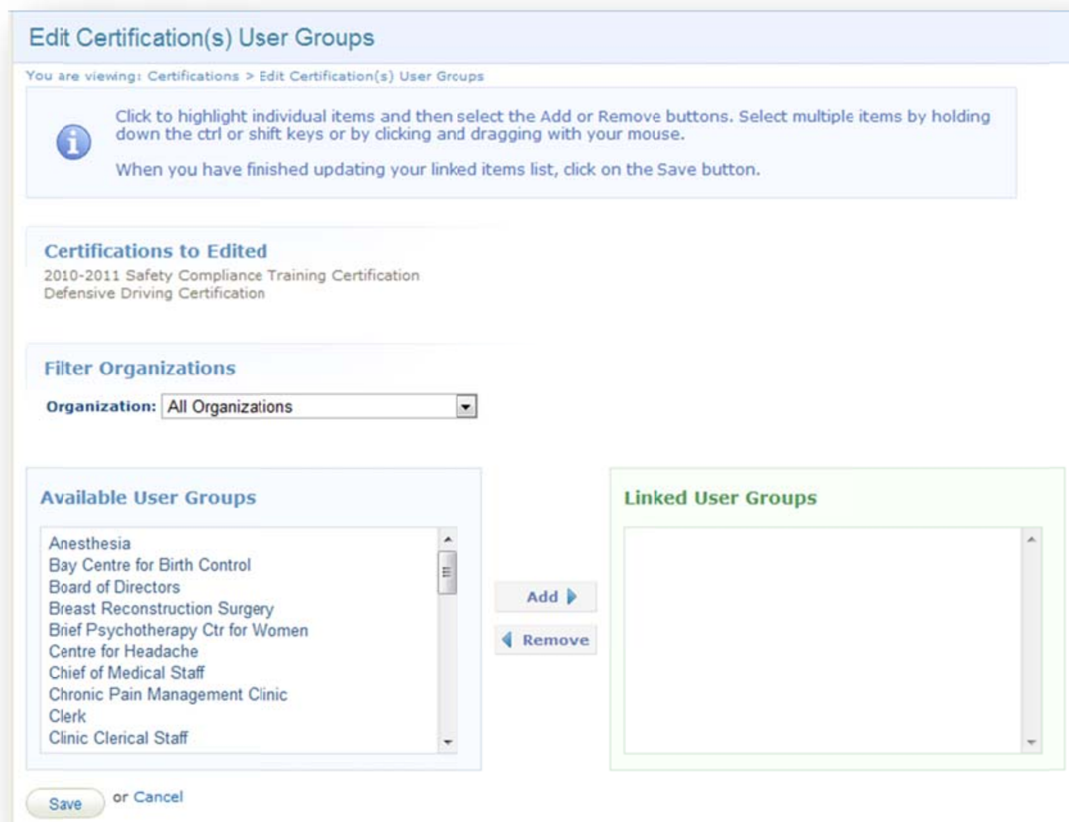
The resources menu gives you some additional options in view and interacting with certifications.

Users: View a list of all users who have earned certificates. Filter user list by user group or certification name.

Search: List certifications and display search results by name or user group

Sent Certificates: Campuses that send out physical certifications can use this tool to view a list of eligible users, and mark certifications that have been sent, and see which certifications have already been sent.

Sent Certifications: This list will let you mark user certifications as sent, as well as view a list of eligible and already sent certifications.

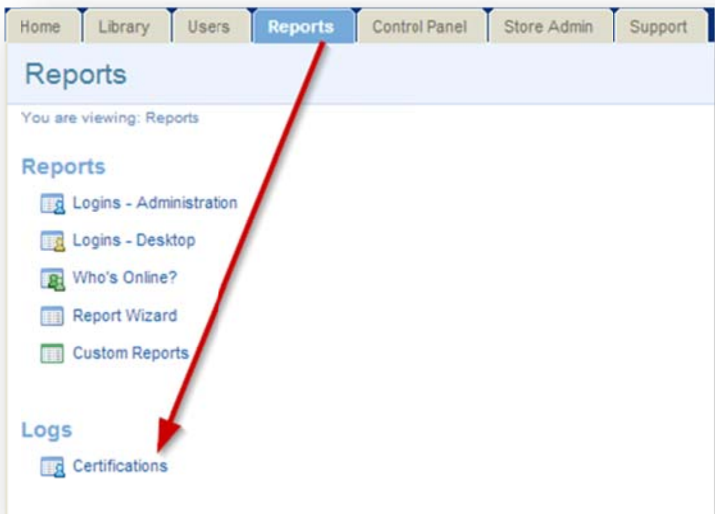


9.11 Certification Log

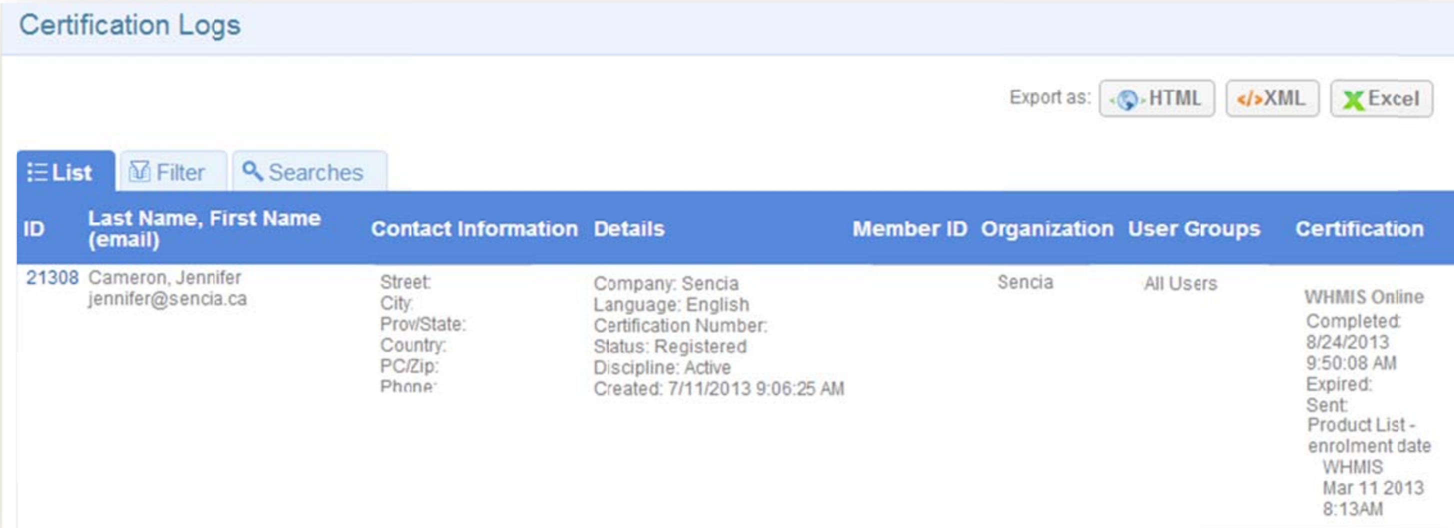
This feature is available to Site Managers.

The certification log retains a full history of certification achievements documented within Informetica and allows clients to retain certification records for users whose accounts are archived or deleted from Informetica. This tool is most beneficial to clients who have a large amount of user accounts that need access to the system for a finite period. The certification log records all certification earned dates, certification modifications, additions, removals, and account status changes. Logs can be exported in three different formats: HTML, EXCEL, XML.

To access the certification log, select the reports tab and then select certifications under the logs header.



Information stored within the certification log is a snapshot of the data at a given time. Updating the user's account will not retroactively update logged information. For example, if a user completes "Certification Alpha" within Campus ABC and the certification is later moved to Campus XYZ, the certification log will show that the user earned "Certification Alpha" within Organization ABC. Users who complete certification training multiple times will have a log entry for each instance the certification is earned.



Here is a description of each of the fields of information available in the certification log. Note that the fields visible on your system may differ.

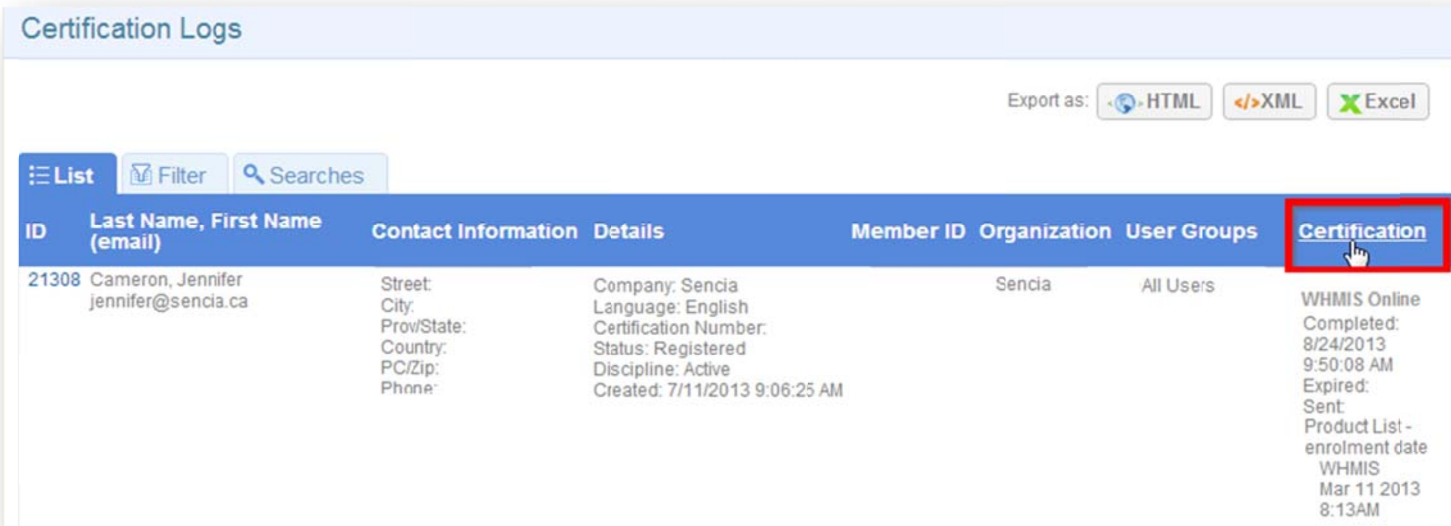
Filter Option	Description
ID	Informetica will automatically assign an ID to each certification record.
Name (Email)	Indicated the user's full name and email address.
Contact Information	The information here is based on the user's profile and is unique to your system.
Details	Various details are listed here from the user's profile, as defined for your system.
Member ID	Indicates the unique user ID if used by your system.
Campus	Indicates the campus or organization that the certification belongs to.
User Groups	Indicates the user group that the certification is associated with.
Certification	Shows the certifcation name and dates for completion, expiry, sent, and the associated product enrolment.

9.11.1 Sorts, Filters, and Saved Searches

You can sort and filter the log to view more specific results.

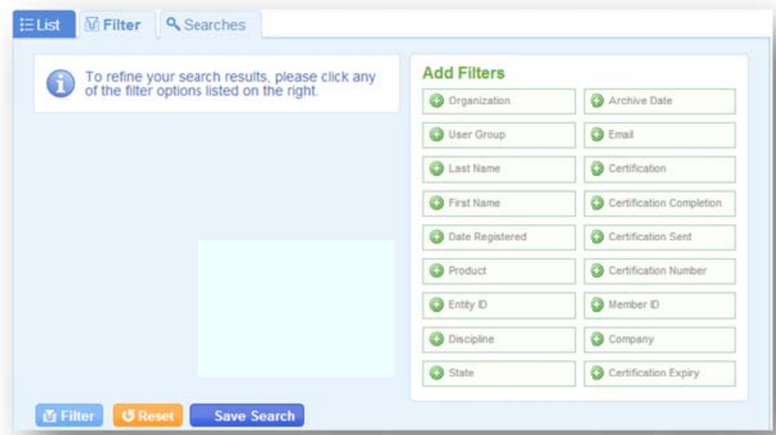
Sort

Click any of the headers to sort the list by that header's information.

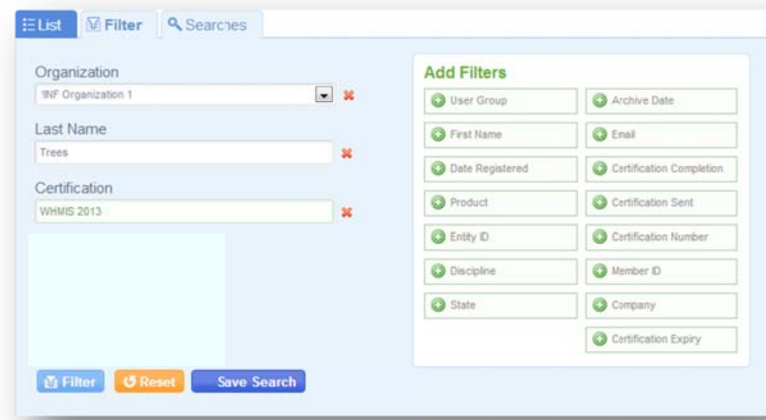


Filter

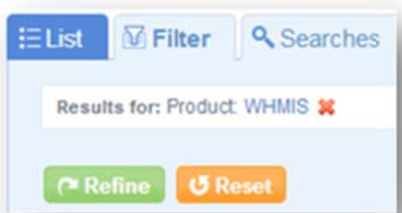
5. Select the **filter** tab to add one or more filters for refined log results.



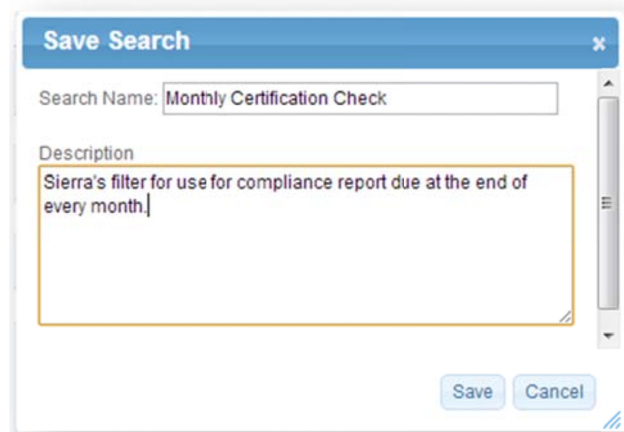
6. Enter any relevant data for your filters and then select **filter**.



7. After running a filter, you can select Refine to adjust your filter options or Reset the filter.



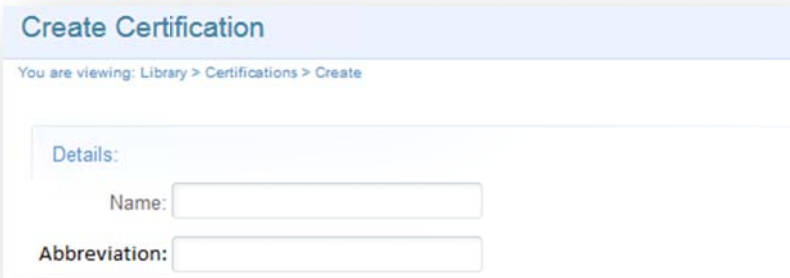
8. Select **save search** and give the search a unique name and description to make your filter available for easy repeated use. Saved filter searches can be accessed from the **searches** tab.



9.12 Create a Training Record upon Certification

If configured, Informetica can automatically create an internal supplemental training record for a user when they earn a certification. The training record will include a copy of the certification as a PDF file. This is an optional rule that you can apply when you create a new certification. Training records created both manually and with the certification tool appear on the supplemental training screen and report R404.

1. From the certification creation screen, give the certification an **Abbreviation**.

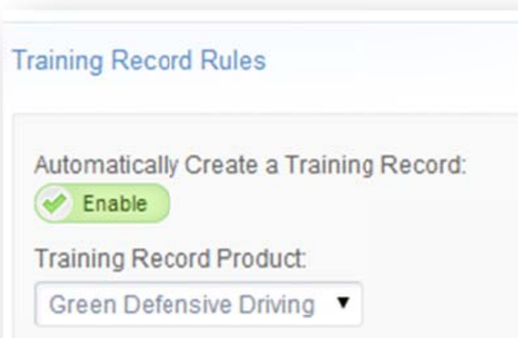


Abbreviations

Abbreviations are limited to ten characters. They are used as part of the pdf naming convention when a training record is created from a certification:

firstName_lastName_Abbrev_Date&TimeStamp.pdf

2. After you have added one or more certification rules, toggle **Create Training Record** to active. It is located under the training record rules.
3. Select a product from the drop down menu. Certification rules may have more than one product, but you must select only one for the training record.



9.12.1 Training Record Rules - Deletion, Inactivation, and Editing

Click the name of the certification to change the abbreviation or toggle the Create Training Record off. This will not affect any existing training records or any previously generated pdf files.

Deleting, inactivating, or editing a training record associated with an earned certification will not have any impact on the associated earned certification information for a user. Deleting, inactivating, or editing a certification or a user's certification history will not impact associate training record reports or the supplemental training screen.

Deleting an internal training record will remove the certification PDF file.

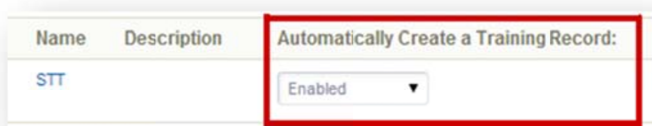
> **Product Deletion**
> Informetica checks to see if a deleted product is associated with a certification based on the certification training record rules.

9.12.2 Certifications Page

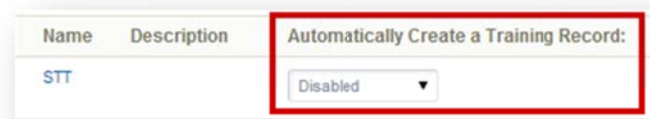
If the create training record configuration is activated for your system, the main certification page will display additional information about the training records. This information will be included in both the detailed view and the list view.

List View:

Enabled

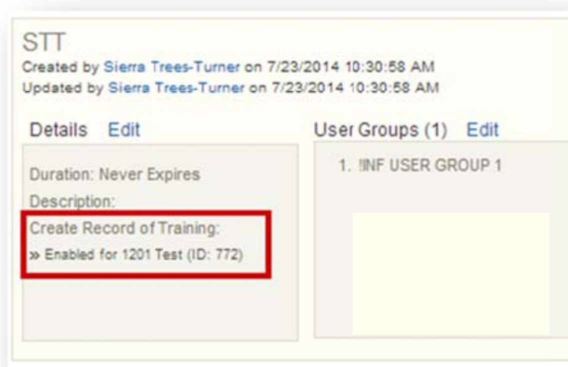


Disabled

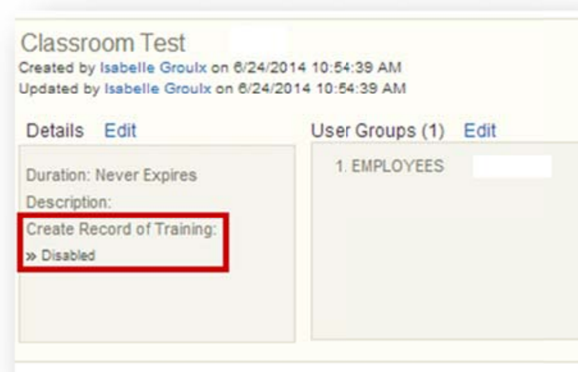


Detailed View:

Enabled



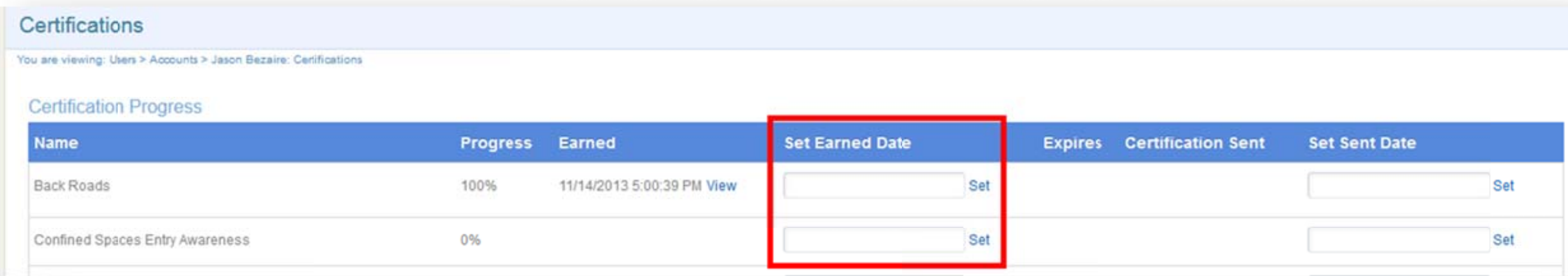
Disabled



9.12.3 Training Records are also Created When Using These Certification Tools

Training records with attached PDF certifications can also be created when using these other methods of creating certifications. The certifications must have Create Training Record enabled.

- Check eligible users tool
- Site managers manually setting a certification earned date in a user's profile will be informed that a new training record has been created. Any pre-existing training records will remain unaffected.



- Certification import utility

9.12.4 Attached PDF Certifications

Manually created training records will not include a system generated pdf copy of the user's certification. Only training records created by the system will include a pdf attachment.

When training records are created manually or with the import tool, the user's certifications are not updated or tracked in any way. A new certification will not be granted within the LMS upon manual creation.

PDF certifications created with certification rules are accessible in the following locations:

- Participant transcripts, my progress, and certifications pages
- Supplemental training screen
- User details supplemental training section

10. Calendar, Tasks, News, and Forums

Topics Covered in This Chapter

10.1 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.

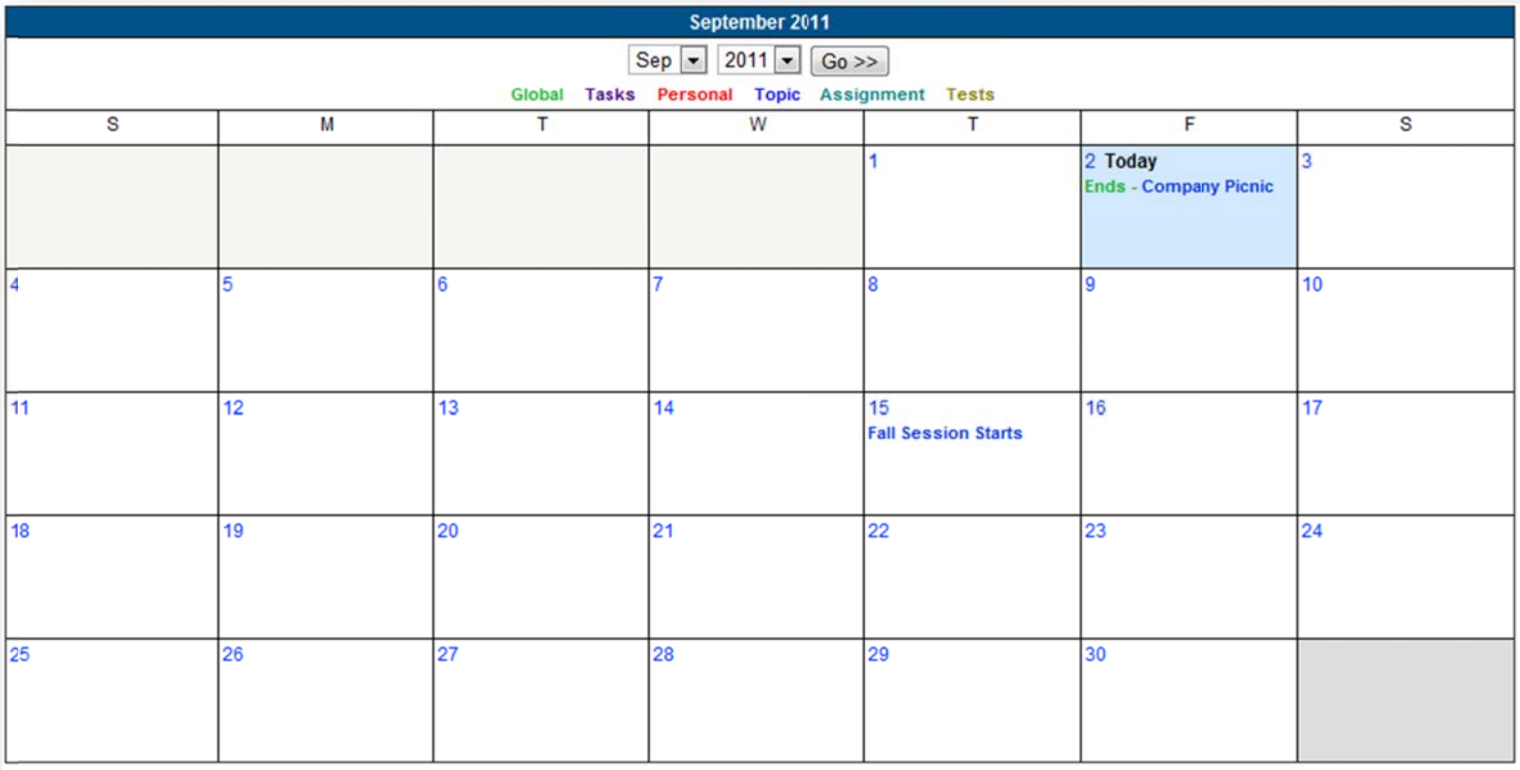
Type	Description	Created by
Assignment	Assignments are added to the calendar automatically based on the due date. **These events are displayed on the calendar in teal**	Automatically Created
Global	Global events are displayed on the calendar for most registered users as well as in the news box on user's 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

10.2 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.

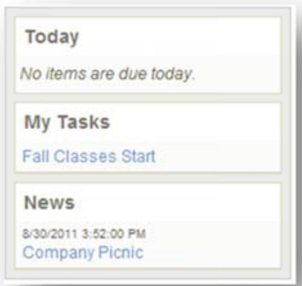


By default the calendar shows the current month with the current day highlighted in blue. To view a month that is not the current month, use the drop down menus to change the month and year and then press the go button. Click on any event to view more details, who created the event, and the start and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

10.3 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.



10.3.1 Today

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

10.3.2 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.

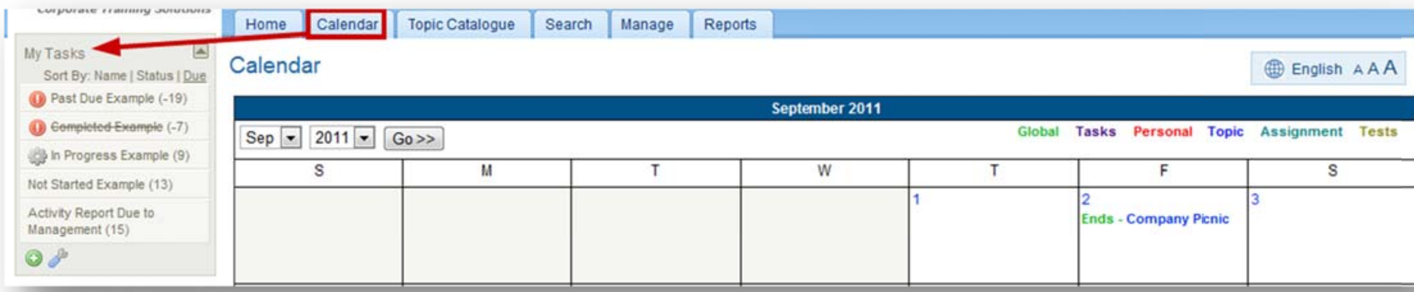
10.3.3 News

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.

10.3.4 Managing 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.

10.3.5 Sort Tasks

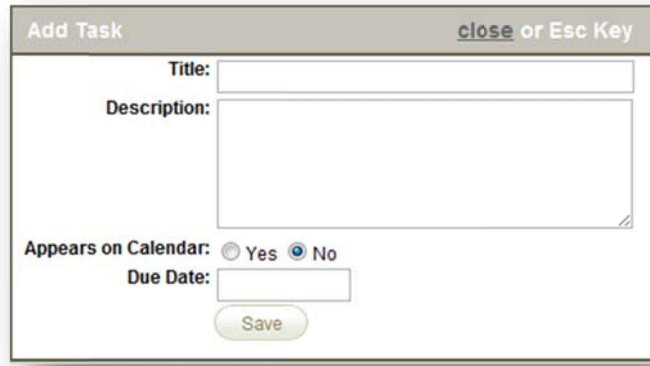
Tasks are sorted automatically by due date, but you can re-sort the list to show the tasks alphabetically by name, completion status, or due date. To interact with My Tasks, click the calendar tab from the main navigation bar and use menu on the left. Tasks sorted by status show completed items first,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

10.3.6 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

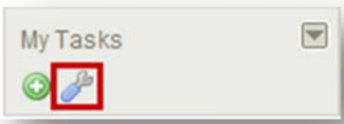


Below is a brief description of the fields.

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.

10.3.7 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.



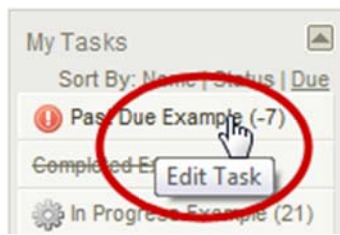

Tasks

	Title	Issue Date	Due Date	Status	Complete Date		
!	Past Due Example	9/8/2011	9/1/2011	Not Started		Delete	Edit
	Completed Example	8/17/2011	9/13/2011	Complete	9/8/2011	Delete	Edit
	In Progress Example	9/8/2011	9/29/2011	In Progress		Delete	Edit
	Not Started Example	9/8/2011	10/3/2011	Not Started		Delete	Edit
	Activity Report Due to Management	9/8/2011	10/5/2011	Not Started		Delete	Edit

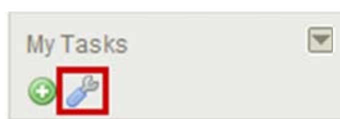
Return to Calendar

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.

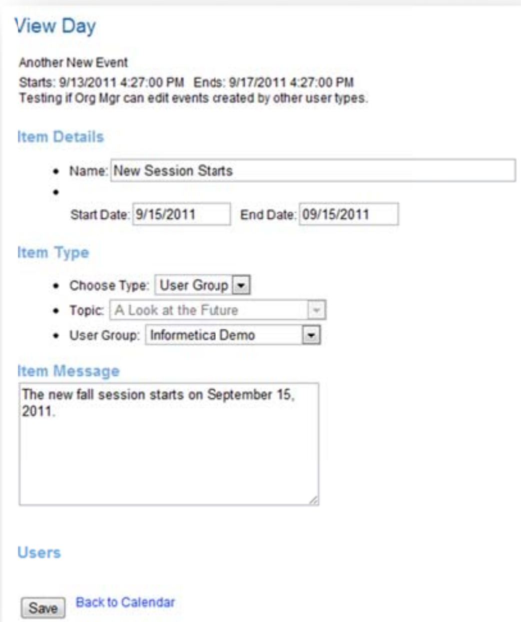
10.4 Managing Calendar and News Events

This option is not available to participants.

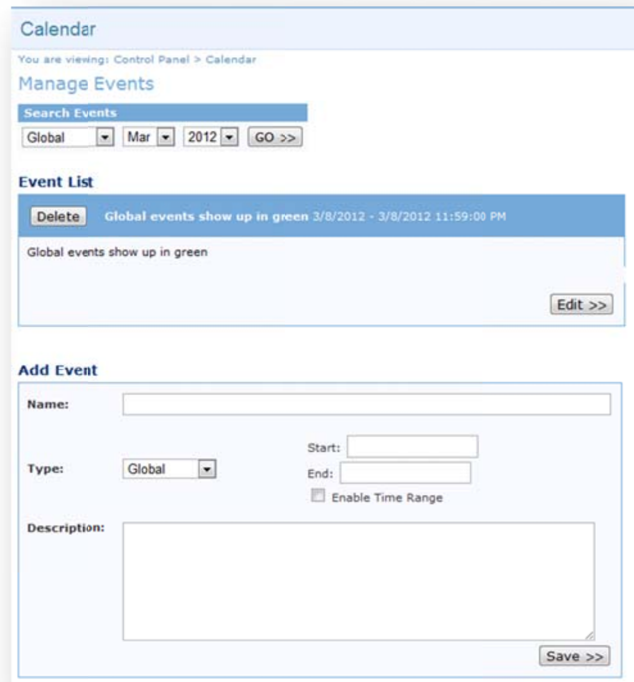
10.4.1 Add and View Events

You can create events and announcements for other users.

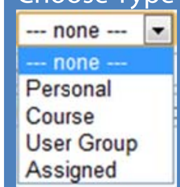
Add and View: From the calendar, click the date for the new event to open the View Day page, fill out the fields (described below), and then save. Existing events, if any, will show up at the top. Item details, item type and item message must all be completed to create a new event.



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.

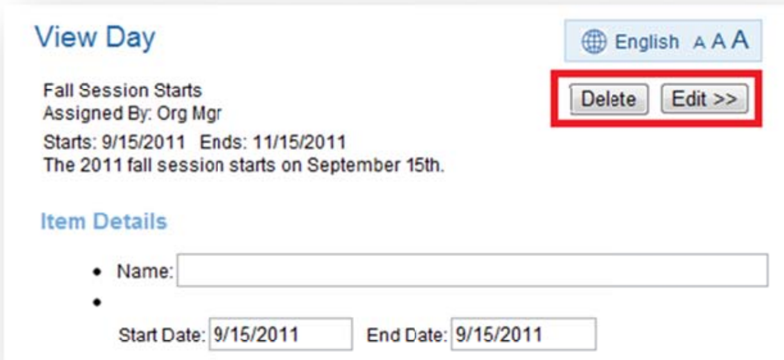


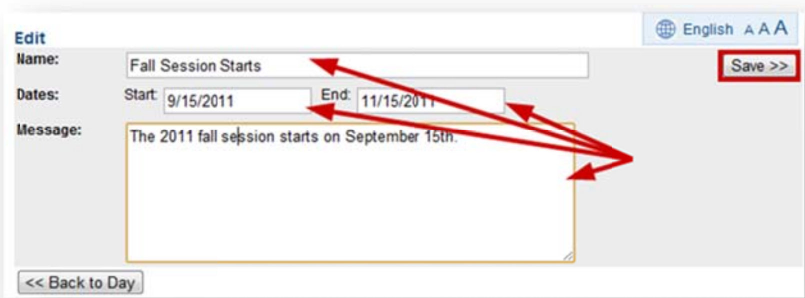
Below is a brief description of the fields:

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.

10.4.2 Edit and Delete Events

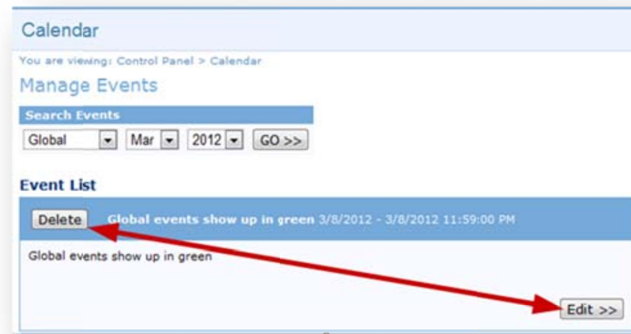
Edit: You can edit the details on events that you have created. Click the event from the calendar to open the View Day page, click the edit button on the top right, make your changes, and then save. You cannot edit global events that are set up by site managers.





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.

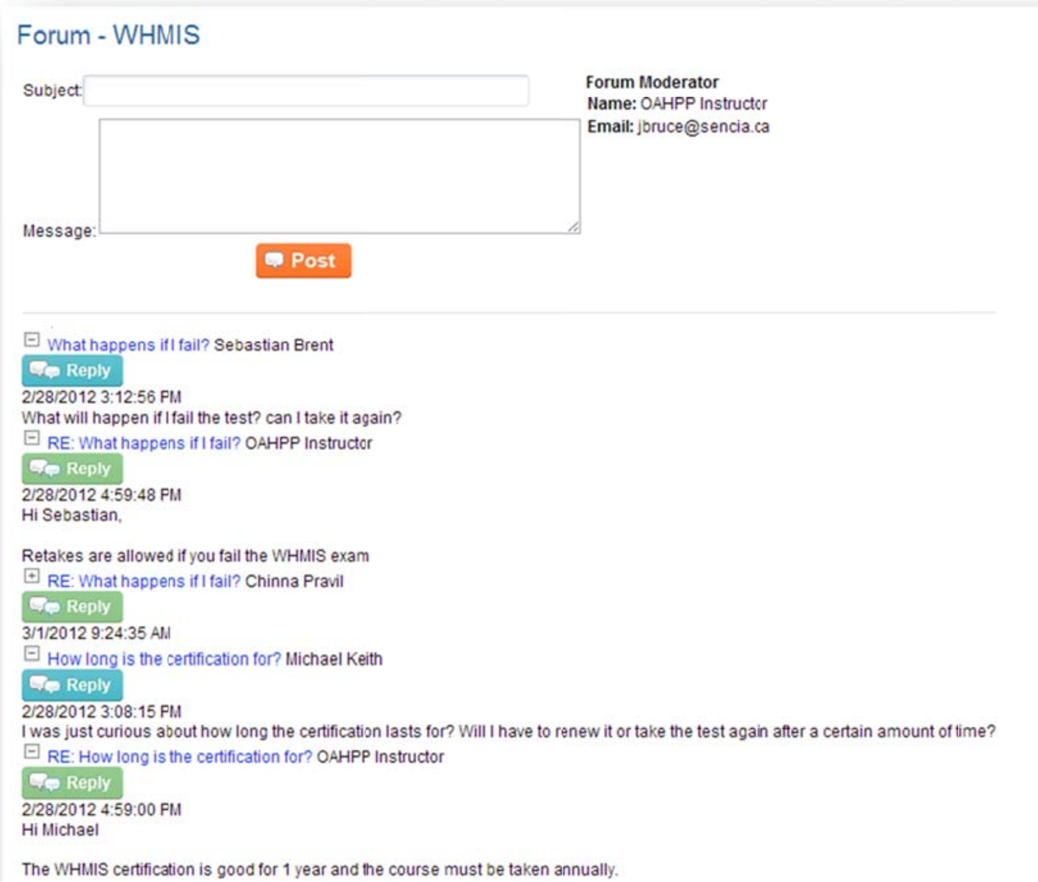


10.5 Product Forums

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.



11. Email Notifications

Informetica includes customizable automated email notifications with multiple language support that can alert users of issues that affect them. Notifications can be set up to automatically alert users regarding certain actions such as when a new account is created, a certification is completed or if a user forgets their password. These notifications inform users without requiring them to log in to the system. Emails can be managed on two different levels: LMS system emails and campus emails.

Site Managers may:

- Enable or disable notifications for the entire system.
- Enable or disable notifications for campuses.
- Make use of both custom text and dynamic pre-set text.
- Create an optional standard signature for all emails and campuses.
- Reset campus emails to LMS defaults.

Topics Covered in this Chapter

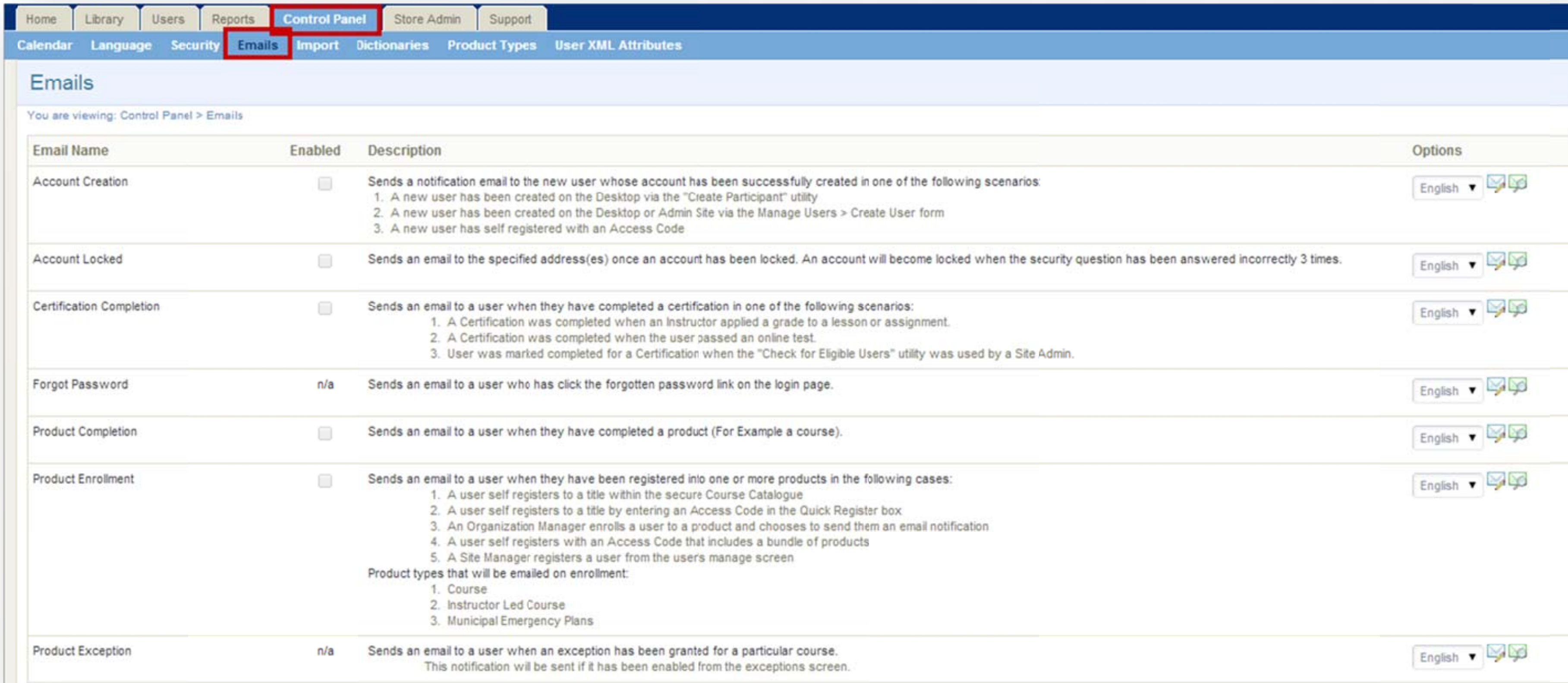
11.12.9 Product Expiry Reminder

11.12.10 Certification Expiry Reminder

11.12.11 Training Expiry Reminder

11.1 The Email Notifications Page

Navigate to the page by selecting the Control Panel tab and the selecting Emails.



Email Name: the type of email notification.

Enabled: only emails that are enabled for your system will be sent out. To enable an email, contact your Sencia Administrator.

Description: Gives a description of each email and in which circumstances it is mailed out.

Options: Inactive options for language, preview, and edit let a Site Manager make changes to the LMS email configurations. Types of Email Notifications

Email Type	Description
Account Creation	Informs new users that their account has been created. The email is sent out in one of the following scenarios: • Account is created by a manager, publisher or instructor manually or via import • Account is created via self-registration via access code
Account Locked	Informs users when their account has been locked. The email is sent out when a security question or password is entered incorrectly a number of times or a site manager manually locks the account.
Certification Complete	Informs users when they have completed all requirements for a certification. The email is sent out when a certification was completed (instructor applied a passing grade or a participant passed an online test) or when site manager manually marks completed certifications using the "Check for Eligible Users" utility.
Certification Expiry Reminder	Informs users when Certifications are about to expire. The notice is sent out sent out at specified intervals (e.g. 20, 10, and 3 days before expiry). Contact a Sencia administrator to change the intervals.
Curriculum Assets Reminder	Sends an email to a user when any curricula have an upcoming due date at intervals based on your site's configuration, such as 15, 10 and 5 days before the curriculum expiry date. Please contact your Sencia Administrator for changes to these values. Emails are sent out nightly.
Forgot Password	Sends an email to a user who has used the forgotten password link on the login page.
My Experience Approved	Sends an email to a user when one of their experience log items has been approved.
My Experience Not Approved	Sends an email to a user when one of their experience log items has not been approved.
My Experience Manager Approval	Sends an email to a user's manager when experience log items are being submitted for approval.
Product Completion	Sends an email to a user when they have completed a product.
Product Enrolment	Informs users when they have registered into one or more products. The email is sent out when: • A participant self-registers to a product (for example, via the catalogue or by entering an access code) • A manager enrols a participant to a product and sends them an email notification. • A site manager registers a participant from the user registration screen. If you need to trigger the email again, remove the user from the product and re-add them.
Product Exception	Informs users when an exception is granted for a product. The exception notification must be enabled from the user's profile. See the User Accounts chapter under Exceptions for more details.
Product Expiry Reminder	Alerts users about Product about to expire. The notice is sent out sent out at specified intervals (e.g. 20, 10, and 3 days before expiry). Contact a Sencia administrator to change the intervals. eCommerce clients can use the [[Extension List]] preset text to include a link to the an extension sold on the storefront.
Training Expiry Reminder	Alerts users of supplemental training items about to expire, sent out at specified intervals (e.g. 20, 10, and 3 days before expiry). Contact a Sencia administrator to change the intervals. Training expiries are linked to the training records attached to a user's profile by a Site Manager.

11.2 LMS Emails

Navigate to the Control Panel and then click the Emails link to open the emails page. This page will show a summary of the LMS emails that are set up system wide. These default messages can be sent to all users or activated/deactivated on a case by case basis.

11.2.1 Enabled and Inactive LMS Notifications

- **Enabled** A check mark indicates that this email has been activated at the LMS level. When going in to the Campus based emails, you have the ability to also send this notification. LMS level notifications are configured during your site's initial set up. To enable any notifications that are not available at the LMS level, please contact a Sencia Administrator. Any notifications that have a check under the Enabled column are available for you to use.

- **Inactive** The absence of a check mark indicates that this email has not been activated at the LMS level. This means that even if it were to be activated at the Campus level, the notification would never be sent. LMS level notifications are configured during your site's initial set up. To enable any notifications that are not available at the LMS level, please contact a Sencia Administrator.
- n/a indicates that while this email is available for both LMS and Campus notifications, Site Managers do not have the ability to activate or deactivate the emails because they are generated a bit differently. This affects two email notifications:

1. Forgot password emails are only sent when a user specifically uses the forgot password feature.
2. The product exception email is only sent when a Site Manager creates the exception within a user's profile and manually opts to send the email.

11.3 Campus Emails

Each campus set up within your system can have its own custom emails. Navigate to the Users tab and then click the Campuses link. The Campuses screen has an edit emails or an add emails button for each Campus. Site Managers can enable or disable notifications, edit email content and navigate to the Manage Emails page for more options such as activating specific emails and adding a signature.

11.3.1 Activate or Edit Campus Emails

Campus emails that are enabled take precedence over the LMS emails and will be sent only to users who belong to the campuses. Site managers can override LMS emails for specific campuses by enabling the campus notifications (select "Send Email") . The campus emails will be sent instead of the default LMS emails.

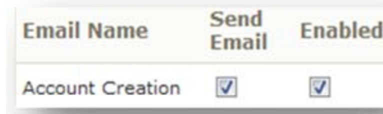
Add Emails: If emails have not yet been enabled for a campus, then the add emails button will be visible. Click this button to enable emails for the campus and override the default LMS emails. It will navigate you to the Manage Campus Emails page where you can select which emails to send and edit the content.

Edit Emails: If emails have already been enabled for a campus, then the edit emails button will be visible. Clicking edit emails will navigate you to the Manage Campus Emails page where you can select which emails to send and edit the content.

Default Emails

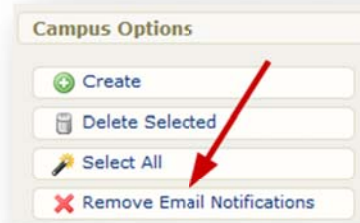
Campuses automatically send the LMS default emails unless you activate emails for the campus. Once you have the campus emails enabled, the campus settings override the LMS email settings.

Campus email notifications may only be sent if they are enabled for your system. Use the check boxes under the Send Email column to select which enables emails to send out to users belonging to this campus. If you select no emails, the default LMS emails are still overwritten, but no emails will be sent to the campus.



11.3.2 Reset Campus Emails to Default

Selecting “Remove Email Notifications” from the Campus Options menu will remove the custom notifications for that campus and reset them to the LMS default emails.



11.3.3 Set Active Status to Site Defaults

From the Manage Campus Emails page, click the “Set Active Defaults status to site defaults” link to match the selected campus emails to match the same email types set up for the LMS default emails. For example, if the LMS only uses two default emails: Account Creation and Product Enrollment, when you set active status to site defaults, that specific campus's emails will send only Account Creation and Product Enrollment notifications. You can still customize the email content for the campus.

Reset a Campus Email

If you want to reset single a campus email, make sure that “Send Email” is checked and then use the

[[LMS]] pre-set text tags within the email settings instead of writing custom text.

11.4 Pre-set Text

When creating an email message, you can use optional dynamic text strings to automatically replace values specific to each email recipient. For example, entering the pre-set text string [[First Name]] into the "body of the email will automatically insert the user’s first name. The Site Manager may choose to use the same or different pre-set text for the LMS and each campus.

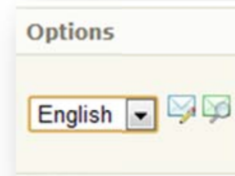
Brackets are Mandatory

When using pre-set text, include the brackets

[[ ]] around the text. You can copy/paste the string to ensure correct code.

Email Name	Preset Text Items	Email Name	Preset Text Items
Account Creation	[[First Name]] [[Last Name]] [[Username]] [[Password]] [[Login Address]] [[Manager Email]] [[Helpdesk Contact]] [[Reps Email]]	**Account Locked**	[[First Name]] [[Last Name]] [[Username]] [[Password]] [[Login Address]] [[Manager Email]] [[Helpdesk Contact]] [[Reps Email]]
Certification Completion	[[Certification Name]] [[Reps Email]] [[Certification Obtained Date]] [[First Name]] [[Last Name]] [[Username]] [[Password]] [[Login Address]] [[Manager Email]]	**Forgot Password**	[[First Name]] [[Last Name]] [[Username]] [[Password]] [[Login Address]] [[Manager Email]] [[Helpdesk Contact]] [[Reps Email]]
Product Completion	[[Course Name]] [[Course External ID]] [[First Name]] [[Last Name]] [[Username]] [[Password]] [[Reps Email]] [[Login Address]] [[Manager Email]]	**Product Enrollment**	[[Course Name]] [[Login Address]] [[First Name]] [[Last Name]] [[Username]] [[Password]] [[Manager Email]] [[Reps Email]]
Product Exception	[[Course Name]] [[Login Address]] [[First Name]] [[Last Name]] [[Username]] [[Password]] [[Exception End Date]] [[Manager Email]] [[Reps Email]]	**Product Expiry Reminder**	[[Course List]] [[Login Address]] [[First Name]] [[Last Name]] [[Username]] [[Password]] [[Extension List]] [[Manager Email]] [[Reps Email]]
Training Expiry Reminder	[[First Name]] [[Last Name]] [[Username]] [[Password]] [[Login Address]] [[Reps Email]] [[Training List]] [[Manager Email]]	**Certification Expiry Reminder**	[[First Name]] [[Last Name]] [[Username]] [[Password]] [[Login Address]] [[Manager Email]] [[Certification List]] [[Reps Email]]
Experience Log Approved	[[First Name]] [[Last Name]] [[Type Name]] [[Manager Email]] [[Reps Email]]	**Experience Log Not Approved**	[[First Name]] [[Last Name]] [[Type Name]] [[Manager Email]] [[Reps Email]]
Experience Log Manager Approval	[[First Name]] [[Last Name]] [[Type Name]] [[Manager Email]] [[Reps Email]]	**Curriculum Assets Reminder**	[[First Name]] [[Last Name]] [[Username]] [[Password]] [[Login Address]] [[Manager Email]] [[Asset List]] [[Reps Email]]
LMS Pre-set Text	[[LMS To]] [[LMS From]] [[LMS CC]] [[LMS BCC]] [[LMS Subject]] [[LMS Body]]		

11.5 Language



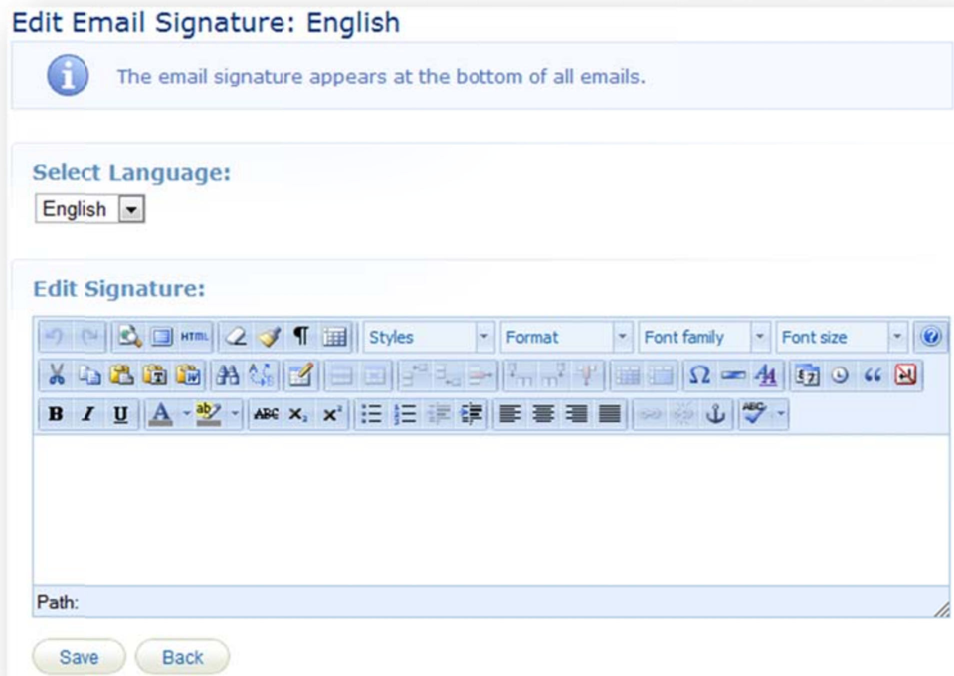
Use the drop down menu under the Options column to select the language of the email that you want to work in. When a new language is added to the system, the system will require all email notifications for the new language to be either disabled or configured. When a language is disabled, all notifications related to this language will also be disabled. The Site Manager must confirm that they wish to disable all notifications before this action will occur.

11.6 Signatures

Click on the edit signature link in the email tools menu on the right to open the Edit Email Signature page. The Edit Signatures link can be navigated to from Control Panel>Emails for LMS default signatures or from Users>Campuses for campus signatures.

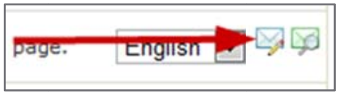
- **Select Language** – Select a language from the dropdown for your email.

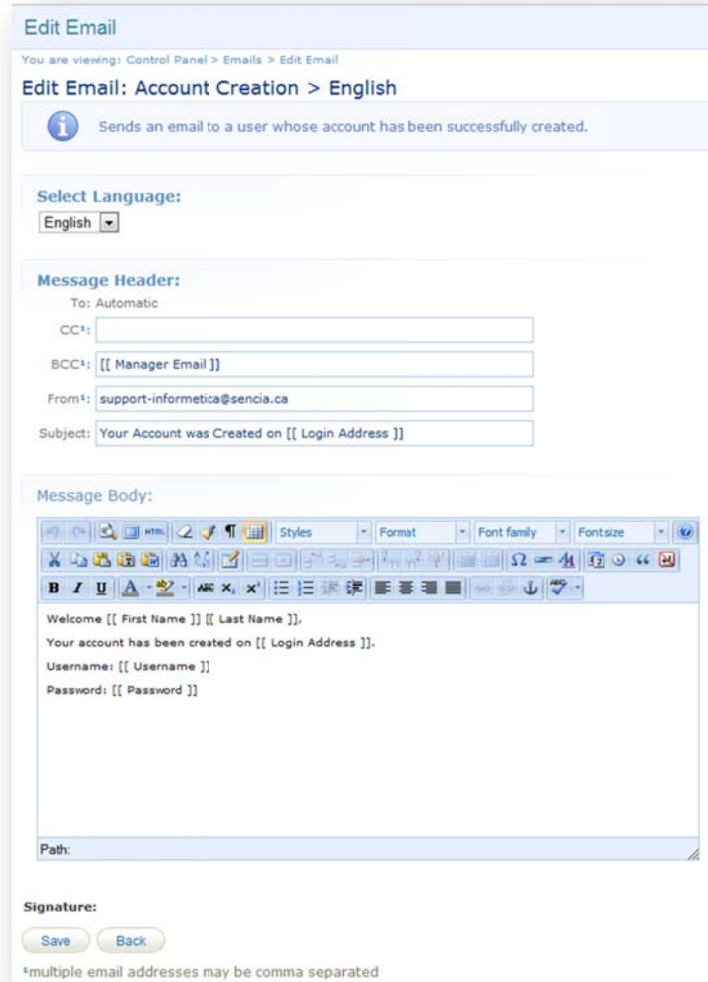
- **Edit Signature –** Enter the text for your signature in the publishing window and format with the publishing tools. You can also add any desired pre-set text into the signature.
- **Save** and click the emails link on the right to return to the main emails page.



11.7 Message Content

Click the edit email icon  next to the email that you would like to edit to open the edit email page to set up the default text for your automated emails. You only need to set these up once and the LMS will take care of the notifications automatically.





Language

Use the drop down menu to select the language for this email, if applicable.

Message Header

- To: This field is set to Automatic so that it will be sent to all Participants. If this field is left empty, the email will not be sent.
- CC/BCC: If necessary, you can add email addresses to the CC and BCC fields. Multiple email address must be separated by a comma.
- From: Enter the email address which recipients should receive this email from. If this field is left empty, the email will not be sent.
- Subject: Enter the subject line for the email message. If this field is left empty, the email will not be sent.

Message Body

Enter text for the message in the Publishing Window and format with the Publishing Tools. You can also add any desired pre-set text into the email message.

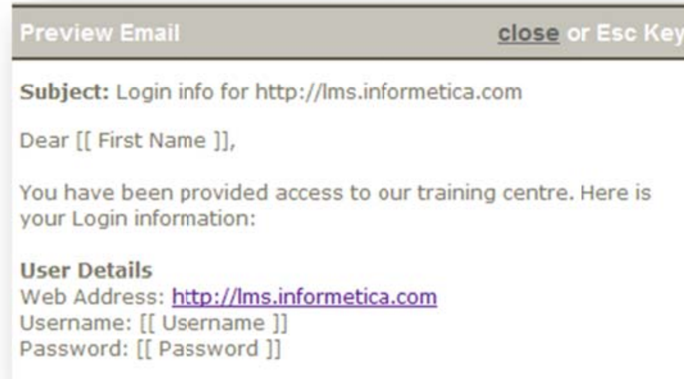
Save your message when you are done.

Mandatory Fields

To, From, Subject and Message Body fields must be filled out or the notification will not be sent.

11.8 Preview Emails

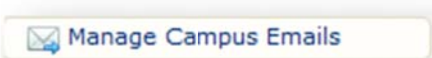
Click the preview email icon next to the email that you would like to edit to open the preview email page. A window will open with a preview of the email subject and body. Once you are done previewing, click the close link or press the Esc key to return to the emails page.



11.9 Disable Emails

The only way to completely disable or enable emails for your entire system is to call a Sencia Administrator and ask to have the specific email enabled or disabled. However, Site Managers have a number of options for disabling selected emails locally:

- **LMS Default Emails**: If Site Managers have a system wide email active but only want it enabled at the campus level, not as a LMS default email, they can disable it simply by leaving any of the following fields empty: To, From, Subject or Message Body. These fields must be filled out for the notification to be sent out. To disable campus emails:
- **Campus Emails Option 1**: If you do not wish to have a specific email sent at the campus level, you can simply make sure that the Send Email check box is not checked. Navigate to the campus emails and then click the add/edit emails button to open the Manage Campus Emails page and uncheck the Send Email box to disable the emails.
- **Campus Emails Option 2**: Alternatively, you can navigate to the Emails page via the Control Panel and click the Manage Campus Emails link. Find the emails you wish to disable (you can use the filter options to help you find them) and then use the Status drop down menu to make the emails inactive.



Disabled Campus Mail

Once emails for a campus emails are enabled, the campus settings override the LMS email settings. Therefore if you disable a campus email, no email is sent.

11.10 Appended Text

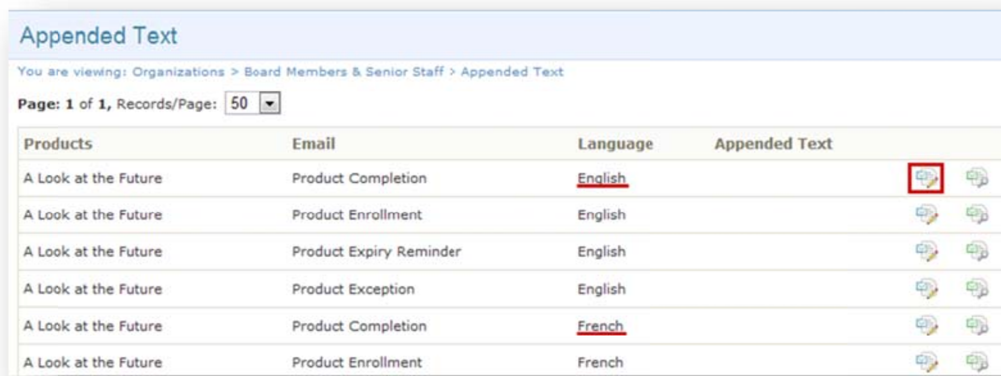
Appended text is an optional configuration that may be available on your system for select email notifications. Appended text is available at the campus level and can be added to any activated product email notification based on a specific course and language. Appended text will show up after the email body content, but before the signature if you have one set up. Appended text is often used to automatically email a user detailed instructions about a Product, such as reporting to their supervisor when the Product is completed. The feature is useful for instructions that are not needed by everyone taking the course, but only for the specific Campus. This feature is available for the following email notifications: Product Completion, Product Enrollment, Product Exception, and Product Expiry Reminder.

Mandatory Fields for Appended Text

Appended text counts as body text, so even if you have no other body text entered, the email will still be sent as long as the To, From and Subject fields are filled out.

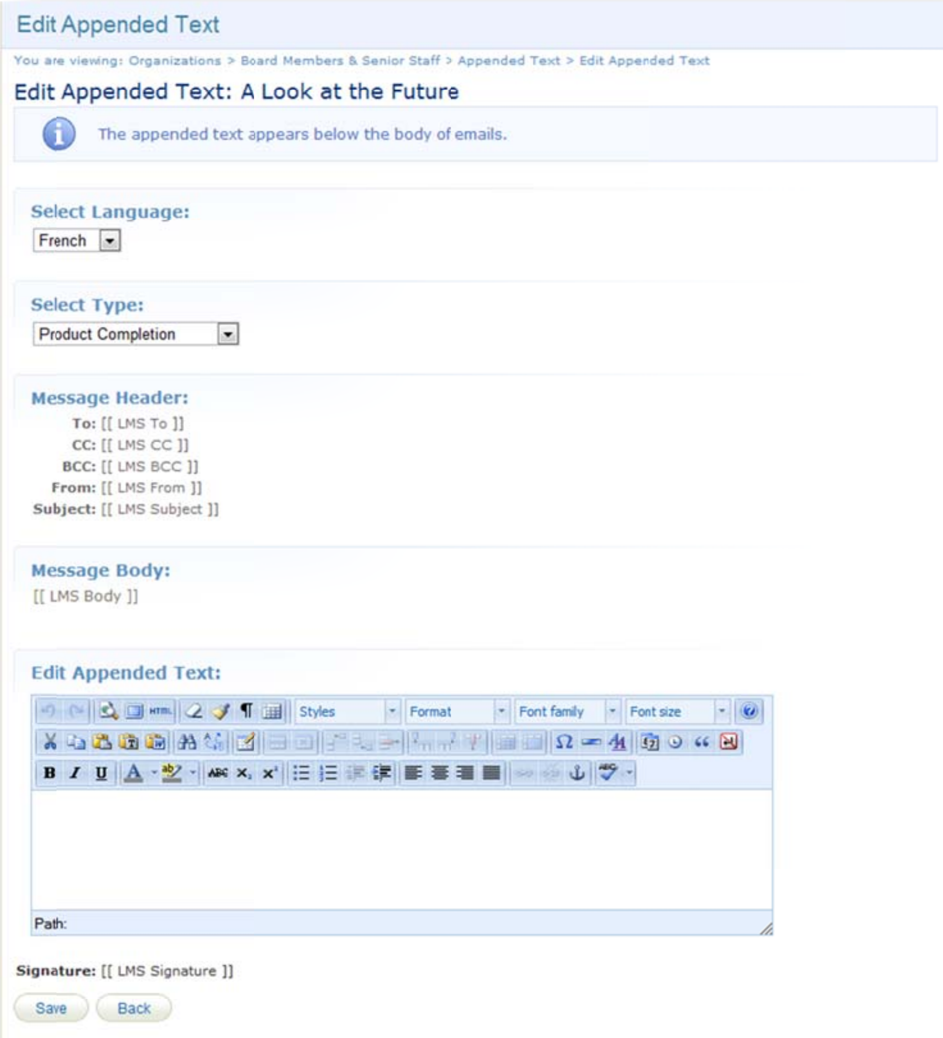
11.10.1 Navigating to the Appended Text Feature

Click the Users tab from the main navigation bar and select the Campuses link. From the campus page, click the Edit Emails button from detailed view or the Edit Emails icon from list view for the Campus of your choice. This will open the Manage Campus Emails page for the campus you selected. Click the Appended Text link from the right hand side to open the Appended Text page.



11.10.2 Setting up Appended text

From the Appended Text page, select the Product, email notification and language you want to add the text to. Each Product is listed once per email and language. Click the Edit Appended Text button next to the appropriate course selection.



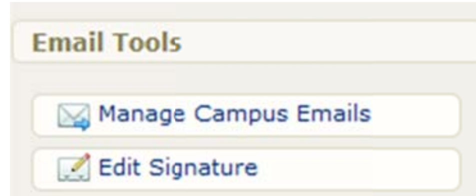
Use the Publishing Window to design the text and save. The appended text will show up after the email body content, but before the signature, if you have one set up. After you save, the appended text will appear on the Appended Text page.

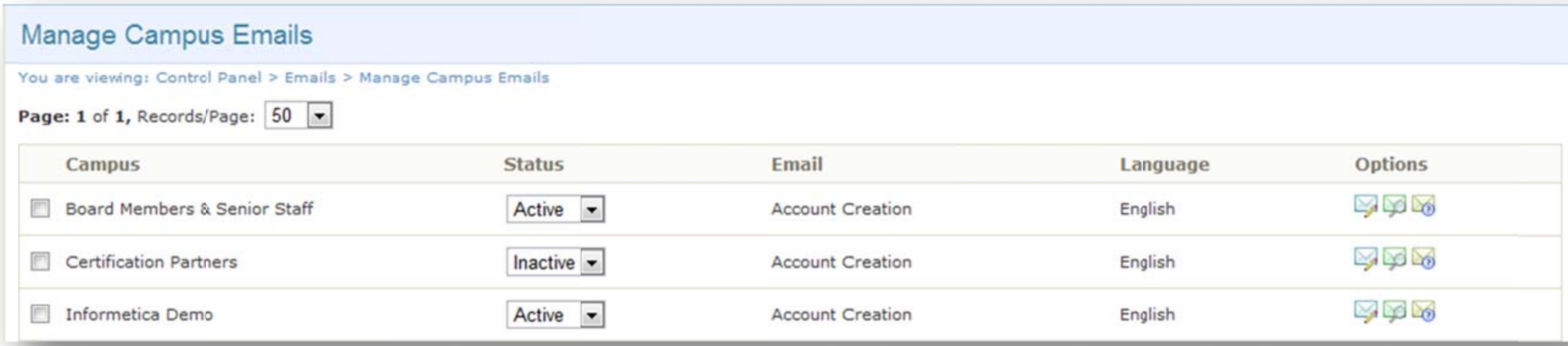
Preview the Email

If Appended Text has already been set up, you can click the Preview Appended Text button to see the Product email notification as well as the appended text added to it.

11.11 Managing Multiple Campus Emails

Site Managers can manage multiple campus emails at once using the Manage Campus Emails tool. Navigate to the Control Panel and then click the Emails link to open the emails page. Click the Manage Campus Emails link in the Email Tools menu on the right. Single campuses can be managed from here, as well, by using the filter tool or navigating to the appropriate campus in the list. The Manage Campuses Emails page is organized by listing each campus on a line dedicated by the specific email notifications available to them. The screen shot below shows four campuses, but is filtered to show only the Account Creation email in English. You can return to the LMS emails or preview the email descriptions at any time from the Tools menu.

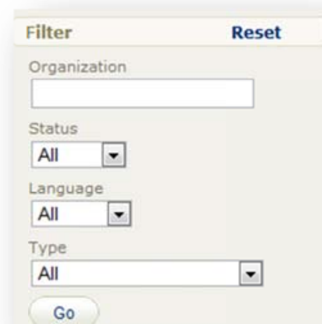




11.11.1 Sort and Filter Multiple Campus Emails

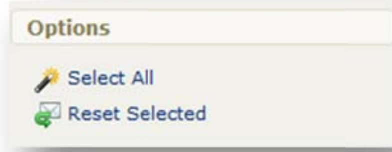
To change the order in which the emails are displayed, use the sort menu to alphabetically sort by campus name or by email name (ascending or descending). To show only specific emails, use the filter menu options detailed below:

Reset – Choose reset to remove any filter options.
Campus – Enter a word in the campus name and then click “Go".
Status – Use the drop down menu to show only active or inactive emails and then click "Go".
Language – Use the drop down menu to show only emails using a specific language and then click "Go".
Type – Use the drop down menu to show only the emails with a specific name and then click "Go".



11.11.2 Reset Multiple Campus Emails

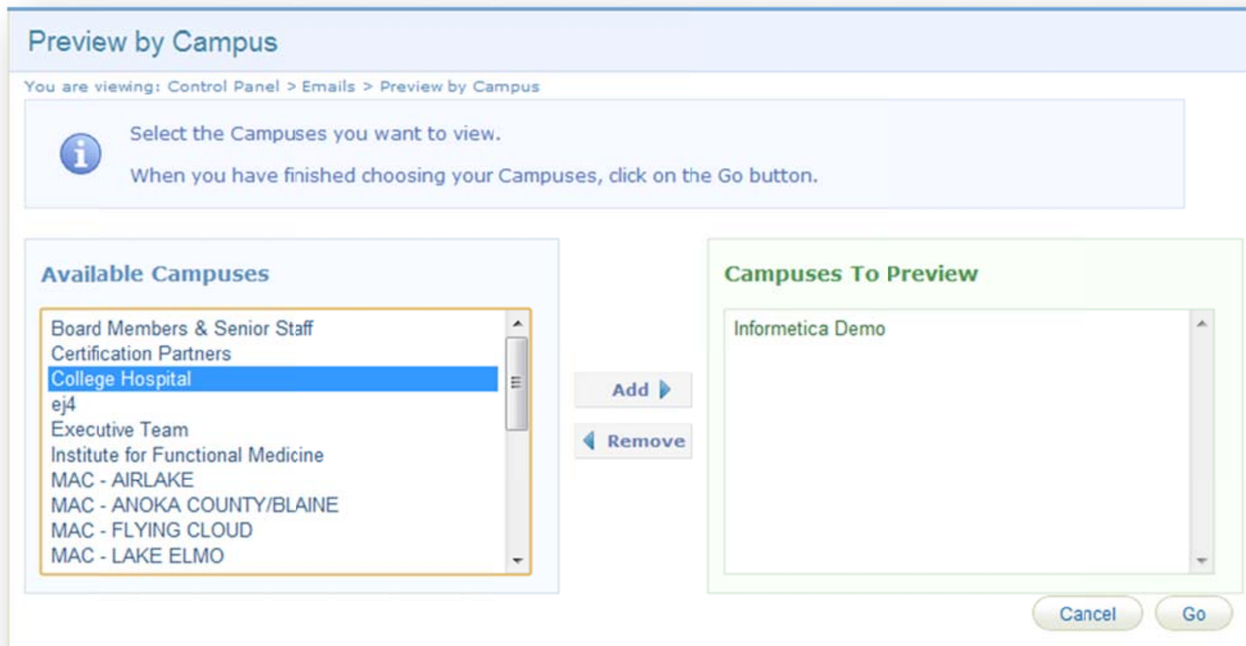
Resetting selected emails will remove any of the custom edits that have been made to the selected emails and return them to the LMS defaults. To reset notifications, select the notifications to reset and then click the “Reset Selected” link under the Options menu. You can select the email notifications using the check boxes at the far left or by using the “Select All” tool on the right under the options menu.



11.11.3 Preview Multiple Campus Emails

Preview All Emails: Select the “Preview All” link under the Tools menu to view what all of the campus emails look like.

Preview by Campus: Select the “Preview by Campus” link on the right under the Tools menu to view a printable list of specific campus emails.



Select the campuses that you would like to preview emails for from the Available Campuses list on the left. Hold the CTRL key and click to select multiple campuses. Click “Add” in the center to move your selections to the Campuses To Preview box on the right. Click “Go” to preview the selected campus emails.

11.12 Email Example Text

This area provides some example text for writing your own emails. One example per each type of notification is provided below. Feel free to copy and paste them into your own emails and tweak as needed.

11.12.1 Email Signature

Thank you,
company name
contact information
Course Administrator

This e-mail (including any attachments) is intended for the addressee(s) stated above only and may contain confidential information protected by law. You are hereby notified that any unauthorised reading, disclosure, copying or distribution of this e-mail or use of information contained herein is strictly prohibited and may violate rights to proprietary information. If you are not an intended recipient, please return this e-mail to the sender and delete it immediately hereafter. Thank you.

11.12.2 Account Creation

Subject: Welcome to the company email Learning Management System

To access your e-Learning course, please click this link system login page and enter the username and password provided below. We recommend that you change your password once you are in the system.
Username: [[Username]]
Password: [[Password]]

Should you have any questions, please contact company email or call company phone.

11.12.3 Account Locked

Subject: Your account is locked for security reasons

We apologise for the inconvenience. For your security, user accounts are locked automatically if the password has been entered unsuccessfully too many times. Your account will unlock automatically and be available in 1 hour. ===Alternative text=== We apologise for the inconvenience. For your security, user accounts are locked automatically if the password has been entered unsuccessfully too many times. Contact [[Helpdesk Contact]] to have your account reinstated.

11.12.4 Certification Complete

Subject: Certification Completed

Congratulations, [[First Name]] [[Last Name]], you have completed the following certification: [[Certification Name]] on [[Certification Obtained Date]] Should you have any questions, please contact company contact information.

11.12.5 Product Completion

Subject: Course Completed

Congratulations on successfully completing [[Course Name]]! Don't forget to print your certificate of completion for your training records. To do so, log back into the course and click on the Certifications tab. Please contact company email or call company phone if you have any questions.

11.12.6 Product Enrollment

Subject: Course Registration

You have been registered in the following course: [[Course Name]]. To begin your training:

- Go to system login page and log in with your username and password.
- Click on the course title in the left side-bar menu to access the online training you registered for or are required to participate in, and begin.

We hope you enjoy the course!

11.12.7 Forgot Password

Subject: Training Centre Login Information

Hello [[First Name]] [[Last Name]],

Here is your login information for the company name Training Centre.
Your Password is: [[Password]]

Please contact [[Helpdesk Contact]] or call phone if you have any questions.

11.12.8 Product Exception

Subject: Course Date Extended

[[First Name]], your [[Course Name]] online course has been extended until [[Exception End Date]].
To access your online training, log in to system login page with your username and password.

Please feel free to contact us with any questions or concerns at company email or company phone.
Thank you and we hope you enjoy the course!

11.12.9 Product Expiry Reminder

Subject: Course Expiry Reminder

Greetings from the company name team.
This is a friendly reminder to complete the following course(s) prior to the expiry date.

[[Course List]]

If you require assistance, you can email us at [[Helpdesk Contact]] or call phone.

11.12.10 Certification Expiry Reminder

Subject: Certification Renewal Necessary

Greetings from the company name team.

We are providing you with notice that the following certification(s) will soon expire:
[[Certificate List]]
Ensure that you renew your certificate prior to the expiry date to avoid any compliance issues.

If you require any assistance, please contact your supervisor.

11.12.11 Training Expiry Reminder

Subject: Training Expiry Reminder

Greetings from the company name team.

We are providing you with notice that the following training item(s) will soon expire:
[[Training List]]
Ensure that you renew your training prior to the expiry date to avoid any compliance issues.

If you require any assistance, please contact your supervisor.

11.12.12 Experience Log Approved

Subject: Congratulations! Your Experience for Level [[Level #]] has been approved.

Congratulations! Your application for Experience Level [[Level #]] has been approved Login and go to My Experience tab to print your certificate. You may now begin creating a new record for the next Experience Level. If you require any assistance, please contact your supervisor.

11.12.13 Experience Log Not Approved

Subject: Your application for Experience Level [[Level #]] has not been approved

Your application for Experience Level [[Level #]] has not been approved Please login and go to the My Experience tab to see why the application was not approved and what changes and/or updates need to be included before you resubmit it. If you require any assistance, please contact your supervisor.

11.12.14 Experience Log Manager Approval

Subject: Experience Log application submitted for your approval

A staff member has submitted an Experience Log for you to review for approval. Please log in at your convenience to assess the application

11.12.15 Curriculum Assets Reminder

Subject: Required Item(s) Expiry Reminder

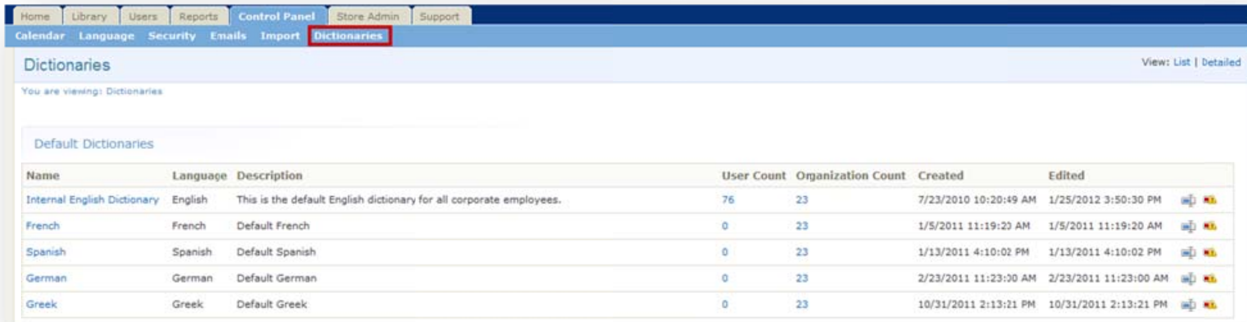
Greetings from the company name team. We are providing you with notice that the following item(s) are due soon: [[Asset List]] Please complete these items prior to the due date to avoid any compliance issues. If you require any assistance, please contact your supervisor.

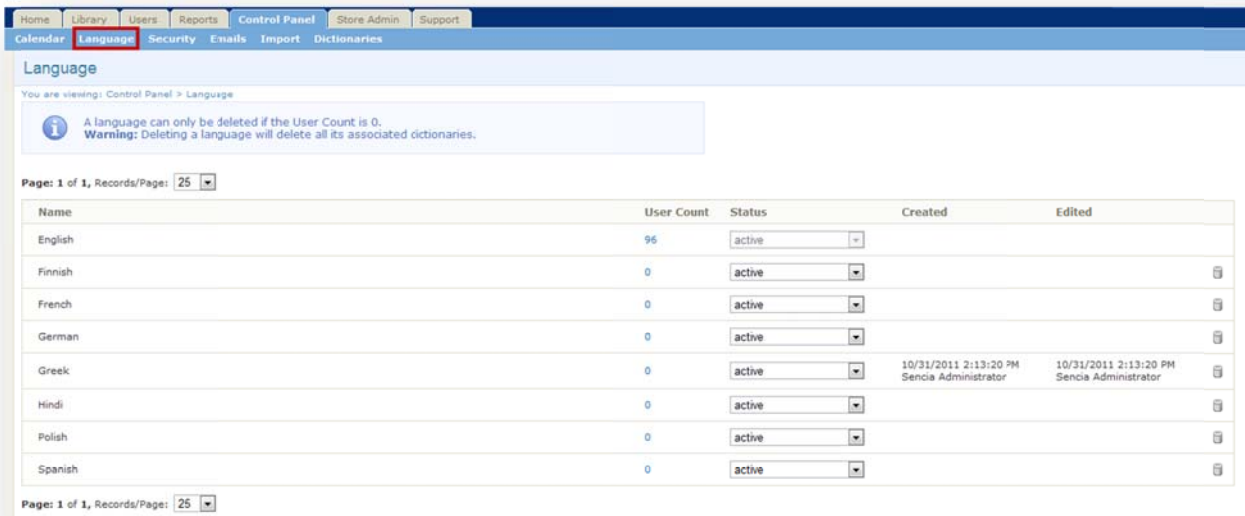
12. Languages, Dictionaries, and Labels

Informetica offers site managers the ability to create multiple languages (i.e., Francais, Español, etc.) for all system navigation and messages, as well as allows the end-user the ability to set their language preference. Multiple dictionaries in the same language can be set up as well to allow individual campuses to adhere to their own familiar terminology instead of adapting to terms the LCMS uses out of the box.

Topics Covered in this Chapter

Informetica offers multi-language support and can host content in any Roman-based language. Additionally, the LMS itself can be offered in several languages so that desktop users can view pages in the language of their choice. Site managers can add and edit languages as needed. Languages and dictionaries can be accessed via the control panel tab in the main navigation bar.





12.1 Create a Language

12.1.1 Summary of Steps

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

1

- **Create and Name the language:** Create a name for the new language (e.g. Español)

2

- **Create a new dictionary:** Make sure that at least one dictionary for the language is populated by entering the new language's terms into the dictionary labels.

3

- **Enter the labels:** click edit labels next to the new dictionary and change the labels into the appropriate language.
- You may want to export the English dictionary to csv first so that you can more easily translate the labels to Spanish or send the file off to someone else to translate (see CSV export later in this chapter).
- To export to CSV, open the English dictionary and click export to CSV on the Tools menu (see CSV export later in this chapter).

4

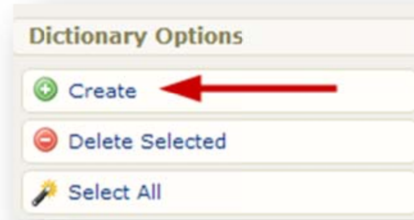
- **Assign dictionary:** Ensure that the dictionary is assigned to any organizations or specific users as necessary. For more information on assigning a dictionary, visit the organizations and/or user accounts chapters, respectively.

5

- **Set up notifications**: Enable and write any email notifications that you intend to use in the new language (Control Panel > Emails). By default all notifications for a new language are disabled, so you will need to configure any automated email notifications that you wish to use for the new language. For more information, visit the Email Notifications chapter of this manual.

12.1.2 Create a New Language

Click on the control panel from the main navigation and then select languages to open the language page. From the language page, click the create button in the language options column on the right side to open the create language page. Enter a name for the language and set the status to active or inactive. Click save to create the language and be taken to the manage labels page where you will set up the dictionary for this language or cancel to return to the language page without creating the new language.



On the manage labels page, enter the new term or the new language translation of the label into the value field. Do this for each label that needs to be displayed in the new language. To filter a list of just the labels that are not yet defined, click the link on the right, “show missing”. For more information on labels, see under the dictionaries entry. You can always save your work and return to updating the labels later via the control panel (see more below).

Once you click “Save and Finish”, a prompt warn you that the site labels for the new language dictionary will be changed. You must click yes to confirm the changes and continue. After saving the new language, you will be brought to the dictionaries page.

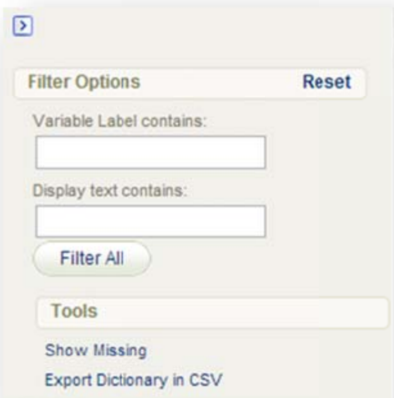
12.2 Manage Dictionary Labels

Informetica uses a number of labels within the system to display the names of features, links, and buttons to users. These are all customizable with your own terminology. You can translate the labels into another language for a foreign dictionary or use an organization's own internal terminology. After creating a new language, the system directs you to the manage labels page automatically, but you can always return to edit them later.

12.2.1 Filter Options

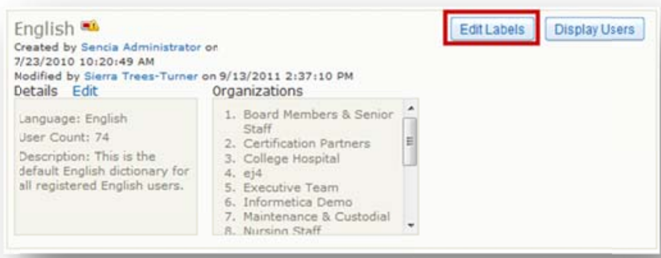
To find a specific label in the system, you can use the two filter options. Navigate to any dictionary to view the filter options. If you do not see the filter options to the right, then it may be hidden. Click the small arrow at the top right to show or hide the filter options.

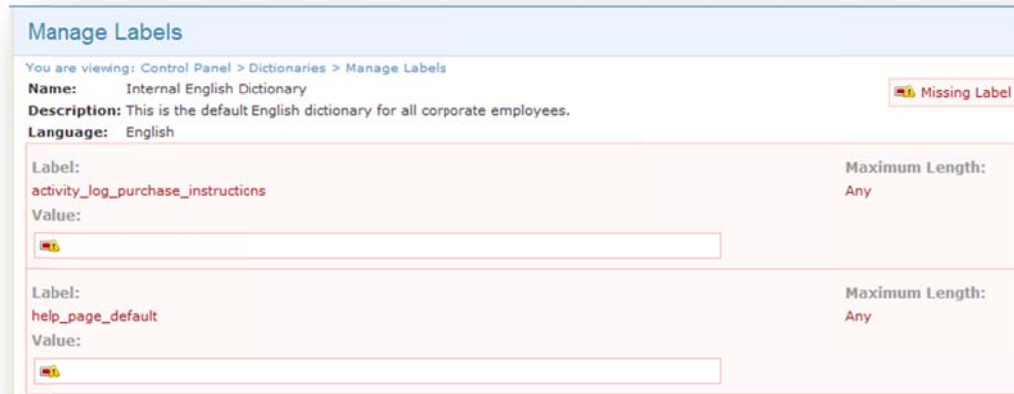
- **Variable label contains**: Enter a word that is in within the system label itself. For example, the label may be product_2. If you enter the term product into this filter, you get a list of labels containing the term product.
- **Display text contains**: Enter a word that is within the defined text for the label. For example, if you would like to your courses to now be called training, enter the term "course" into the filter to view a list of labels using the term "course", update them to display "training" instead, and then save.



12.2.2 Edit Labels for One Dictionary

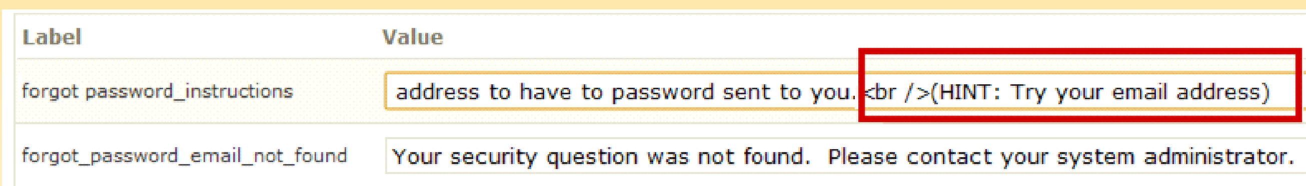
Select the edit labels button or icon for the dictionary that you would like to edit labels. This will open the manage labels page where you can enter the new term for the label into the value field for the corresponding label. Make sure to save at the bottom of the page when you are done. To filter a list of just the labels that are not yet defined, select the show missing link in the tools menu.



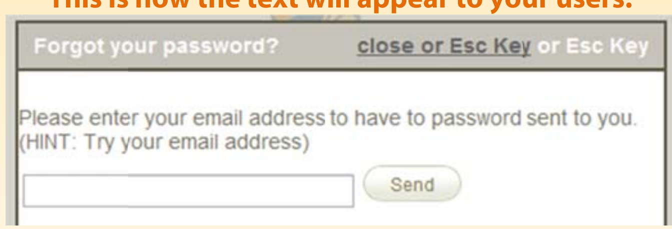


How to Place Text on Separate Lines

Use simple html code to place text on separate lines: add <br /> before the text you want to show up on another line.

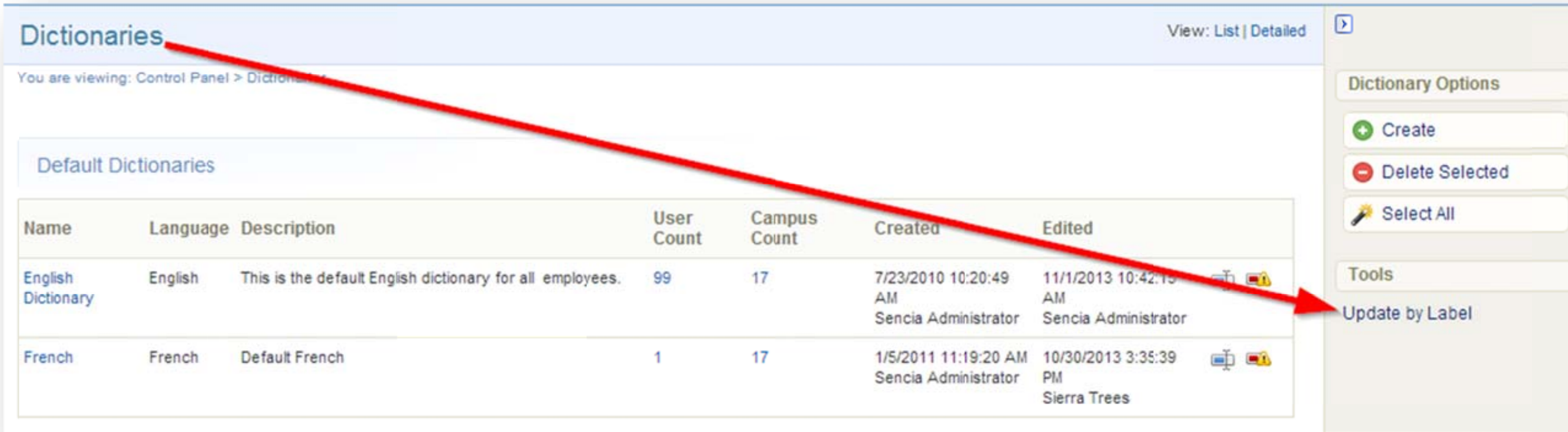


This is how the text will appear to your users:

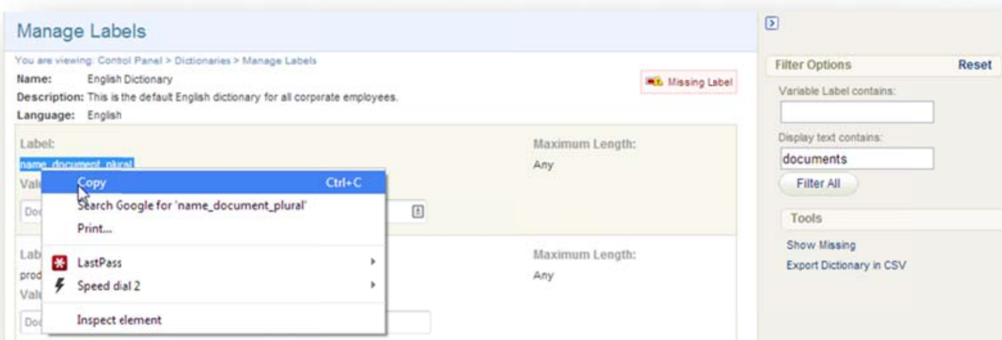


12.2.3 Edit Labels for All Dictionaries (Update by Label)

You can use the Update by Label tool to update labels for all dictionaries at once.

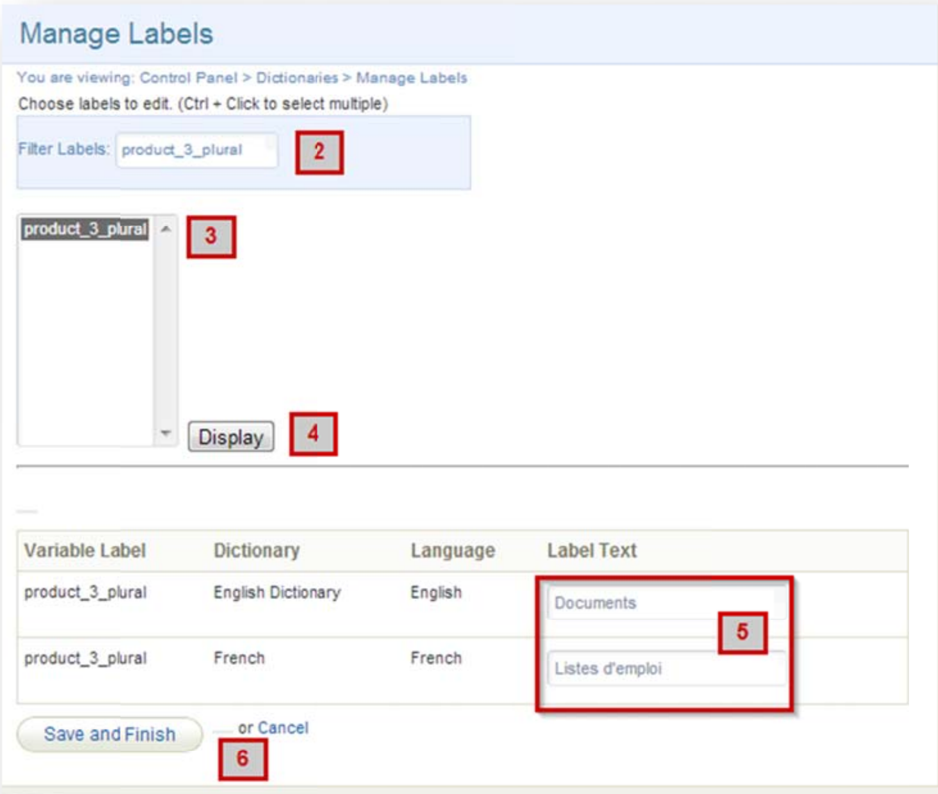


1. From the dictionaries pages, select the Update by Label link.
2. Enter the system label into the filter. A helpful way method is to use the filter tool in one dictionary to find the system label that you need to update, copy it, and then paste it into the filter for the update by label tool.



3. Click on the label in the filtered list of options
4. Click on the Display button

5. Edit the Label Text fields.
6. Click the Save and Finish button to commit changes.



Multiple Labels

If you have multiple labels to edit, you can use mouse + ctrl click or mouse + shift click to select more than one label in step 3. Remember to click the Display button to load the selected labels for editing.

12.2.4 Undefined Labels

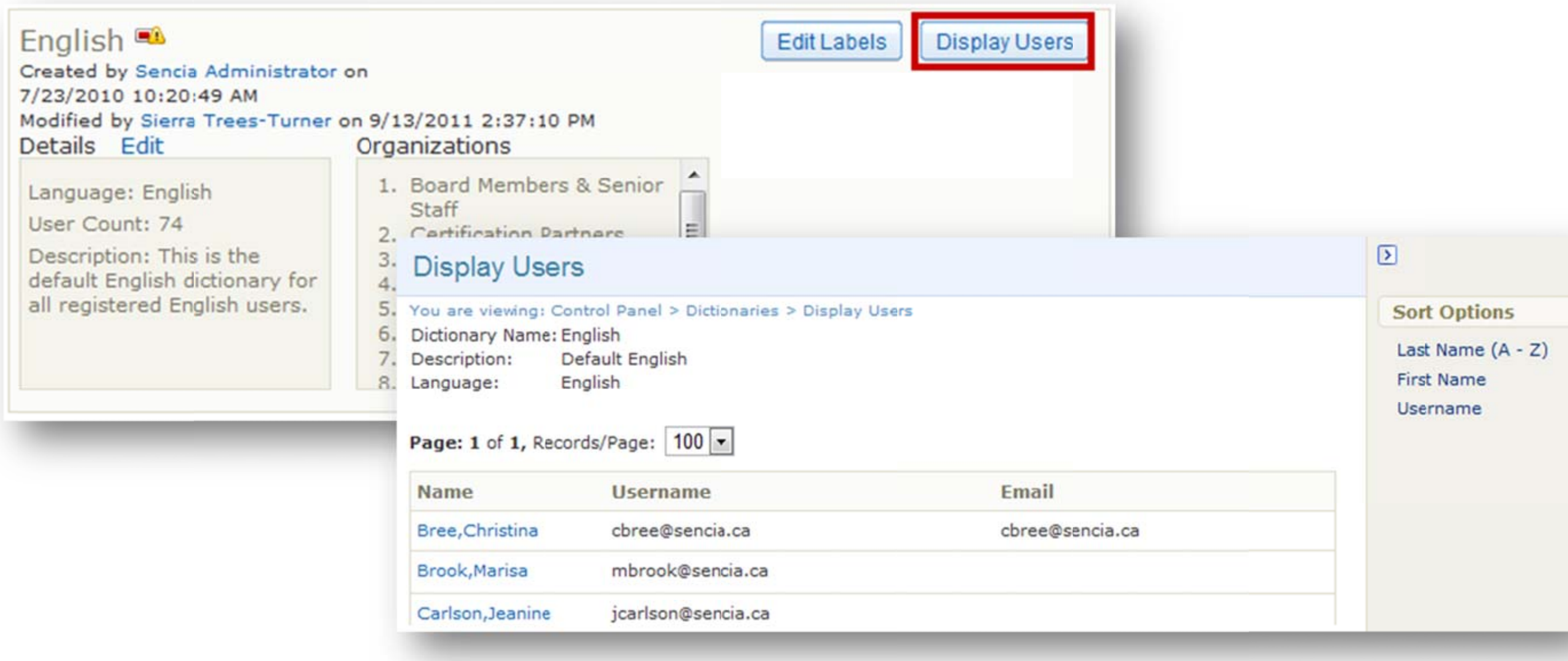
Missing labels mean that a dictionary has some labels without a text value associated to them. From the Dictionaries page, you can select the missing label identifier next to any dictionary to view missing labels, add text, and save them. Alternatively, if you have the manage labels page open for a specific dictionary, you can select the show missing link from the tools menu.

12.2.5 CSV Export

Navigate to any dictionary to view the export tool. You can export all of the labels and their defined display text into a CSV file, providing you with an offline review all of the terms within a dictionary. This can be particularly helpful when you are collaborating with other users or need to translate terms to another language. If you do not see the Tools menu to the right, then it may be hidden. Click the small arrow at the top right to show or hide the menu.

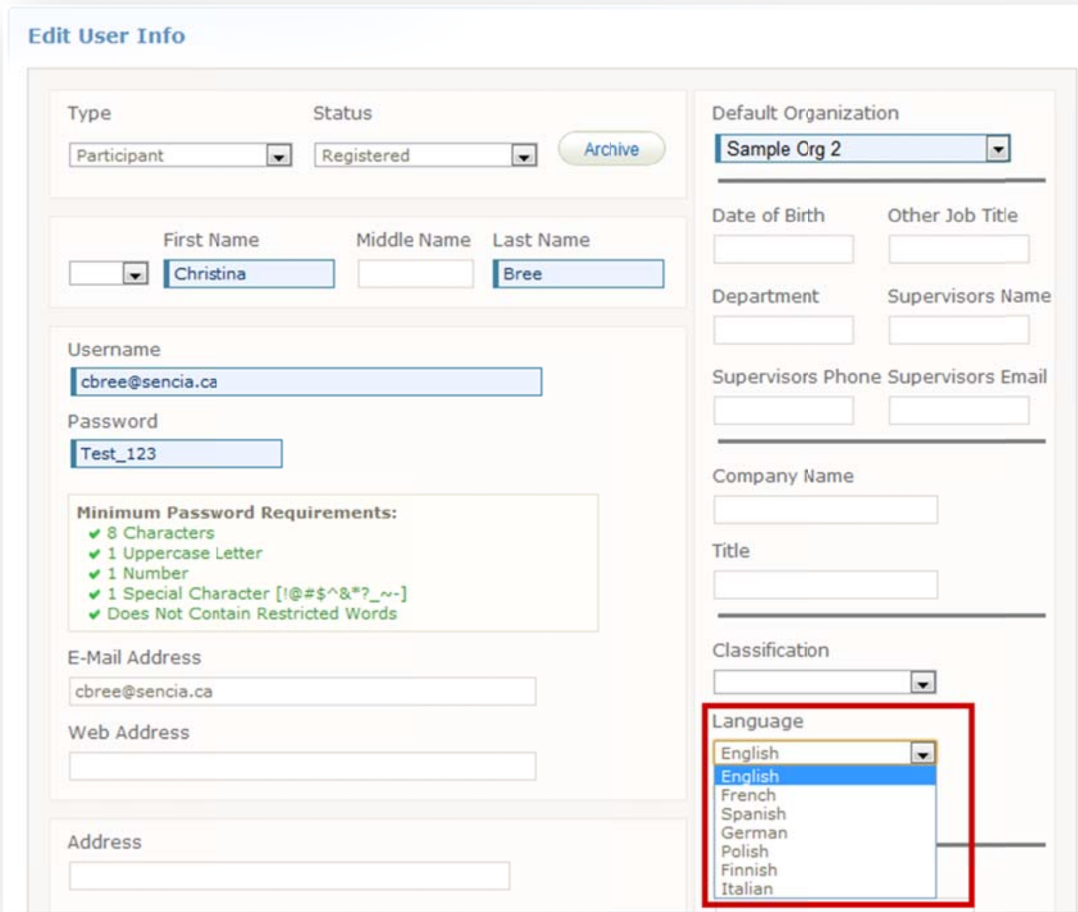
12.2.6 Display Users

To see a list of all accounts that make use of a specific dictionary, click "Display Users" from detailed view on the dictionaries page.



By default, the users are listed alphabetically by last name. To change the way the list appears, use the sort options menu on the right hand side to change the sort to last name, first name or username. All sorts are available in both ascending and descending order.

Click any user's name on the display users screen to open their edit user Info. From this page you can change the user's language to any language set up in your system using the language drop down menu.

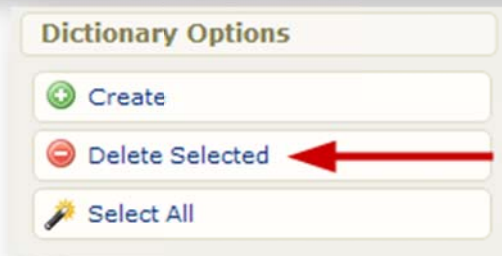


12.3 Edit Dictionary Name and Description

Click any dictionary's name on the dictionaries page to edit the name or description of the selected language dictionary. In the edit dictionary details screen, enter the new information in the name or description input field. Descriptions can be 255 characters long. Click "Save" to keep the changes or cancel to return to the dictionaries page without saving the changes.

12.4 Deactivate or Delete Dictionaries and Languages

To deactivate a language, use the drop down menu to change the status of the selected language to inactive. To permanently delete a default dictionary, you must delete the language itself from the Language screen. Only additional dictionaries can be deleted directly from the Dictionaries page. This can be done in the same manner as illustrated below, but from the dictionary page instead of the Language screen.



Languages and dictionaries cannot be deleted or be made inactive if there are any organizations and users assigned to the language. A site manager would first need to reassign an organization to another language and define a new language for these users within their profile before proceeding. There are two ways to delete languages:

- Select the languages you wish to delete by clicking them to highlight them in blue and the then press delete selected. This is the best method to delete multiple languages at once.

- Click the delete icon to the right of any language to delete a language one at a time. A prompt will appear to confirm that you want to delete the language.

Deleted Languages Affect Email Notifications

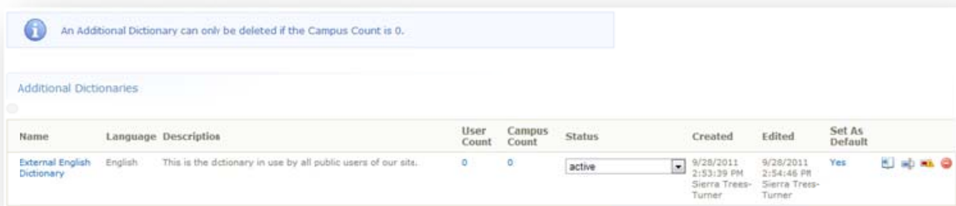
When a language is deleted or deactivated, then any automated email notifications related to this language will also be disabled.

12.5 Additional Dictionaries

You can create a new dictionary without creating a new language. These are called additional dictionaries. Additional dictionaries are used to provide an alternate set of terms for any language. One example of this is if you have both company users and public users, you may want to have an alternate English dictionary for these users so the internal users see terminology that is familiar to their own corporate environment and the public users see terminology that is relevant to them.

12.5.1 Default vs. Additional Dictionaries

For each new language that is created, there is automatically one default dictionary generated that you can customize. You may also create any number of optional additional dictionaries for a language. An organization must be joined to one of the dictionaries. This can be either the default dictionary or an additional dictionary, but never more than one. Organizations have only one dictionary per language, but users belonging to that organization can choose to view the system in any of the languages available. If a dictionary is not chosen for the organization, then the default language and its default dictionary will be automatically selected.



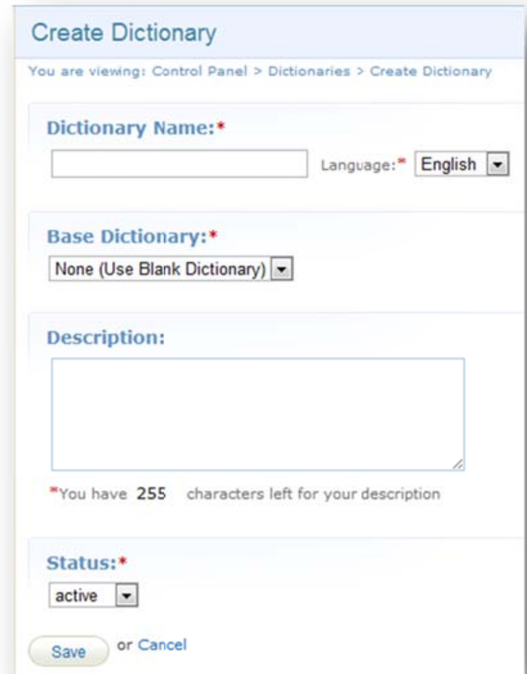
Can't Delete an Additional Dictionary?

Additional dictionaries cannot be deleted until organizations and users associated with the dictionary and are reassigned to a different dictionary.

12.5.2 Create an Additional Dictionary

From the dictionaries page, click the create button in the dictionary options menu. This will open the create dictionary page. Creating a new dictionary in this manner will create an additional dictionary (see more below).

Field	Description	Input
Name	Enter a name for the dictionary.	Required
Language	Select the language to link this dictionary to.	Required
Base Dictionary	Select an option from the drop down menu: • Select none (use blank dictionary) if you want to add new terms for all or most of the labels in this dictionary. • Select a specific dictionary from the drop down menu to populate the labels with those used in the selected dictionary. This is most useful when you want the majority of the labels to remain the same, but wish to change some of them.	Required
Description	Enter a description for the dictionary. The description can be a maximum of 255 characters.	Optional
Status	Set the status to active or inactive.	Required
Save	Upon saving, you will be brought to the manage labels page to update the labels to reflect your new language.	Required



13. Password Security

Site managers have full control of setting user password security settings for their Informetica system.

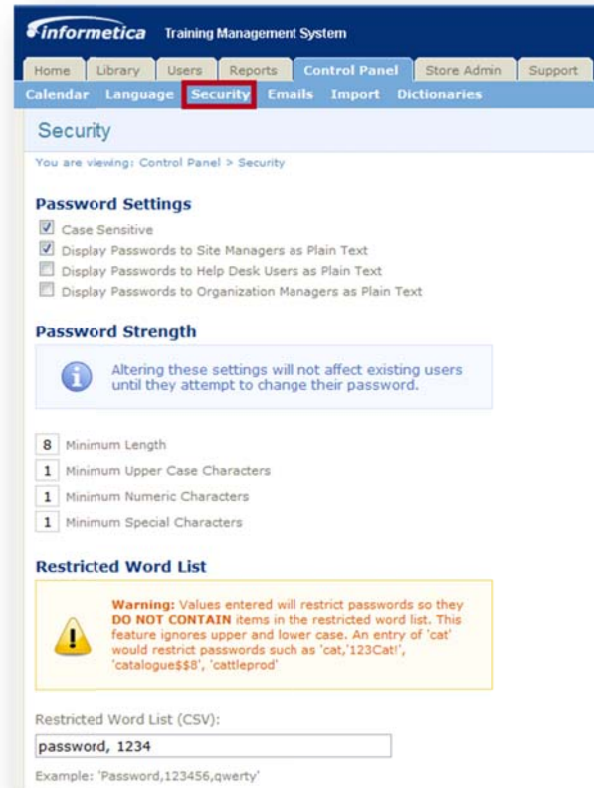
Topics Covered in this Chapter:

13.1 PASSWORD SETTINGS

13.2 PASSWORD STRENGTH

13.3 FORGOT OR CHANGE PASSWORD EMAIL OPTION SETTING

13.4 ENFORCE LOGON PASSWORD SECURITY



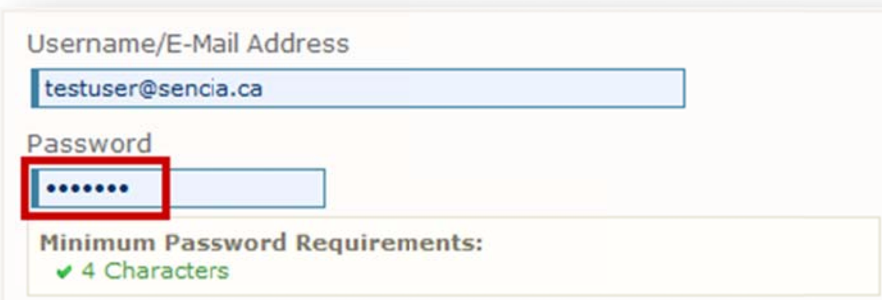
In the security area of the control panel, site managers can help secure access to their content by customizing the password settings. This includes requiring users to create passwords with a minimum length and other criteria to meet password requirements. When users create their passwords, they will need to follow the requirements that you set up.

If any security settings are altered to require a higher security, existing users will only be forced to update their passwords if the site is setup to enforce password security rules on login.

13.1 Password Settings

Case Sensitive - Select the check the case sensitive box to require that user passwords be typed in exactly. This would mean that if capital letters are used in a password, they would be required upon login instead of accepting both the capital and lower case versions.

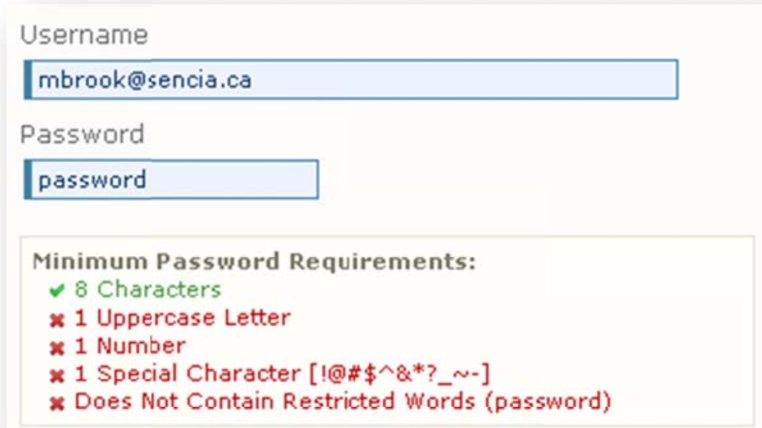
Display Passwords as Plain Text - Select the check box in front of any of the display password as plain text options to make passwords visible for those user types. Leave the box unselected to mask the password to that user type like in this example:



13.2 Password Strength

You can customize the requirements necessary for user passwords to strengthen the security for them. It is advised to balance the security of the password with consideration for the level of complication this will add for your users.

Password Minimums - Enter a minimum number into the field next to each selection for the password requirement.

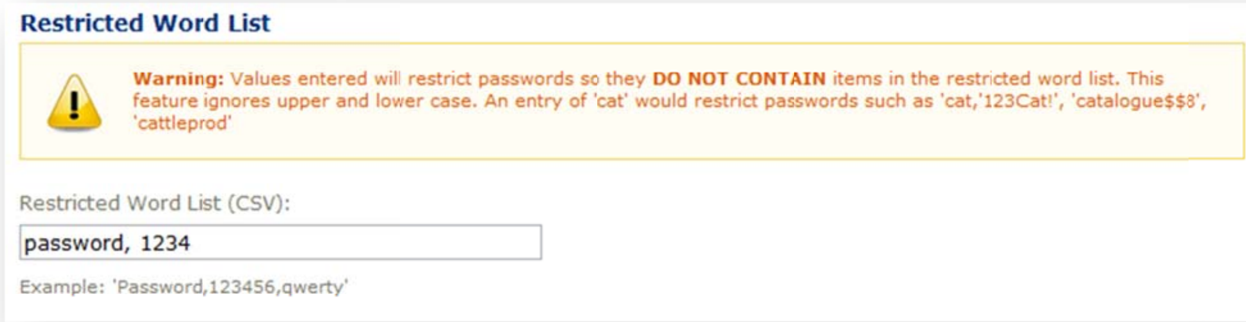


The minimum password requirements area in user details will indicate whether or not the password has met requirements. Only users who set their passwords up before the requirements were set will fail to meet the requirements.

Green lettering and a check mark ✔ 8 Characters indicate that the password meets the requirements as well as which requirements are met.

Red lettering and an X ✖ 1 Uppercase Letter indicate that the password does not meet the requirements as well as which requirements are not met. The example user above has a number of password requirements that are not met.

Restricted Word List - Values entered here will restrict passwords so they don't contain items in the restricted word list. This feature ignores upper and lower case. An entry of 'cat' would not let users create passwords such as 'cat,'123Cat!', 'catalogue$$8', 'cattleprod'.



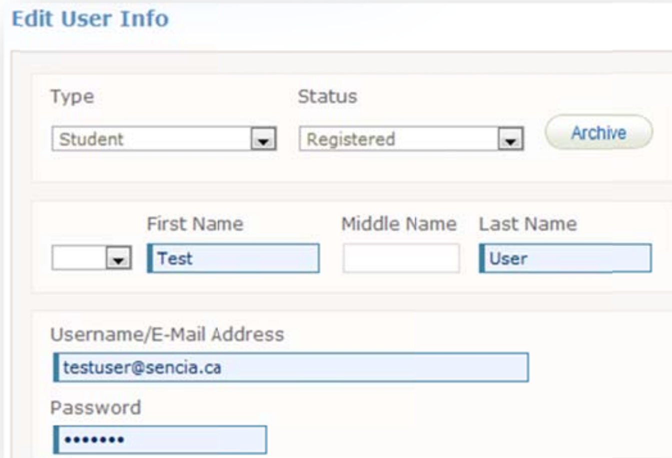
13.3 Forgot or Change Password Email Option Setting

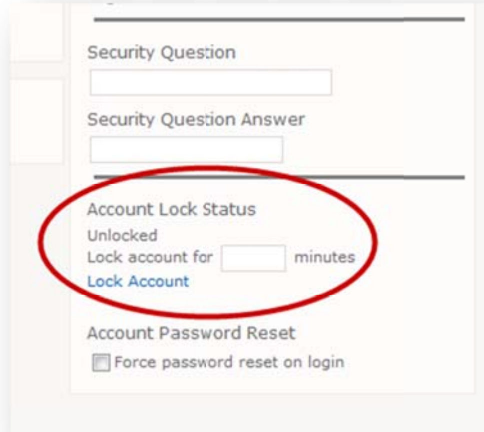
Users who fail at their attempt to log in several times in a row will be given a link. When a user clicks on the link, an email is automatically sent to their registered email address with information for logging in.

Change Password (Random) – Activate this option and the LMS will create a new random password for the user and email it to the email address on record.

Forgot Password – Activate this option and the LMS will send the user their current password to the email address on record.

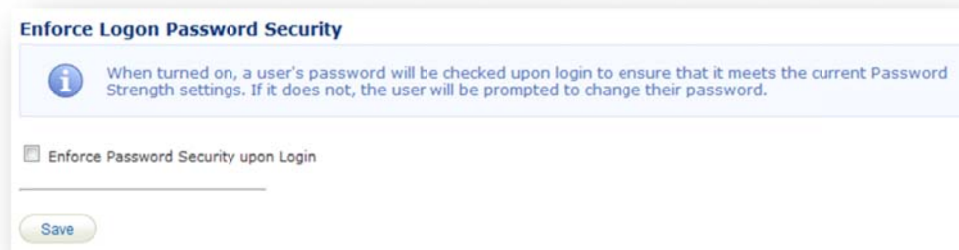
Your system may be configured to automatically lock a user out if they fail their log in attempts a specified number of times in a row. If this happens, you can unlock their account from the edit user Info screen. The number of log in attempts and the amount of time for the lock out are both variables that are configured during your system's original setup.





13.4 Enforce Logon Password Security

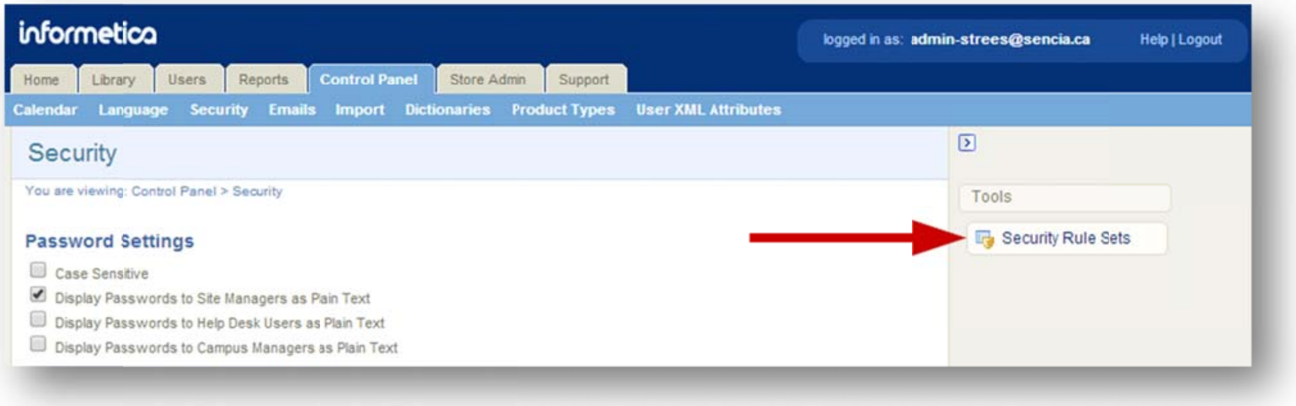
Selecting this option will force the LMS to check a user's password when they login to ensure that it meets the current password strength settings. If the password does not meet the requirements, then the user will be prompted to change their password.



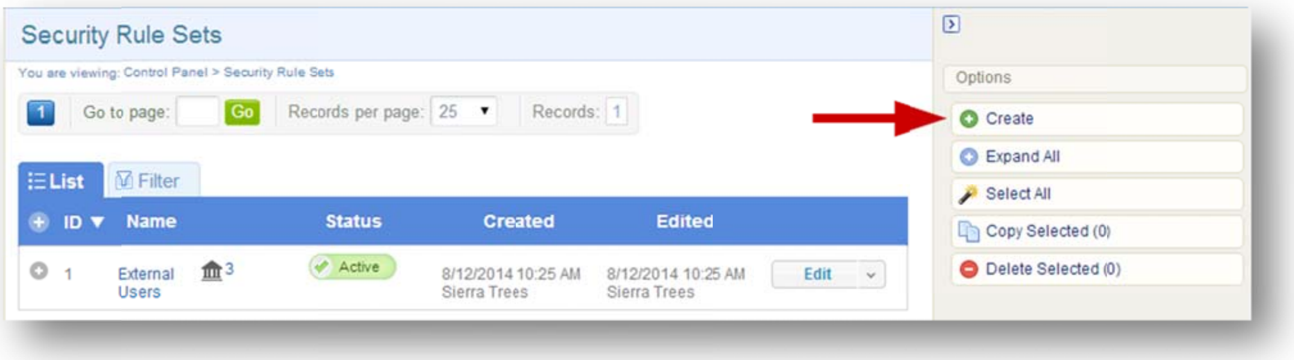
13.5 Campus-Level Security

If enabled for your system, you can customize the password settings and strength for specific campuses.

1. From the Security screen, select the **Security Rule Sets** button in the Tools menu.

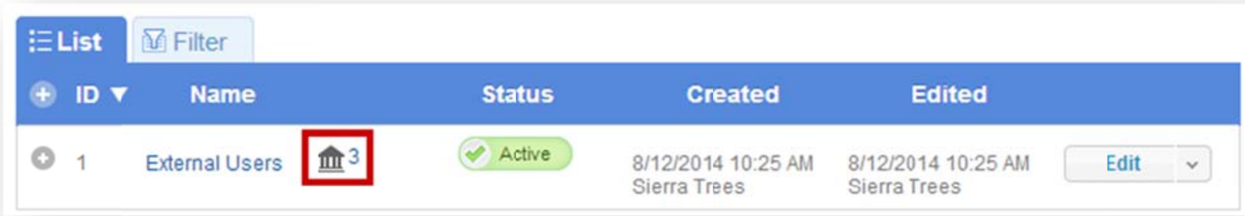


2. Select **Create** from the Options menu.

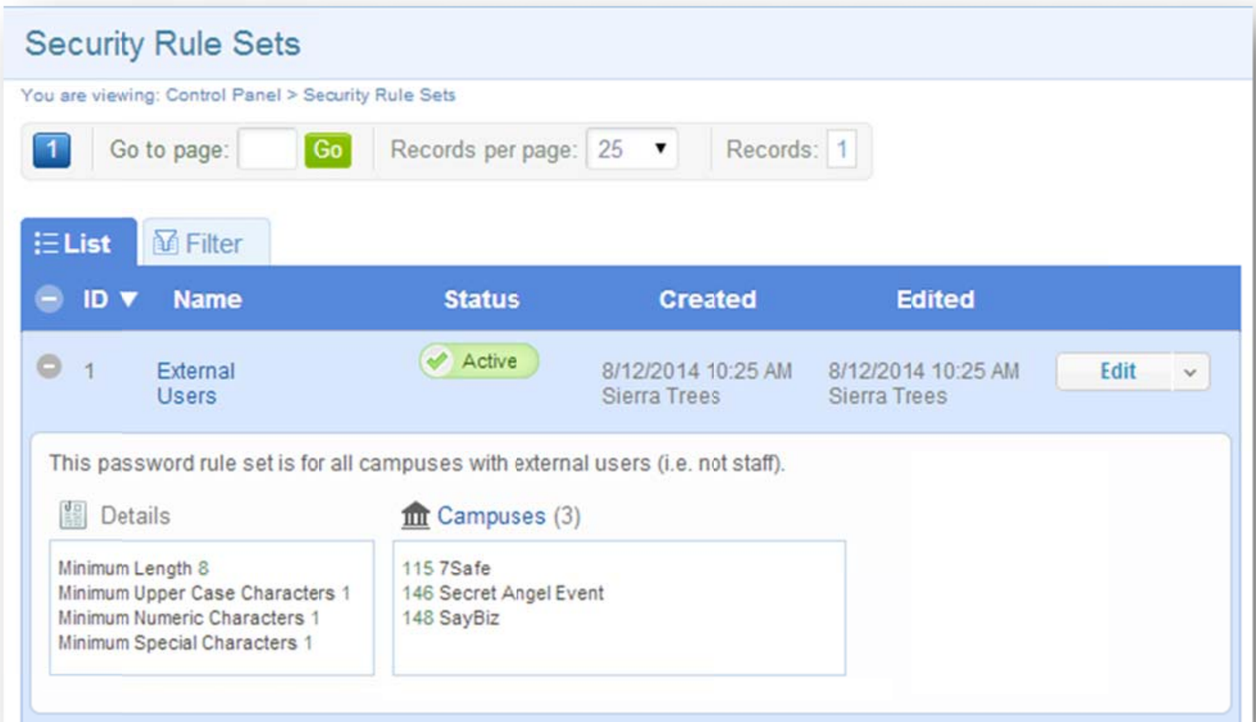


3. Define the password settings, password strength, and restricted word list, set the status to active, and then **Create**.

4. Now that the set is defined, return to the Security Rule Sets page to assign the set to specific campuses. Select the campus icon to open a new page where you can add or remove campuses to this set, and then **Save**.



5. Expand security rules sets to see at a glance what rules are defined and which campuses using the set. To expand, select the **+** or **Expand All** from the Options menu.



6.

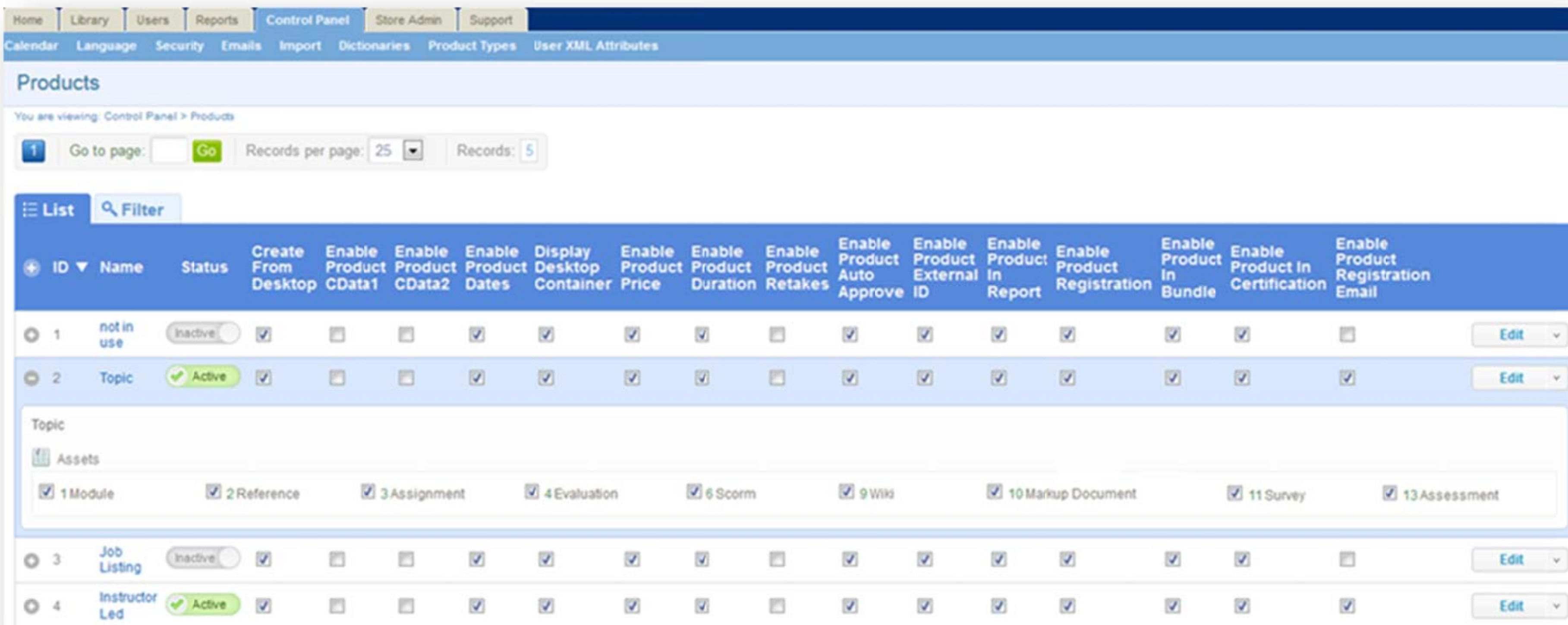
14. Product Type Management

This option is available to site managers

Up to 10 product types can be managed by site managers and are available system wide. Select the Control Panel and then select Product Types to open the product type management screen. From this page, you can create and edit the different product types and turn on or off the different asset types available for creation within each product type.

Active Product Types

Active product types cannot be isolated to specific campuses; however, you can opt to utilize a separate dictionary for campuses that wish to rename a specific product type.



14.1 Product Type Field Descriptions

Below is a brief description of the different fields available in the Control Panel > Product Types Management List. Enabling the various fields will allow course authors to use the fields when creating and editing the products.

Field	Description
Collapse/Expand	You can expand a product type to manage the assets assigned to it or collapse it to hide the assets.
ID	The system identifies up to 10 unique product types with an ID number. The ID number also identifies the label to define in the dictionary. For example ID 1 would be product_1 in the dictionary.
Name	The name of the product type (i.e. course, documentation, instructor led).
Status	Active: Only active products types can be used when creating new products. Inactive: An inactive product type is no longer available to users, is not available when creating new products, and is no shown as longer a separate container on home pages (for sites using this feature). Inactive product types are no longer visible in the product library.
Create From Desktop	Indicates if Products can be created of this type on the desktop by Publishers
Enable Product CData1 & Enable Product CData2	Indicates whether to expose the custom input fields on the Edit Details of Products
Enable Product Dates	Select this option to enable the Publishing Date fields.
Display Desktop Container	Select this option to make this product type appear in a container on the home page when logged in with non-site manager accounts.
Enable Product Price	Select this option to enable the Price field available in the product details.
Enable Product Duration	Select this option to enable the Expiry field.
Enable Product Retakes	Select this option enable Product Retakes.
Enable Product Auto Approve	Indicates whether Product Registration will require Approval or not
Enable Product External ID	Indicates if the External ID field will appear in a container on the Edit Details of Products
Enable Product In Report	Indicates whether the Product Type will be available within reports
Enable Product Registration	Indicates whether the Product will be available for Registration
Enable Product In Bundle & Enable Product In Certifications	Indicates whether the Products will be available in Bundles and Certifications
Enable Product Registration Email	Indicates whether the Product Registration Email is available for Products

14.2 Create a New Product Type

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

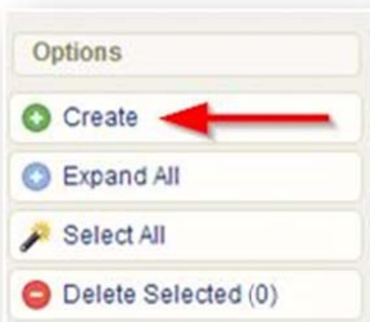
- ✓ Enable the product type fields
- ✓ Assign asset types
- ✓ Define dictionary labels

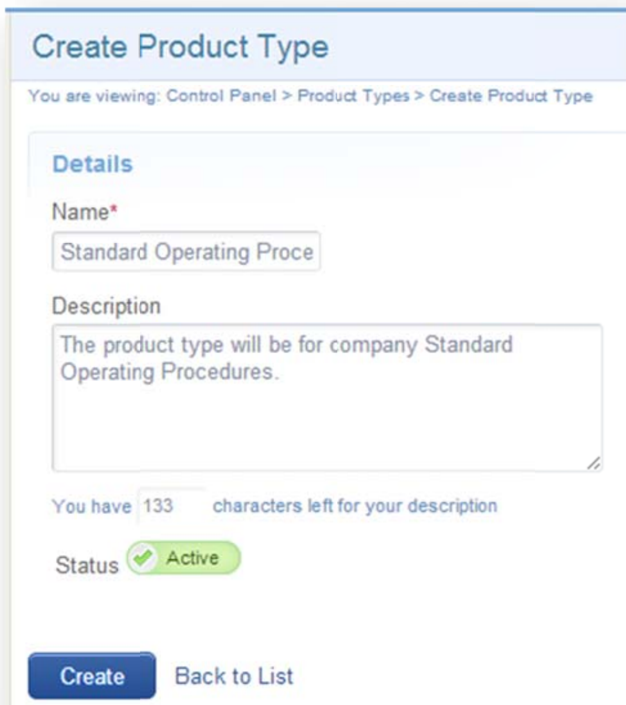
Select the Control Panel, select Product Types, and then select **Create** from the options menu. Fill out the form by giving the new product type a name, optional description and make it active or inactive. You can change these details at any time by selecting **edit** for any of the product types.

You will need to and to complete the set-up of a new product type.

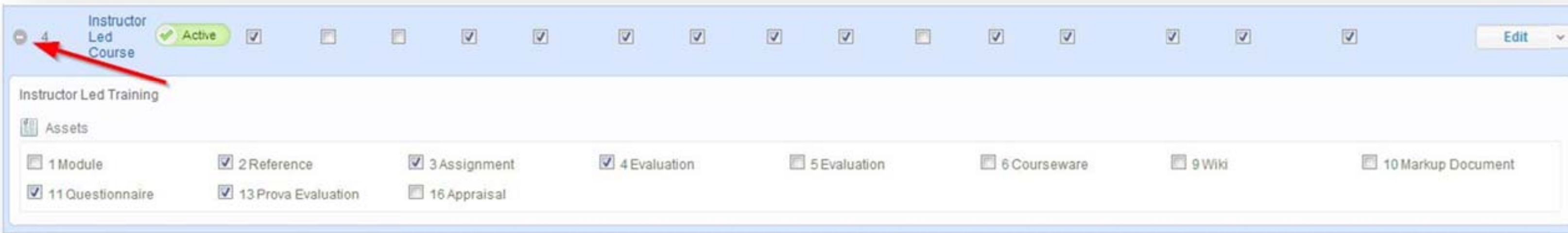
Product Types Must be Active

Only active product types can be used in the system.





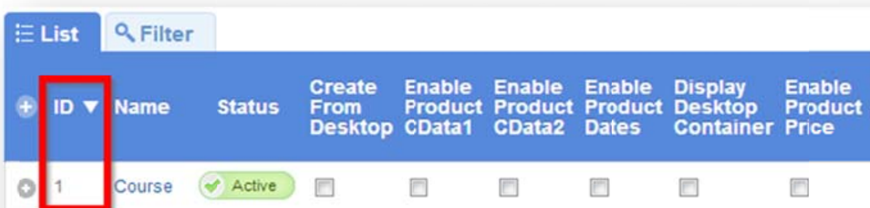
14.3 Assign Assets Types



Expand the product type and select any assets that you would like available for this product type. Inserting a checkmark beside a particular asset type will let you create those assets within the given product type.

14.4 Define Product Type Labels

When creating a product type, you will need to define the corresponding labels within Informetica's dictionaries. The ID number on each product type identifies the label to define in the dictionary. In the example below, the ID is 1, so the variable label product_1 is defined as Course.



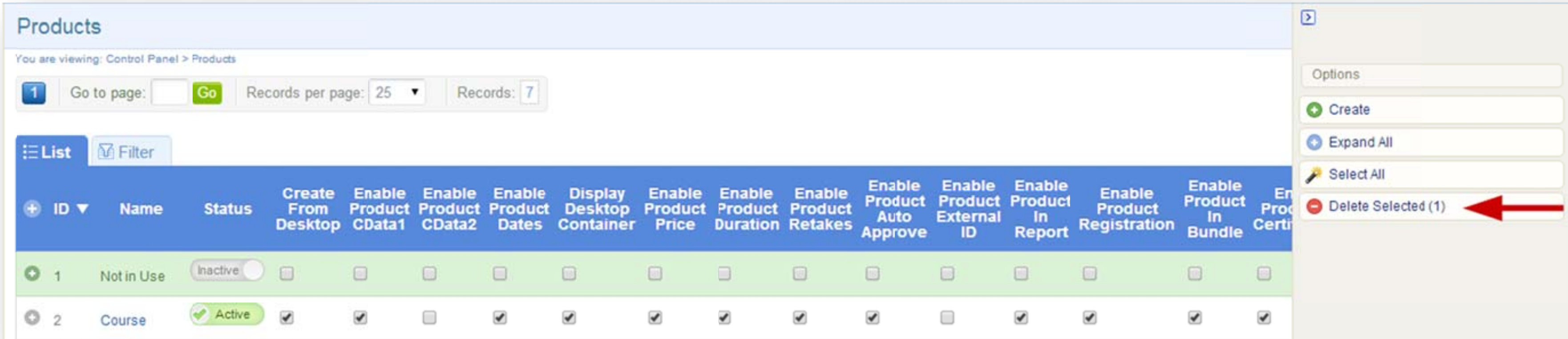
The variable label names are as follows:

- product_1, product_2, … , product_10
- product_1_plural, product_2_plural, … , product_10_plural

For more information on how to define dictionary labels, please see the Languages and Dictionaries chapter of this manual.

14.5 Delete Product Type Labels

Select the Product Types you wish to delete, and then select **Delete** from the options menu.



You can only delete product types that have no products attached to them. The deletion tool notifies you that the product type cannot be deleted if you try to delete a product type with products attached.

Deletion Restriction

You can only delete product types that have no products attached to them.

15. 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

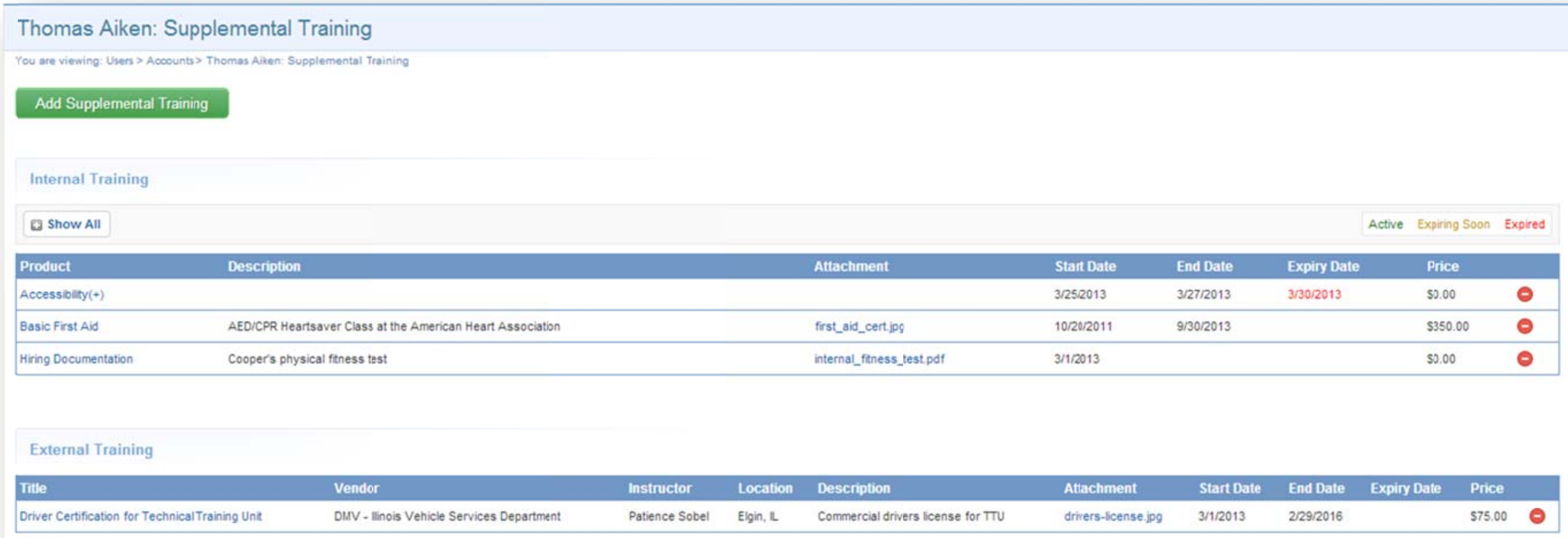
3
- Enter any associated costs for both internal and external training

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.



Brief description of the fields

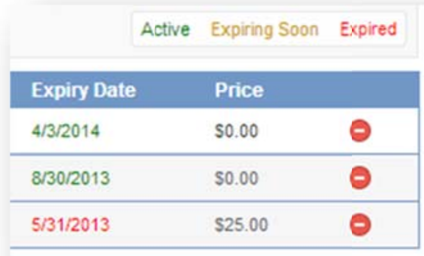
Field	Description
Product	The title of the product this training is associated with.
Description	A description of the supplemental training record.
Attachment	Optional supporting document (i.e., receipts, copy of driver license) that is attached to this specific training item. Attachments can be viewed 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.

15.1 Supplemental Training for Individual Users

This feature is available to Site Managers, Campus Admins, Campus Managers, and User Group Managers, depending on system configuration.

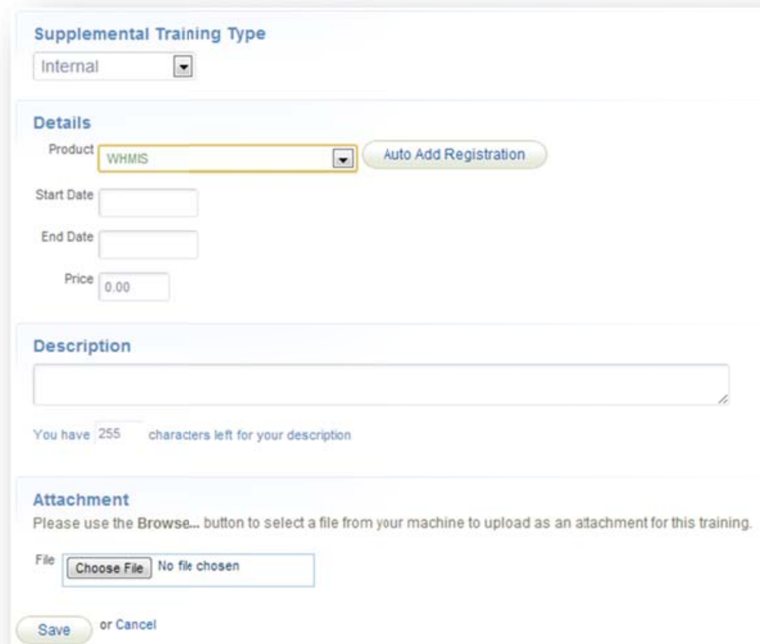
Select the Users tab, open any user account, and then select **Supplemental Training** from the Sections menu.

Training expiries are colour coded, based on their active status in the system.
Active (green) Expiry is greater than 60 days from today
Expiring Soon (yellow) Expiry is less than 60 days from today
Expired (red) Expiry is date is after today

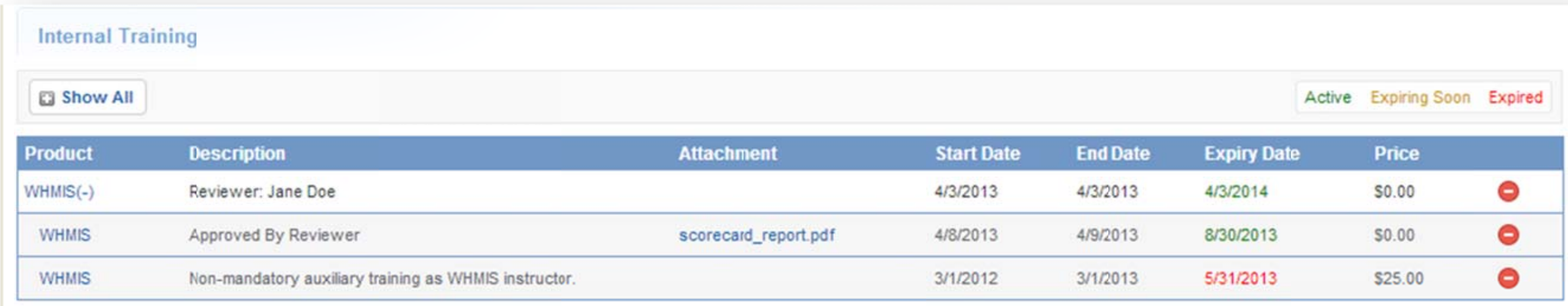


15.1.1 Create Internal Training

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.



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.

15.1.2 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**.

External Training

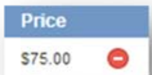
Title	Vendor	Instructor	Location	Description	Attachment	Start Date	End Date	Expiry Date	Price
Driver Certification for Technical Training Unit	DMV - Ilinois Vehicle Services Department	Patience Sobel	Elgin, IL	Commercial drivers license for TTU	drivers-license.jpg	3/1/2013	2/29/2016		$75.00

Brief description of the fields

Field	Description
Title	Name of the training completed by the user.
Vendor	Name of the company or source that provided the training.
Instructor	Name of the instructor who lead the training.
Location	Location where training was completed, i.e. a city, or address.
Description	Brief description of the external training.
Attachment	Optional supporting document (i.e., receipts, copy of driver license) attached to the record. Attachments can be viewed by relevant managers from this menu and by participants via their transcripts.
Start Date	Date that the training item was started by the user.
End Date	Date that the training item expires, if applicable.
Price	Cost associated with training item, if applicable. Identified on cost report.

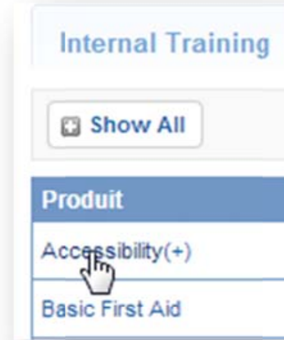
15.1.3 Delete a Record

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.



15.1.4 Edit a Record

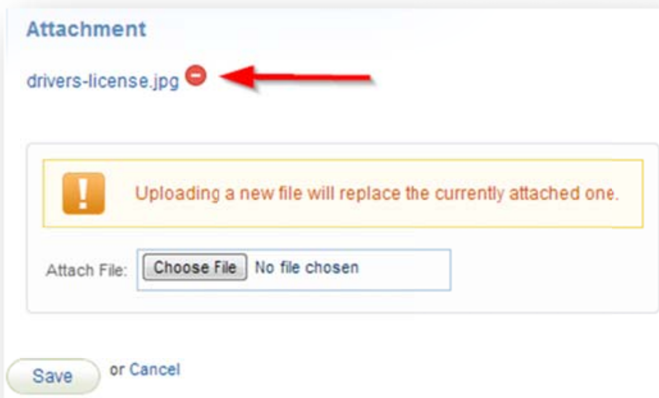
Select the name of any internal or external supplemental training record from the user's list to open en edit page. You can make changes to any of the fields, upload a new file to replace the currently attached documentation, or delete documentation.



15.1.5 Remove Documentation

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

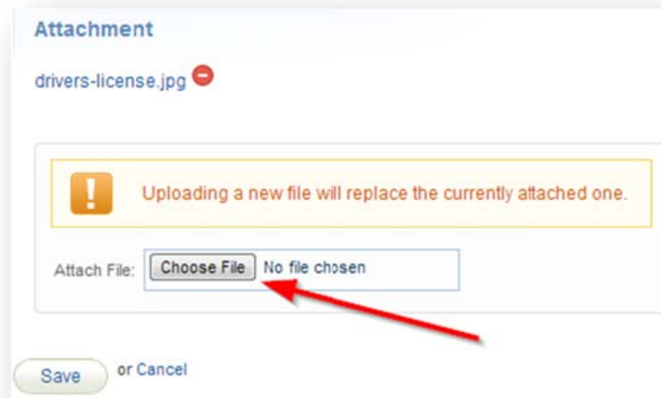
Select the name of the supplemental training record from the user's list to open en edit page. At the bottom of the edit page, under Attachment select **delete**.



15.1.6 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.



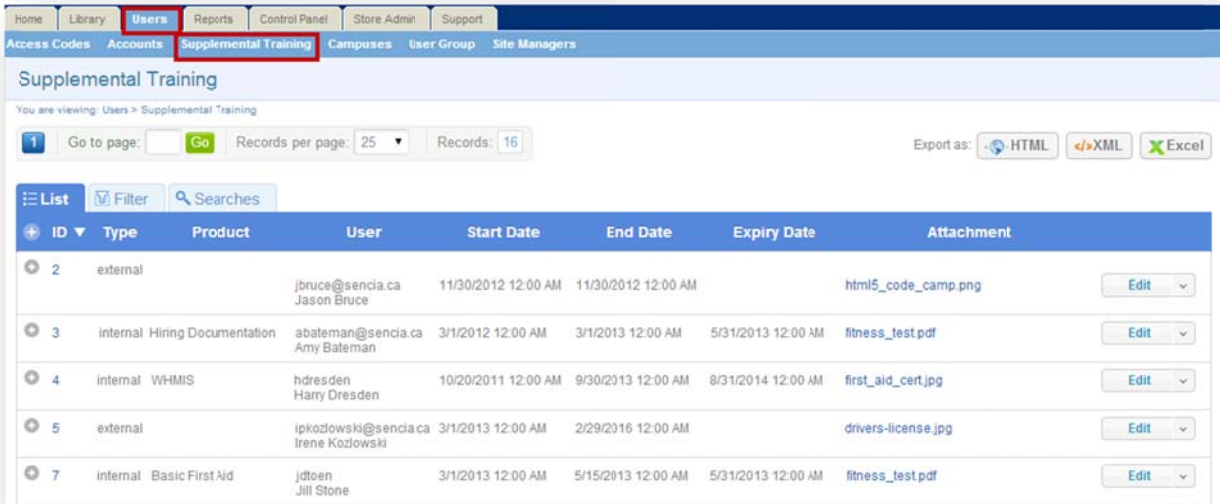
15.1.7 Edit Supplemental Training

Select the name of any training record to make changes to editable fields, such as name, and date, or to upload additional documents to the record.

15.2 Managing Multiple Records

This feature is available to Site Managers and Campus Admins, depending on system configuration. Reps may be configured to see this page as view only.

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.



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

Sortable Columns

Click any column header to change the sort order.

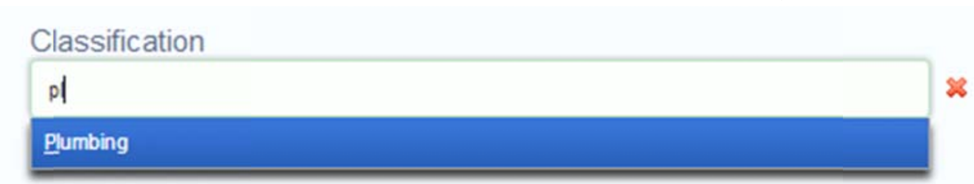
Brief description of the columns

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.

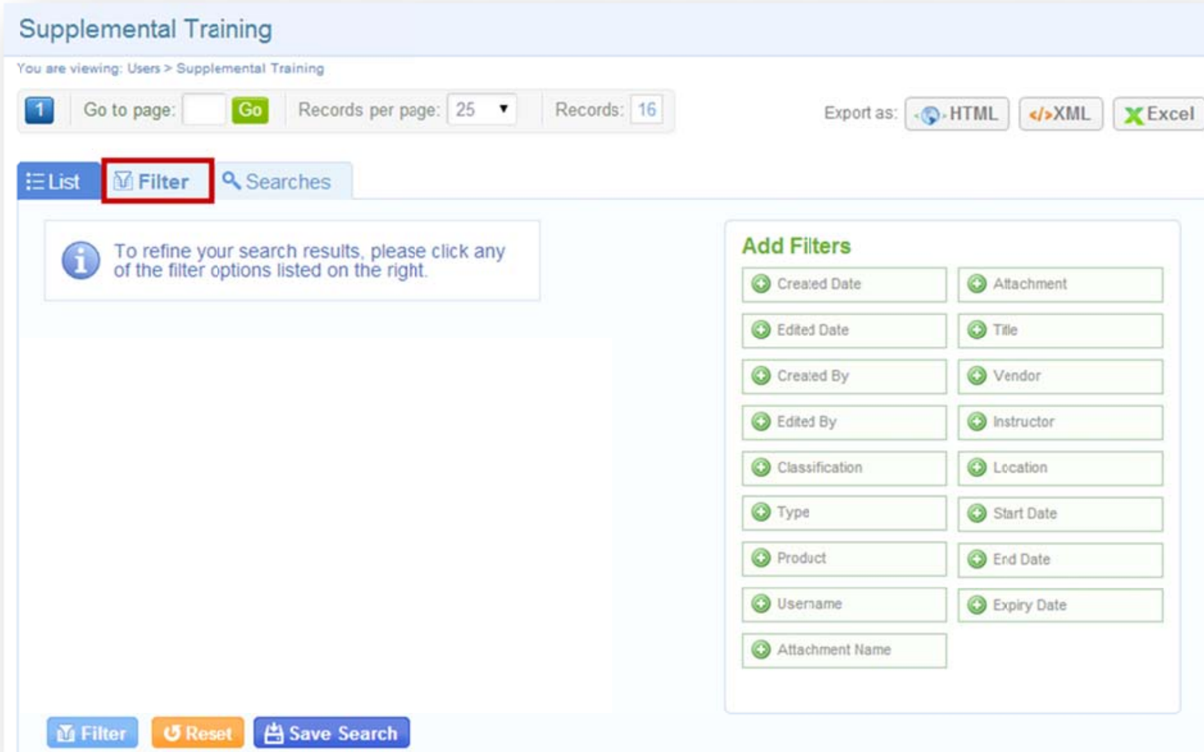
15.2.1 Filter Supplemental Training

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.

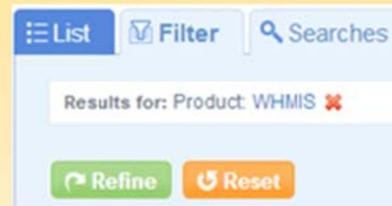
The multi-select filters have an autocomplete feature that displays an existing filter term as you begin to type a word into the field.



Note that you may have additional filters available to you. The filter list shown below is not exhaustive.



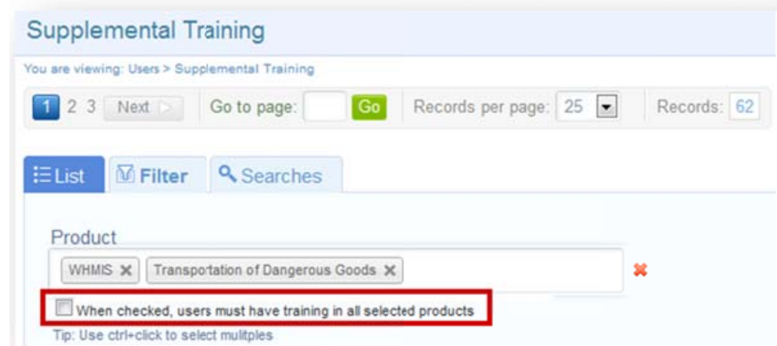
Refine and Reset Filters



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

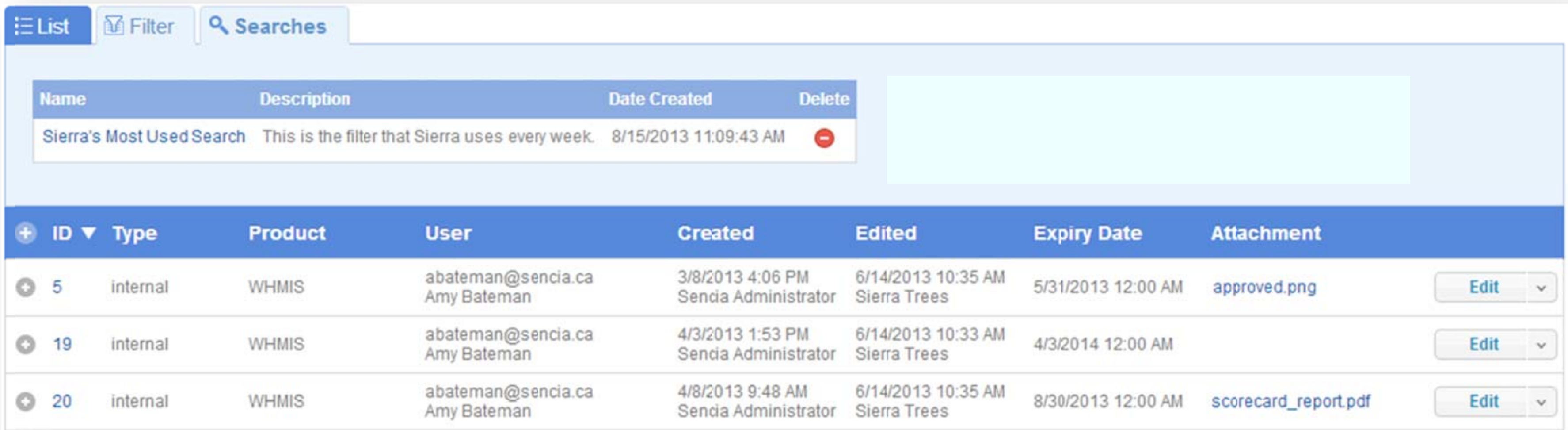
Product Filter

When filtering on products you can opt to force the results to list users who have records attached to all of the selected products, rather than the default that lists all users who have at least one of the filtered products.



15.2.2 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.



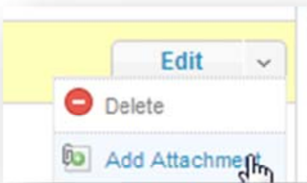
15.2.3 Export

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.

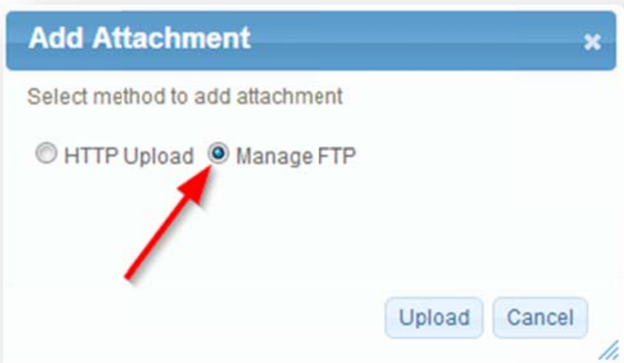
15.2.4 Upload Supporting Documents via FTP

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. Each record can have only one supporting document attached to it.

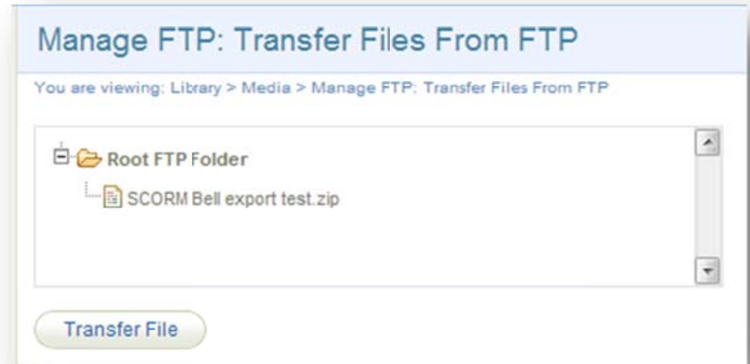
1. Select the **Users** tab and then select **Supplemental Training**
2. Select **Add Attachment** for any training item without an attachment.



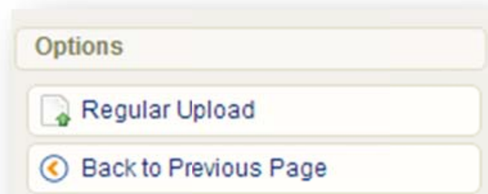
3. Choose the **Manage FTP** Option and then **Upload**



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



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



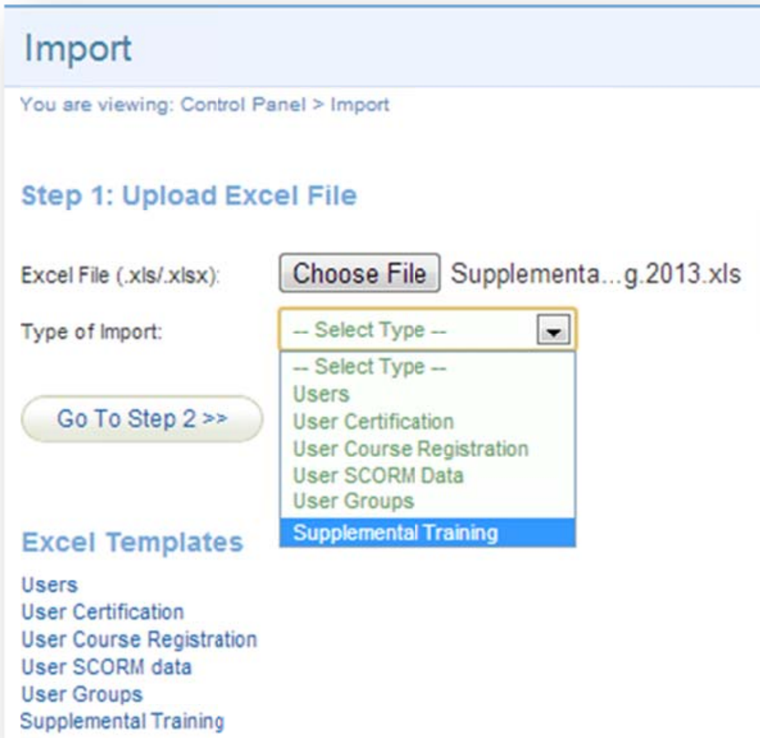
One Attachment per Record

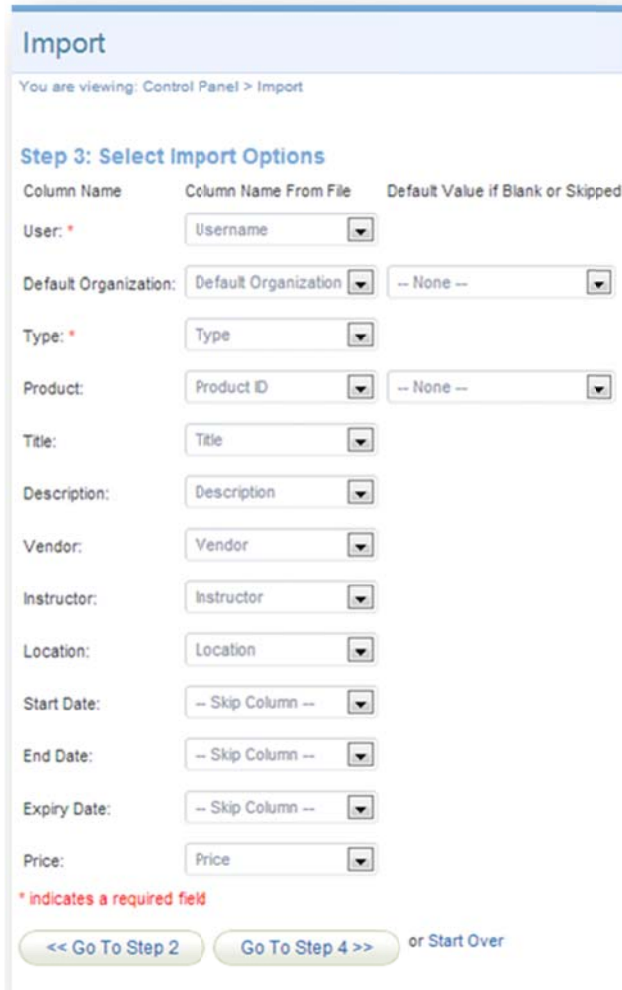
Uploading a new file will replace the currently attached one.

15.3 Bulk Upload Supplemental Training Records

This feature is available to Site Managers, Campus Admins, Campus Managers, and User Group Managers, depending on system configuration.

You can also bulk upload the creation of supplemental training records 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.





Importing Instructions

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

16. Support

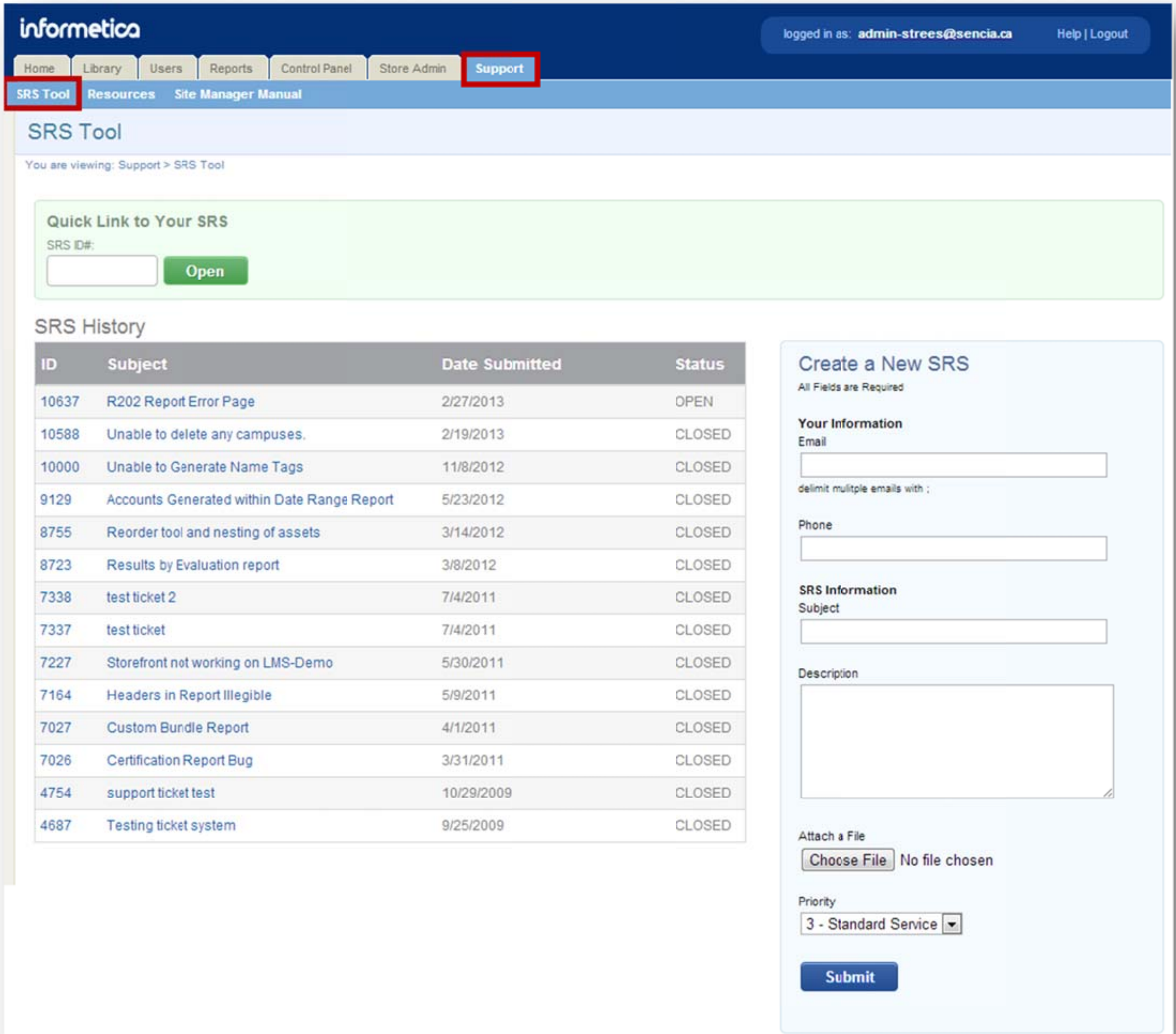
Informetica handles support calls and queries through a support ticket system, which also stores the support query and solution for future review. When a ticket is created, the support team and all key players are automatically notified to ensure that your needs are met.

Topics Covered in this Chapter

The support tabs gives you access to report non immediate system bugs or errors via the service request system tool, gives a list of resources such as user manuals and may have a projects tab where you can access specific training sessions and other relative internal documents readily available to you.

16.1 The Service Request System (SRS Tool)

The service request system (SRS) is the best method to communicate with Sencia's support staff in regards to either opening a service request or to report any problems you may have with Informetica. The SRS tool can also be used to initiate and track projects and requests. Open the service request tool by clicking the support tab and then the SRS tool link at the top. The service request system maintains a log of your previous service requests; these are located under SRS history.


logged in as: admin-strees@sencia.ca
Help | Logout
Home
Library
Users
Reports
Control Panel
Store Admin
Support
SRS Tool
Resources
Site Manager Manual
SRS Tool
You are viewing: Support > SRS Tool
Quick Link to Your SRS
SRS ID#:
Open
SRS History
ID Subject Date Submitted Status
10637 R202 Report Error Page 2/27/2013 OPEN
10588 Unable to delete any campuses. 2/19/2013 CLOSED
10000 Unable to Generate Name Tags 11/8/2012 CLOSED
9129 Accounts Generated within Date Range Report 5/23/2012 CLOSED
8755 Reorder tool and nesting of assets 3/14/2012 CLOSED
8723 Results by Evaluation report 3/8/2012 CLOSED
7338 test ticket 2 7/4/2011 CLOSED
7337 test ticket 7/4/2011 CLOSED
7227 Storefront not working on LMS-Demo 5/30/2011 CLOSED
7164 Headers in Report Illegible 5/9/2011 CLOSED
7027 Custom Bundle Report 4/1/2011 CLOSED
7026 Certification Report Bug 3/31/2011 CLOSED
4754 support ticket test 10/29/2009 CLOSED
4687 Testing ticket system 9/25/2009 CLOSED
Create a New SRS
All Fields are Required
Your Information
Email
delimit mulitple emails with ;
Phone
SRS Information
Subject
Description
Attach a File
Choose File No file chosen
Priority
3 - Standard Service
Submit

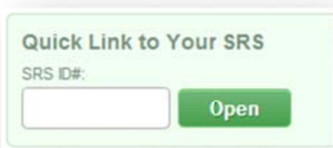
16.1.1 View or Edit Requests

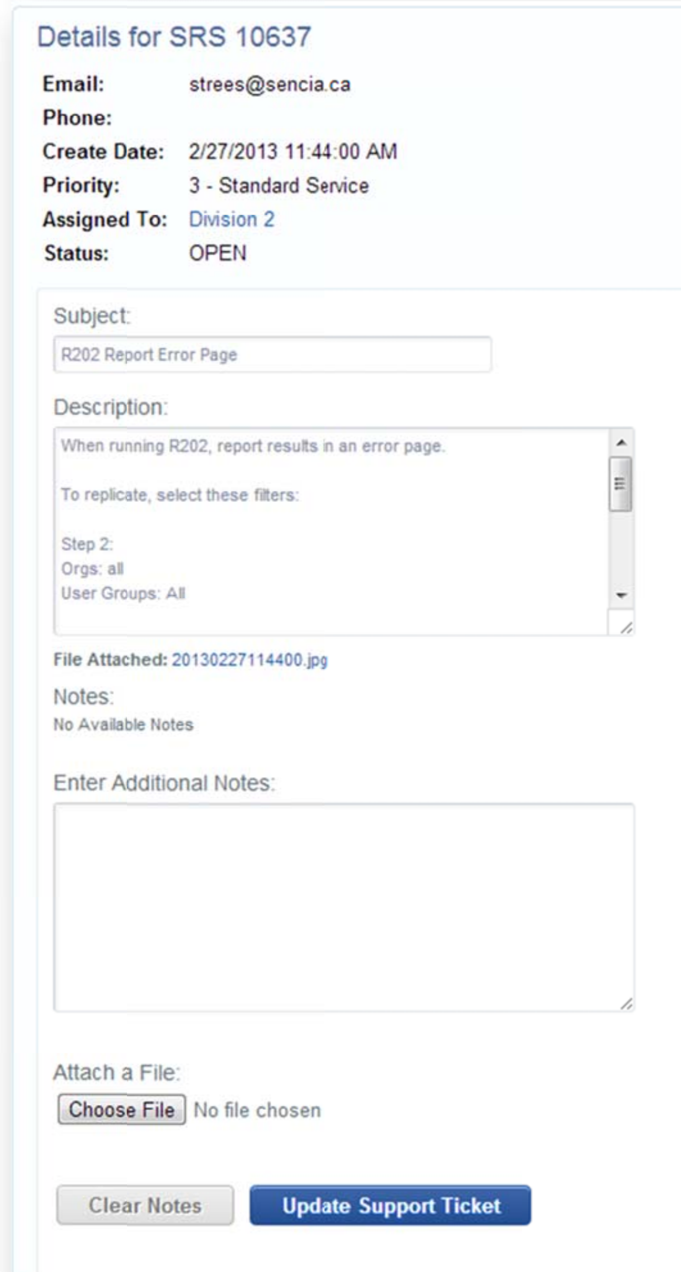
There are two methods to view the details of requests entered into your SRS.

Click to Open: Click the ID or Subject for any item listed in the SRS History.

Update Support Ticket: If your SRS has an open status, you can update it by adding new notes and attach additional files.

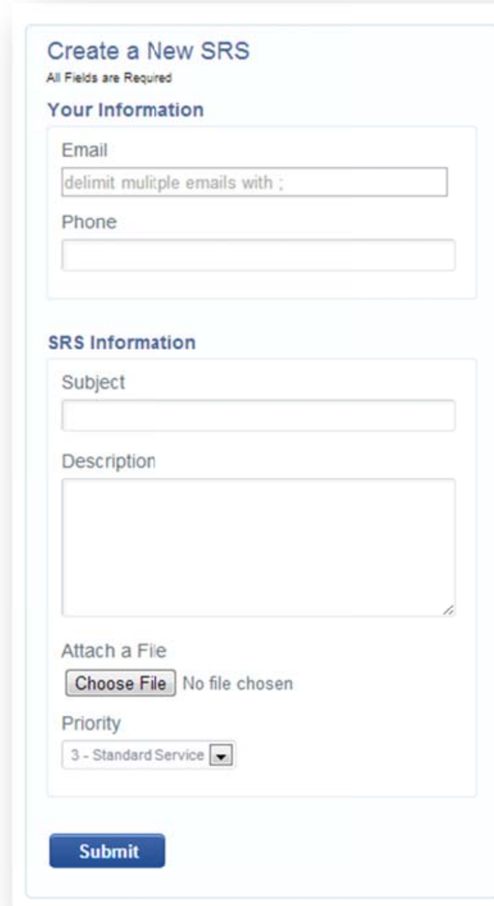
Quick Link: Type the unique ID# for the request into the SRS ID# field and then click **Open**.





16.1.2 Create a New SRS

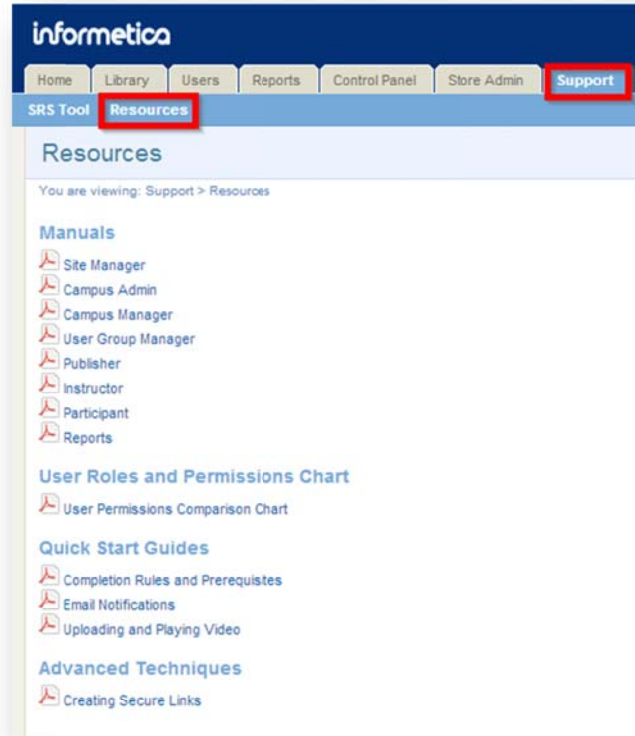
Prior to opening a new support request, you may want to do a search to see if the question you have has already been answered (or, alternately, if a similar problem has been reported and resolved that may assist you). If you are unable to find an answer, then please follow the following steps to open a new service request.



Field	Description	Input
Email	Enter your email address in the field provided.	Required
Phone	Enter a phone number where you may be contacted.	Required
Subject	Enter a subject for the service request.	Required
Description	Enter the description of your request; be as specific as possible if reporting an error, or if requesting functionality.	Required
Attach a File	Attach a file, usually a screenshot that illustrates the issue you are having. Detailed screenshots can really help the support team when solving your issue.	Optional
Priority	Choose a priority for your request; there are three levels of priority that can be selected. • 3 - Standard Service requests are for normal requests. • 2 - Priority Service requests should only be used in extreme cases where a response is required as quickly as possible. • 1 - Major Problem – this indicates an emergency that needs immediate attention. This typically means that the LMS functionality is impeded and it is affecting your users.	Required
Submit	Click **Submit** when you are done creating the ticket to send the item to Informetica's support team.	Required

16.2 Resources

The resources link will take you to a centralized area that contains various help tools for using the Informetica LMS. Among these tools can be links to user manuals and other helpful documents. Open resources by clicking the support tab and then the resources link at the top.



Manuals: These links open detailed user manuals for each user type and the report wizard.

User Roles and Permissions Chart: This link provides the system privileges available to the different user types.

Quick Start Guides: These 1 page, visual job aids provide guidance on the features and functionality of specific Informetica modules and/or processes.

Advanced Techniques: These one-page, visual job aids provide guidance on more advanced and/or technical features within Informetica.

16.3 Projects

Some clients are set up with a customization know as projects. This tab will only display for specific high level Site Managers. This project share area is used to make training sessions and other relative internal documents readily available to our clients. The projects page is maintained by Sencia Administrators.

17. Access Codes

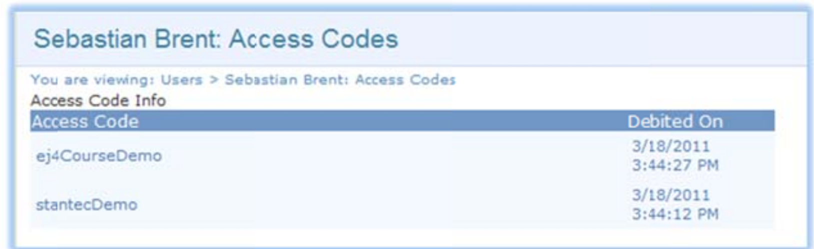
Access codes can be used for things like quick registering a group of users to new courses or to guide a new user through the registration process and give them immediate access to the groups and courses they need.

Topics Covered in this Chapter

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.

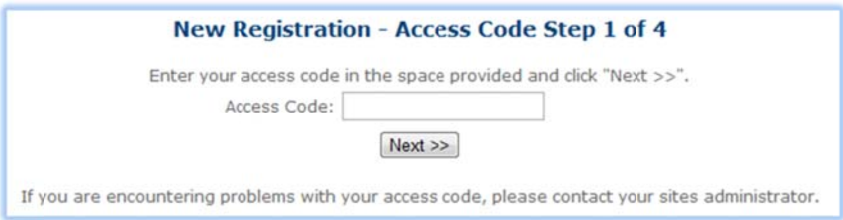
Using Access Codes for Auto-Enrolment

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.

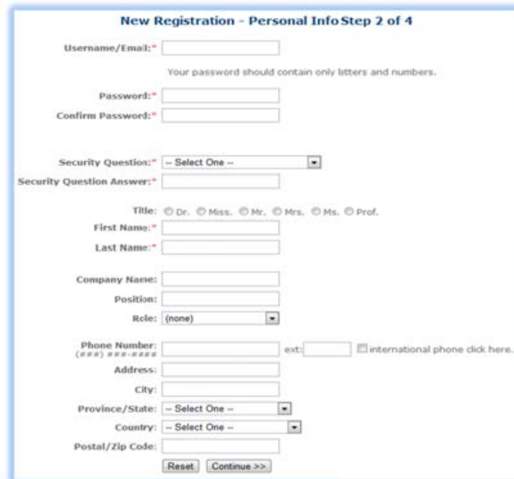
Using Access Codes for New User Registrations

How access codes are used and work for your users is dependent upon the configuration of your system. One typical use 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

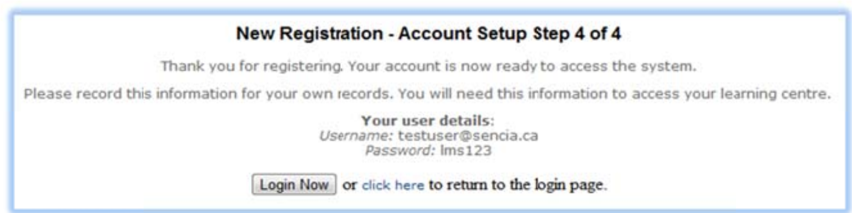


Step 2: the user enters the required information for registration



Step 3: the user confirms or edit their entries

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



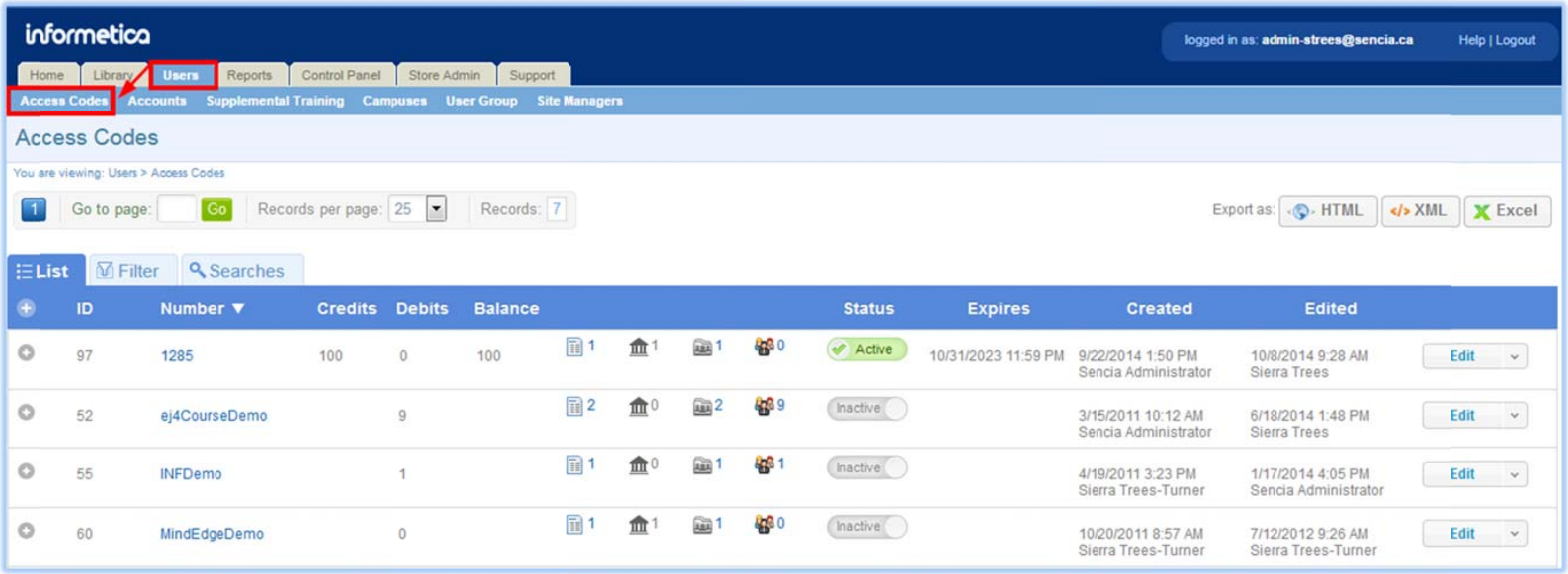
Using Access Codes with Current User Registrations

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.

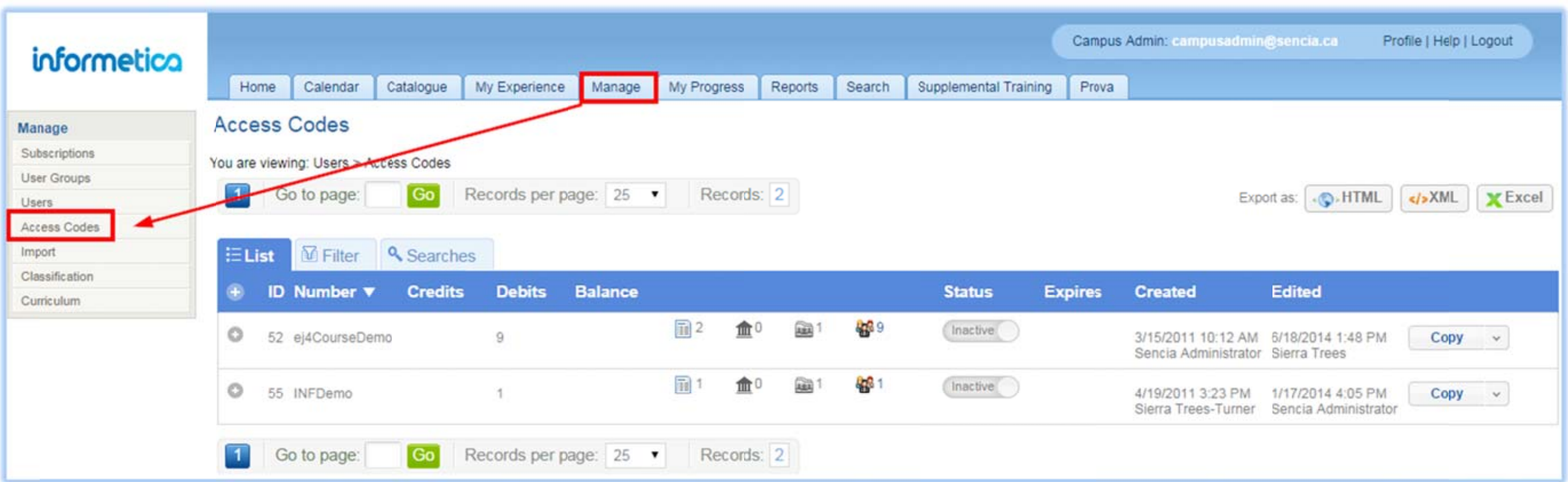
Access Codes Management Page

The access code management page lists all access codes in use by your organization. From here you can 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.

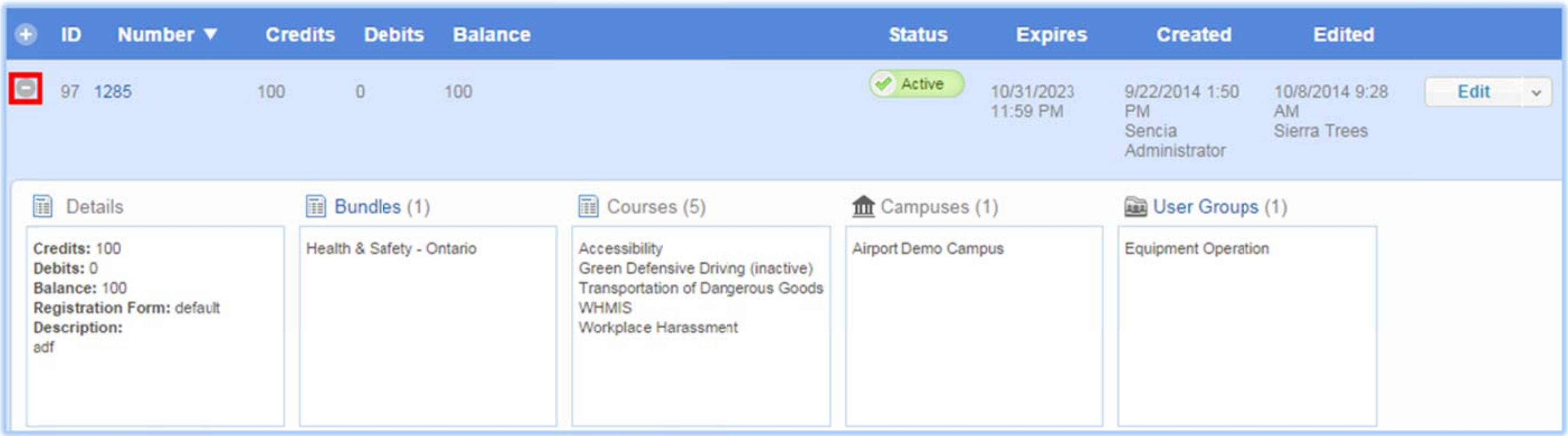
Site Managers navigate to this page by selecting **Users** from the main navigation panel and then selecting **Access Codes**.



Campus Admins and Campus Managers can manage access codes that belong to their campuses by selecting the **Manage** tab from the main navigation bar, then selecting **Access Codes** from the manage menu on the left.



Expand an access code to view the description, bundles, courses, campuses, and user groups associated with the access code. Expanded view for Campus Admins and Campus Managers shows users as well, but Site Managers have a separate users link where users are listed in paginated view.

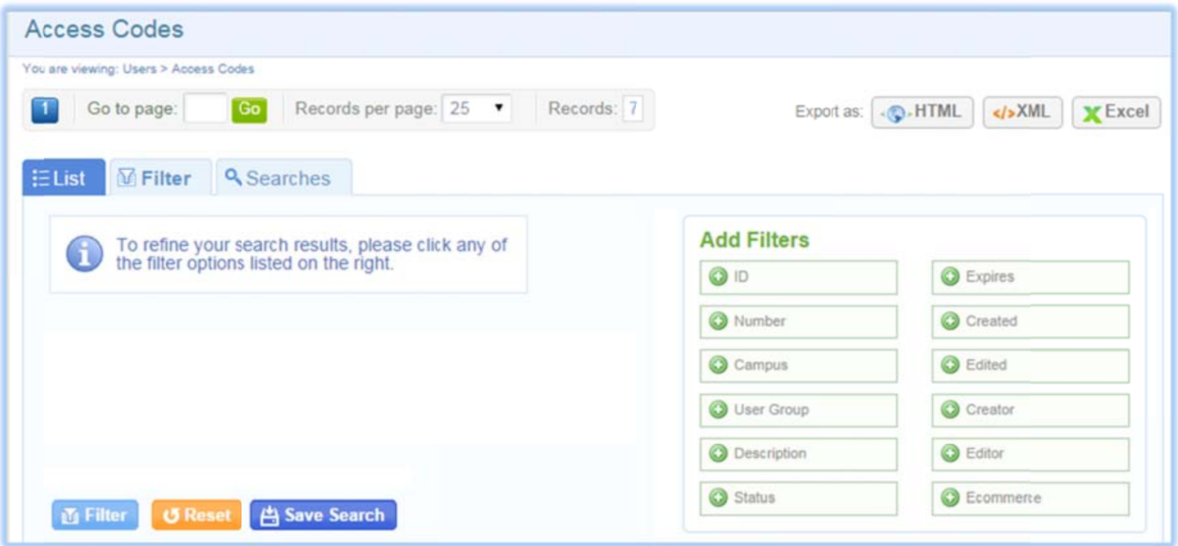


Brief description of the fields

Field	Description
ID	The system automatically gives each Access Code a unique identifier.
Number	The name of the access code. Use the edit link from detailed view to change the name of the access code.
Credits	The total number of times the access code can be used.
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.
Balance	The number of uses remaining for the access code.
Status	Indicates whether the access code is active or inactive.
Expires	If applicable, this will indicate the date that the access code becomes unavailable.
Created/Edited	Logs the date and time of the creation and last edit of the access code
Edit	Site Managers update the Access Code number, description, credits, expiry, associated user groups and bundles, and delete codes. The copy tool is also available from the edit button.
Expanded View	Shows the description and lists the Bundles, Products, Campuses, User Groups, and Users associated with the access code. Note that Site must open the Access Code and select **Users** from the Navigation menu to see a list of users.

Sort and Filter Access Codes

Select the filter tab to narrow the results of the access code 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** to get the narrowed list of codes. Use the **X** to remove a filter it or **Reset** to clear all filters. You can also save your filters using **Save Search**. Note that filters use an OR statement. E.g. if select one campus and 5 user groups, the filter will return a list of codes in the selected campus with any of the 5 user groups, not codes that are in all 5 of the groups.

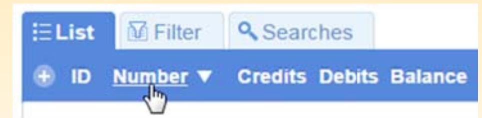


Export

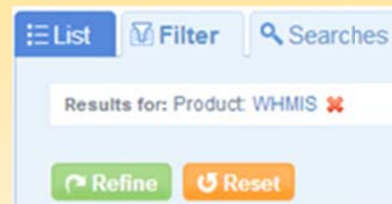
Export all records or filtered lists as HTML, XML or Excel from the top of the page.

Sortable Columns

Access Codes can be sorted by selecting any header. The list will be resorted from ascending order; select it again to sort in descending order.



Refine and Reset Filters



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

Create an Access Code

Campus Admins and Campus Managers

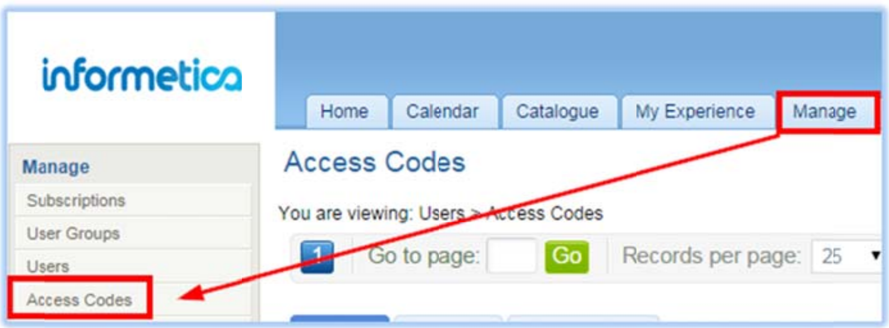
You system will have one of two configurations for creating access codes: the default or subscription based. Campus Admins and Campus Managers may not make changes to a code after creation.

Subscription based systems require a Site Manager to define a number of subscriptions for Campus Admins and Campus Managers that are then debited by the number of credits assigned to an access code. You will not be able to create an access code if you have no subscriptions available. See Step 1 below and the Subscriptions chapter for more information.

Product Enrollments

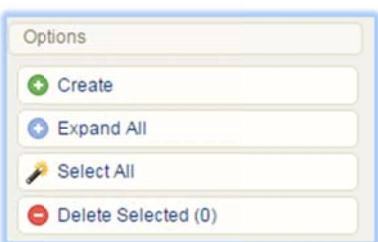
Campus Admins and Campus Managers must use access codes to enroll users to products.

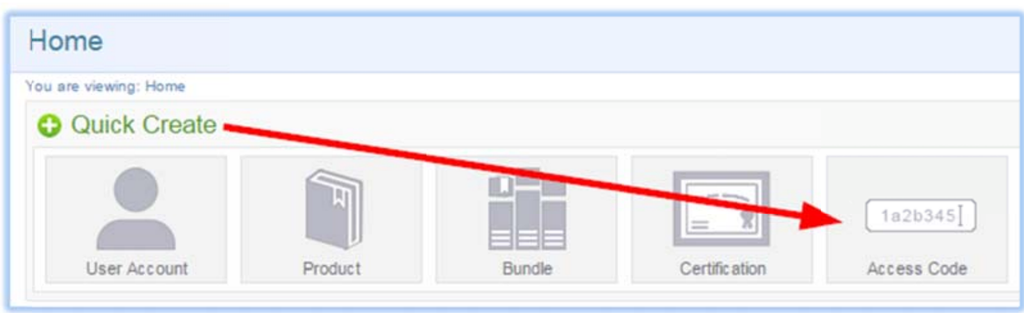
To create a new access code, select **Create** from the manage access codes page.



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.





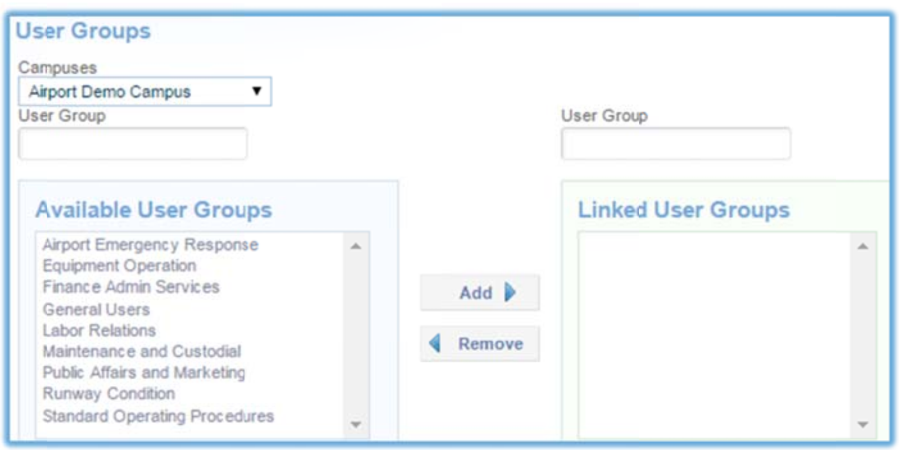
Step 1 Define Details

Status: Choose active or inactive. Only active codes can be used for registration.
Expires: Enter an expiry date or leave the field blank for access codes that do not expire.
Number: Enter a number or generate randomly.
Description: Optional text description for internal use.
Credits: Enter the number of times this code can be used or leave blank for unlimited use. Unlimited use can only be used once per account.

If your system uses subscriptions (eCommerce), then the number you enter will pull from your available subscription credits. The system will not let you use more subscription credits than what is available to you. Subscription credits apply to all access codes, so if you have a subscription credit of 100 and use 100 credits on this code, you will have used all your subscription credits.

Registration Form: This option should be selected only if the code will be used to create user accounts. If your site uses several different registration forms, then you can select which one you want presented to the user during account creation after using this access code.

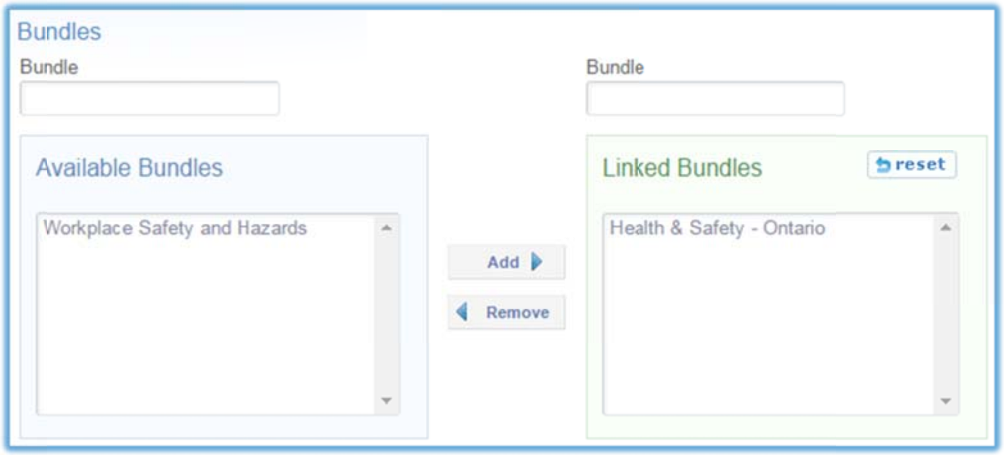
Step 2 Associate User Groups



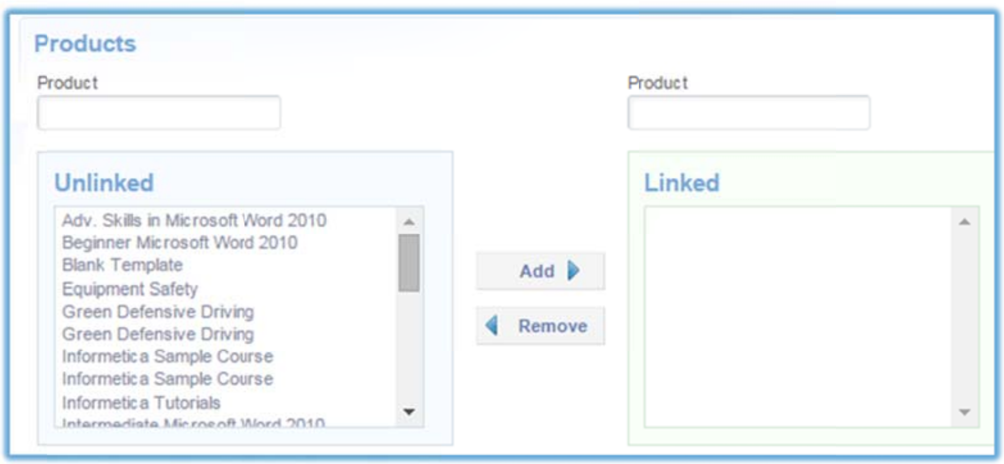
Campuses: Use the drop down menu to filter by Campus.
User Groups: An access code must be linked to one or more user groups, so you must select user groups to assign the access code to. Add available user groups to the Linked User Groups box.

Step 3 Link Bundles or Products

Choose to link bundles or products to this access code.



Bundle Selection: Add product bundles from the Available box to the Linked Bundle box. The bundles that are available here are populated by what is available to your campus.



Product Selection: Add products from the Unlinked box to the Linked box. The products that are available here are populated by what is available to your campus. A bundle is automatically created with the selected courses that has the same name as the access code.

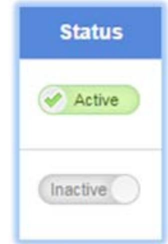
The system will use the number of credits you enter for all of the products you selected. For example, if you enter 20 credits and select two products, then 20 credits will be debited from the credits available for both products. The access code can be used 20 times and will register users to both products.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

Step 4 Save

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

Activate or Deactivate Access Codes

This feature is available to Site Managers, Campus Admins, and Campus Managers depending on system configuration.



Use the toggle to switch an access code to active or inactive. Only active access codes can be used by users accessing the system; an inactive code cannot be used by users accessing the system.

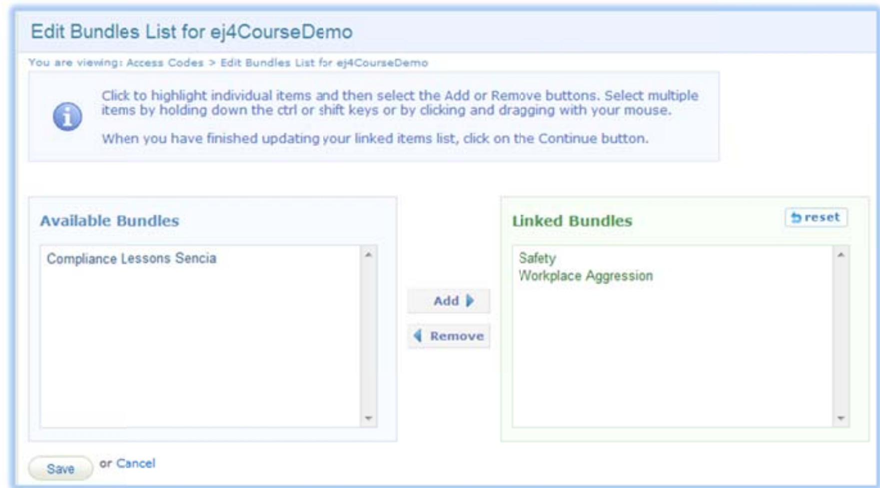
Bundles

This feature is available to Site Managers.

Bundles may be assigned to an access code for easy enrolment of one or many users. 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.



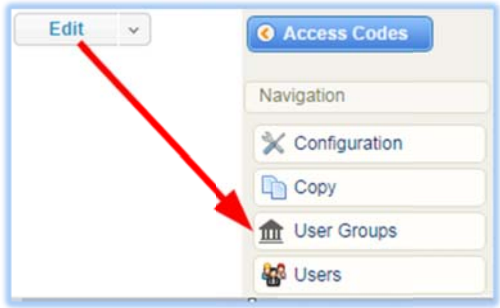
Note that if your site uses the auto enrolment by user group configuration, then you may not have access to the bundles. With auto enrolment, everyone in a user group has the exact same list of courses as each other. The access code registers user to user groups and the auto-enrolment then enrolls that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

Users Groups

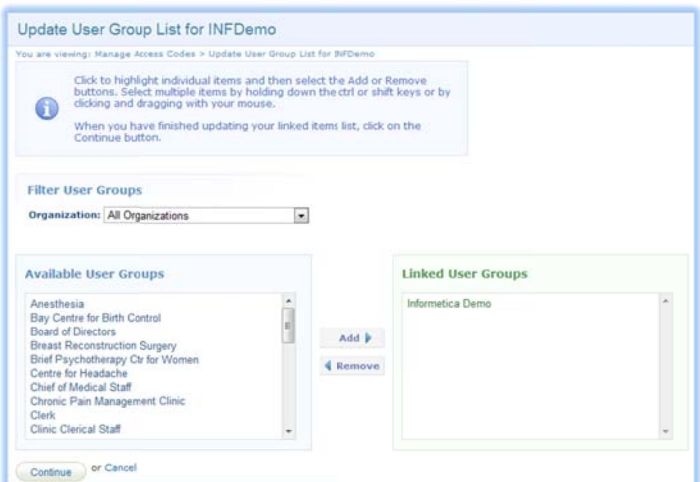
This feature is available to Site Managers.

You can change the users groups associated to an access code.

1. Expand the access code and select the user groups. Alternatively, select **Edit** and then select **User Groups** from the Navigation menu.

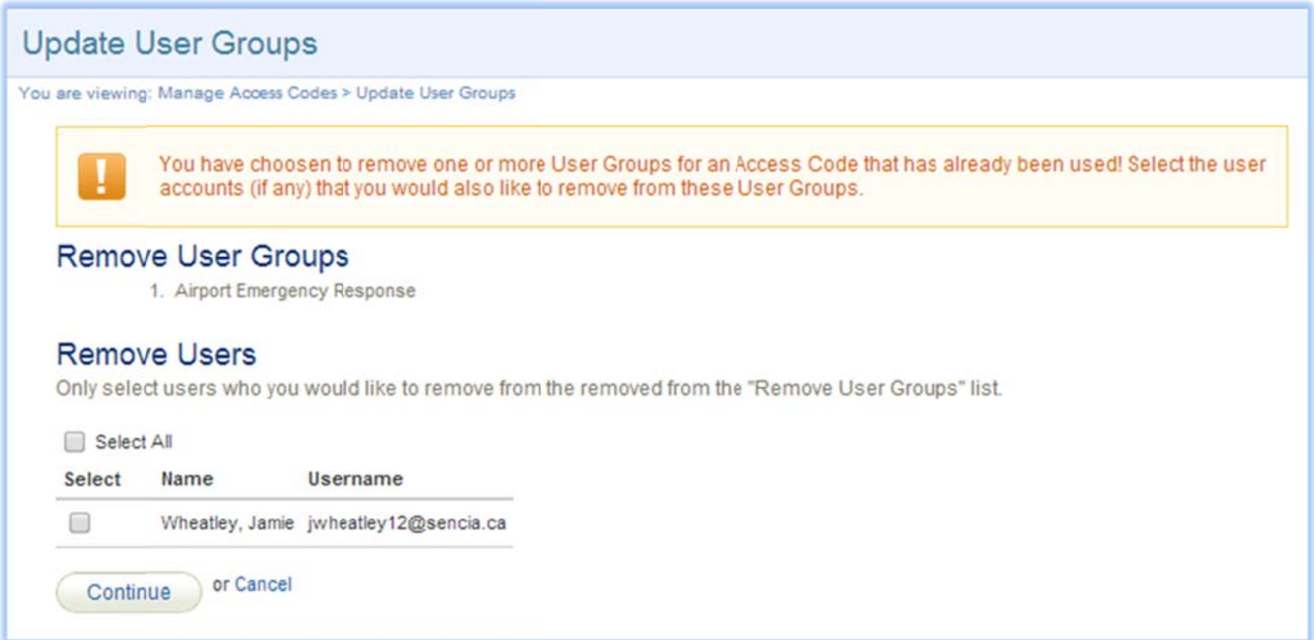


2. This opens the update user group page where you can add or remove the user groups associated with the access code.



3. When changes are made, the system will automatically check for affected users. Users affected will appear on your screen, giving you the option to remove the access code from the user group.

4. **Continue**



Managing Multiple Records

This feature

Removed Users

Removed users are removed from the selected User Groups, which may affect reports run on the original group. The Access Code debits, credits, and the users' course enrollments remain unchanged.

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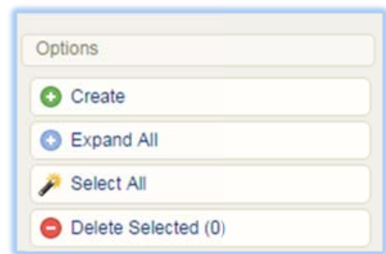


Edit an Access Code

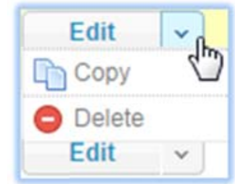
This feature is available to Site Managers.

Select **Edit** to make changes to an access code. Alternatively, select the access code number to open the edit page. You can make modifications to the number, description, credits, expiry, user groups, and bundles. Select **Update** at the bottom of the screen when you have finished making changes.

Campus Admins and Campus Managers may not make changes to a code after creation.

Copy an Access Code

This feature is available to Site Managers, Campus Admins, and Campus Managers, depending on system configuration.

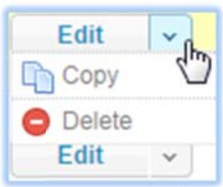


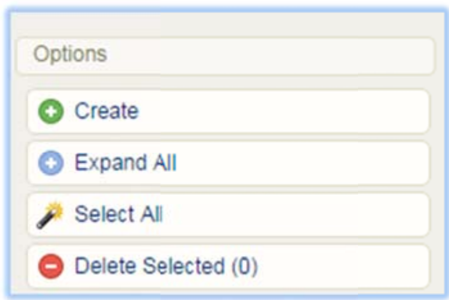
When you copy an access code the associated bundles and user groups are also copied. Select the down arrow on the **Edit** button and then select **Copy**. You will be able to make any necessary changes to the new copied access code before saving.

Delete an Access Code

This feature is available to Site Managers.

To permanently delete an access code, select the down arrow on the **Edit** button. Alternatively, you can select several access codes by clicking them (selected codes will be highlighted in green) **Delete Selected** from the Access Code Options menu. Click yes on the delete access code prompt.





18. 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.

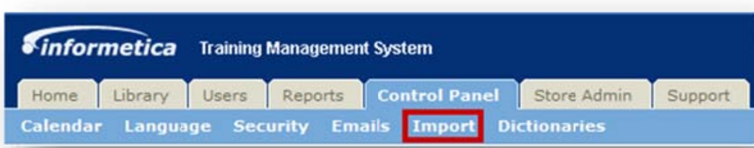
Topics Covered in this Chapter:

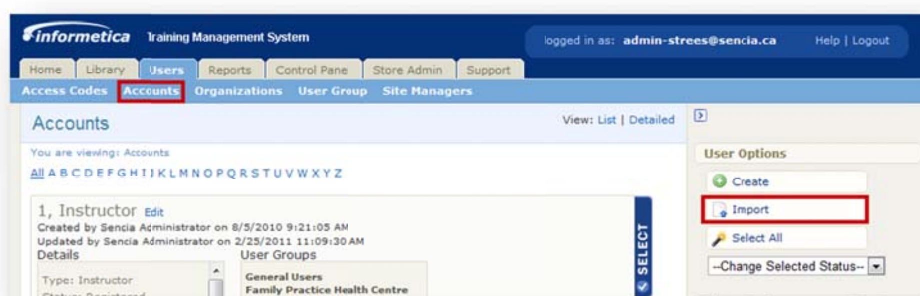
If your site has the Import configuration, then site managers, campus admins, and organization managers you can use an Excel spreadsheet to import information in bulk. Use the import tool to create or update user information en masse, assign users to completed certifications and mass enroll users to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

18.1 Accessing the Import Tool as a Site Manager

There are two ways to access the import tool as a Site Manager:

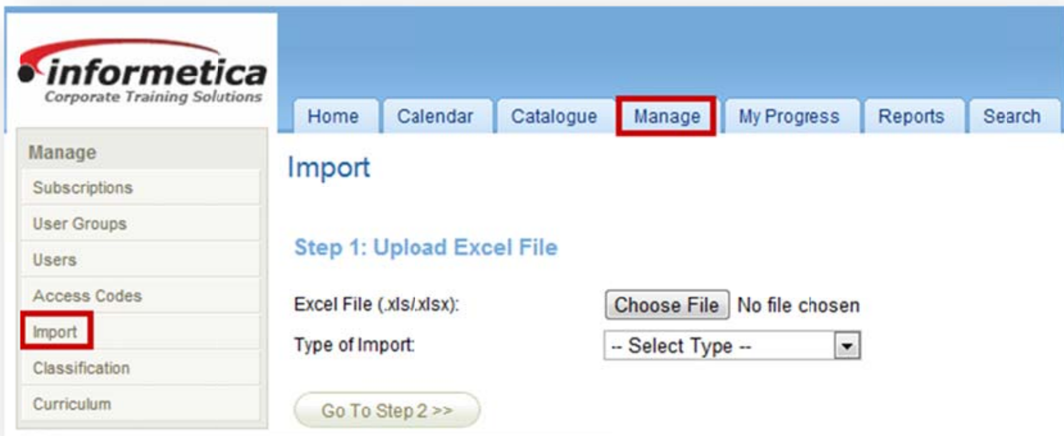
1. From the control panel tab, click the Import link. This method will let you select the type of import you wish to upload
2. From the users tab, click the accounts link. There is a menu to the right called user options. Click the Import link under this menu. Navigating using this method will automatically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





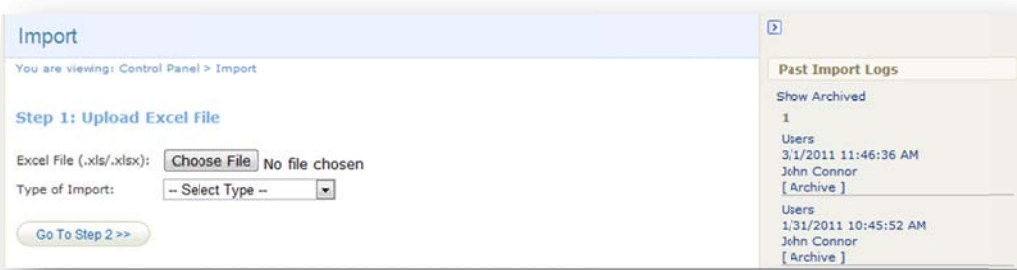
18.2 Accessing the Import Tool as a Campus Admin or Campus Manager

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



18.3 Import an Excel File

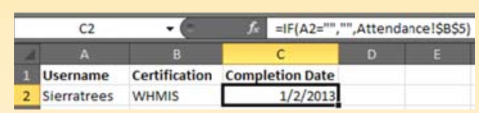
From the Control Panel tab, click the import link. This will open the Import tool that will let you select the type of import you wish to upload. If you are importing user names, you can base the import either on username or first/last name and email. It is recommended that you import in batches of 500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



Prepare Your Excel File

The import tool prefers .xls files.

Make sure that cells do not contain any formulas, but only the data value itself. Data in formulas will not be recognized.



The import tool supports multiple entries into one field for Classifications, Campuses, and User Groups. Use a comma to separate values and make sure to define a default.

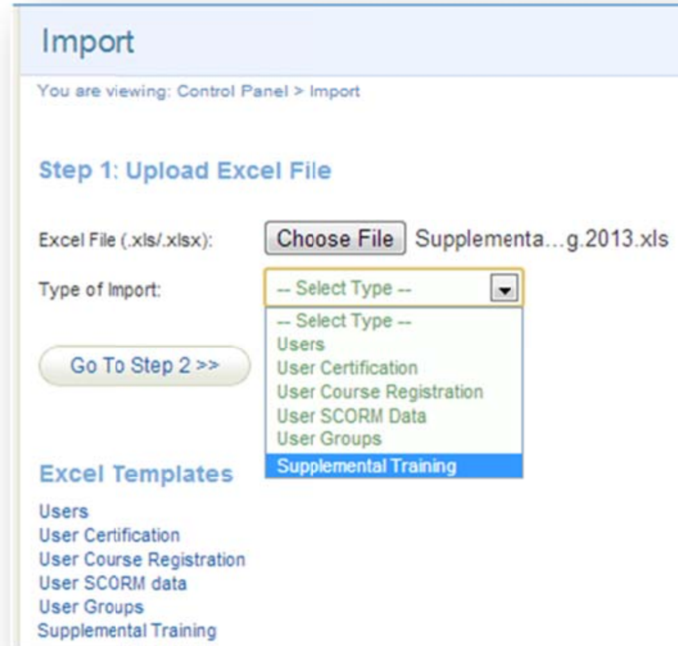
Brief description of the fields

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: accounts are created or updated and can be associated to multiple classifications. • 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

18.3.1 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.



18.3.2 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.

Import Types

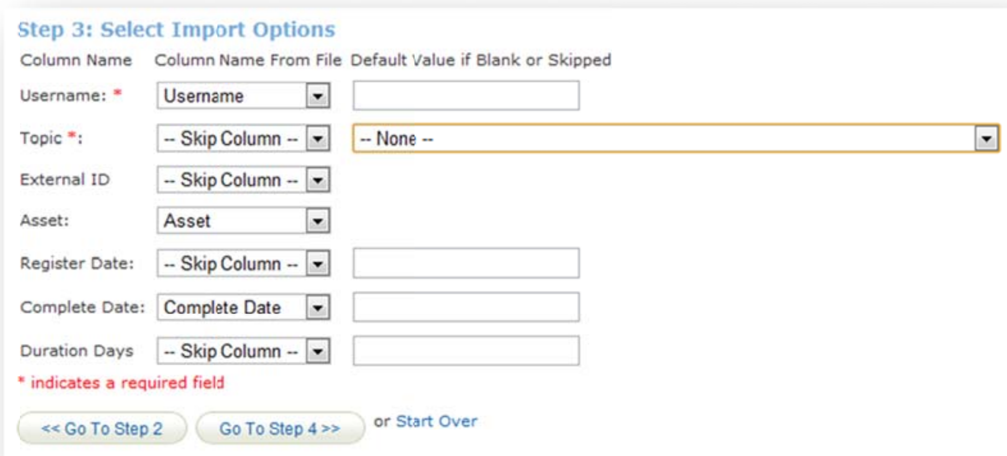
The types of imports available vary by system, so your options may differ from those pictured. Contact your system administrator to have an option activated for your system.

18.3.3 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.



Import Fields

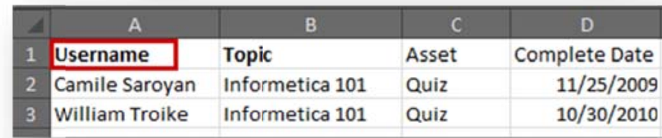
You can use skip, dropdown, and input fields in combination with each other.

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.

Use Caution

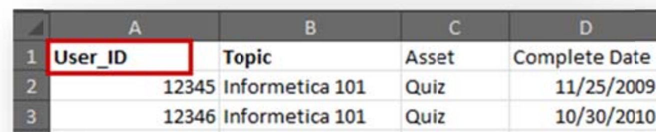
Whichever column you pick will import into the LCMS or overwrite existing information, so be careful with your selection.



	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

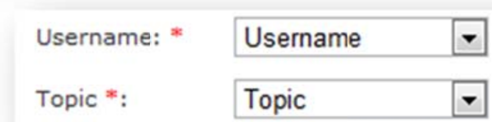
If the column names in the Excel file differ from what the LCMS names are, you can still match them by selecting the appropriate Excel column name. Use the drop down menu to select another column from the Excel file. In the example, the Excel file does not have a column called username, but selecting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

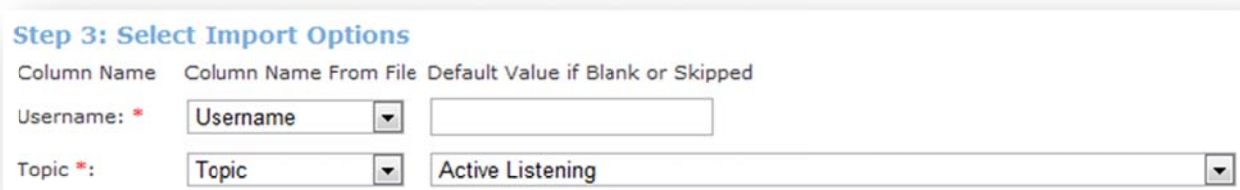
If the LCMS data does not have an exact match or if the information is blank on the Excel import, then you will see “--Skip Column--”. You can select a new match from the drop down menu or keep the skip column option. Skipped column data will keep the data that is already in the LCMS without updating 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 27^{th}, 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.

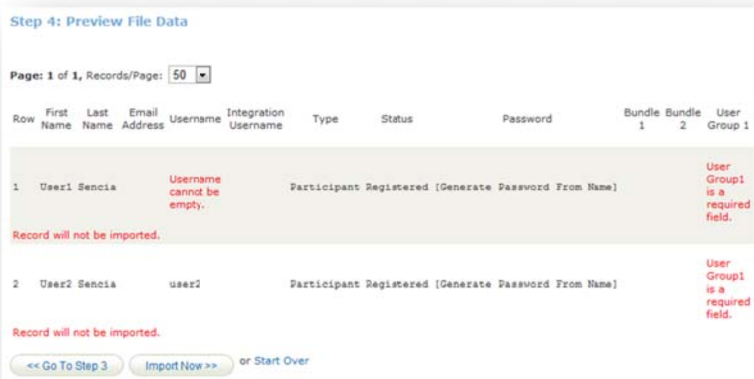


18.3.4 Step Four: Preview File Data.

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.

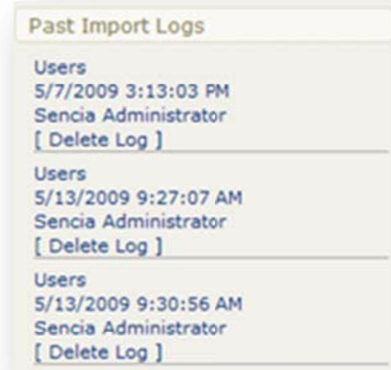
For all types of imports, a match is attempted on First Name, Last Name and Email Address. If a match is found, the user record is updated. If a match is not found and the type of import is “User” or “User Trial Registration”, the new user is inserted. If a match is not found and the type of import is “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.

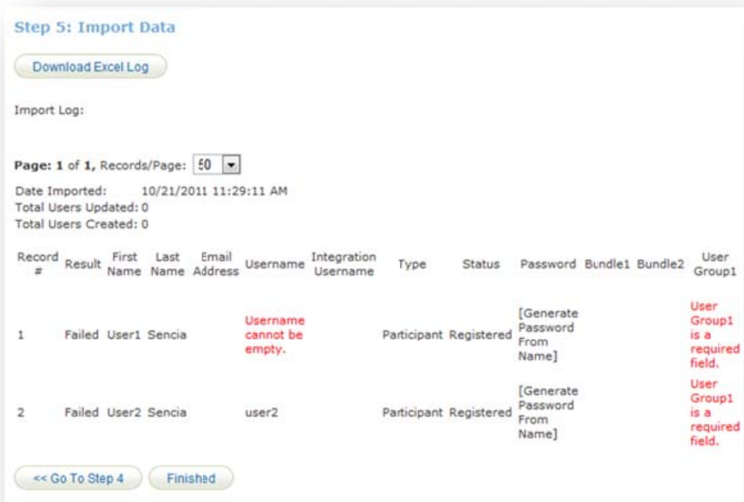


18.3.5 Step Five: Import Data.

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.



19. Curriculum

Topics Covered in this Chapter

Site Managers and Campus Admins/Managers use curriculum to identify required testing materials and due dates for participants and the participants can filter to see only the required assets 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. Users set up with the proper default classification and campus, will be automatically have the curriculum applied. You can opt to enable automatic email alerts to remind participants about approaching curriculum due dates. *Curriculum supports the following assets: assignments, evaluations (classic, Prova, Test Portal), SCORM, and assessments.*

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

One per Person

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?

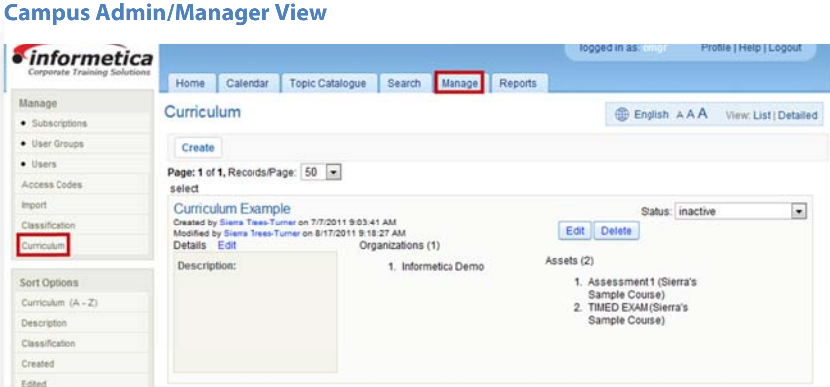
- Identifies different learning paths for participants

- Show participants which assets they are required 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 assets and sends out reminder email alerts before the due dates

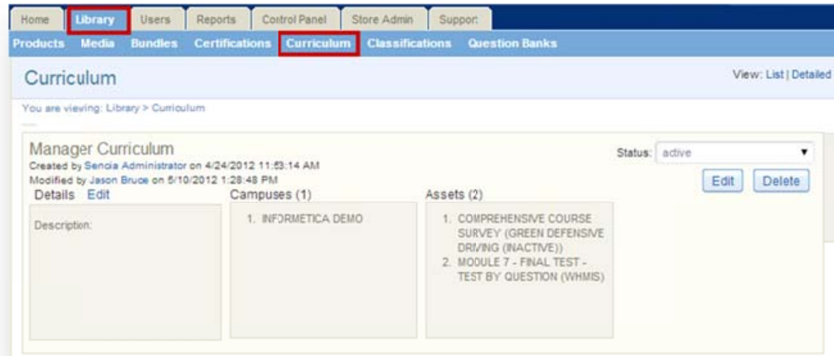
19.1 Navigate to Curricula

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



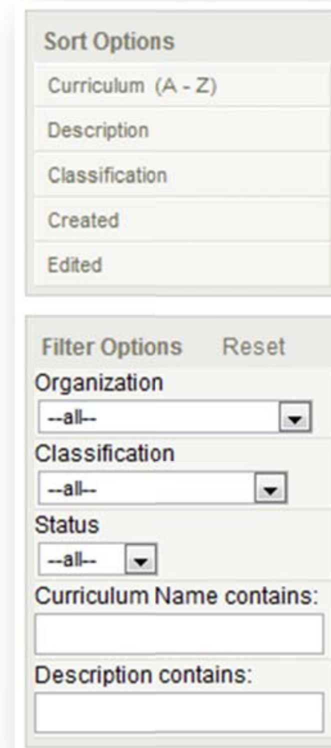
Below is a brief description of the fields

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

19.2 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.

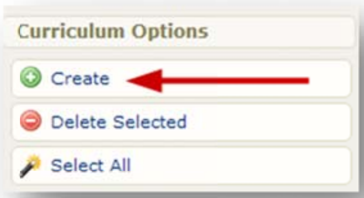
A brief description of the fields

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.

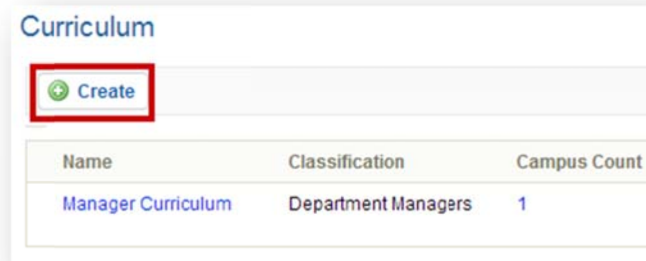
19.3 Create Curriculum

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

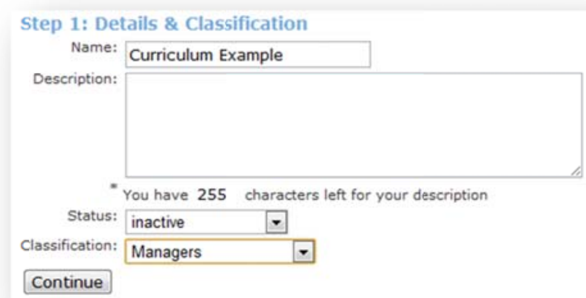


Campus Admin/Manager View



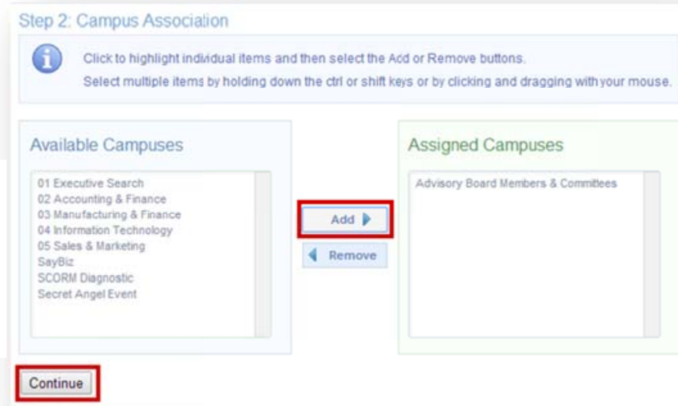
Step One

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.



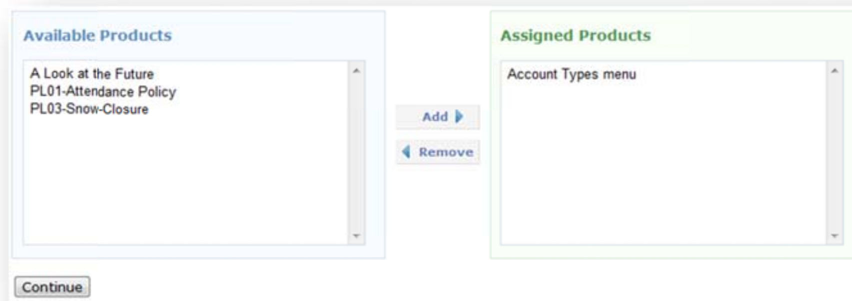
Step Two

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**.



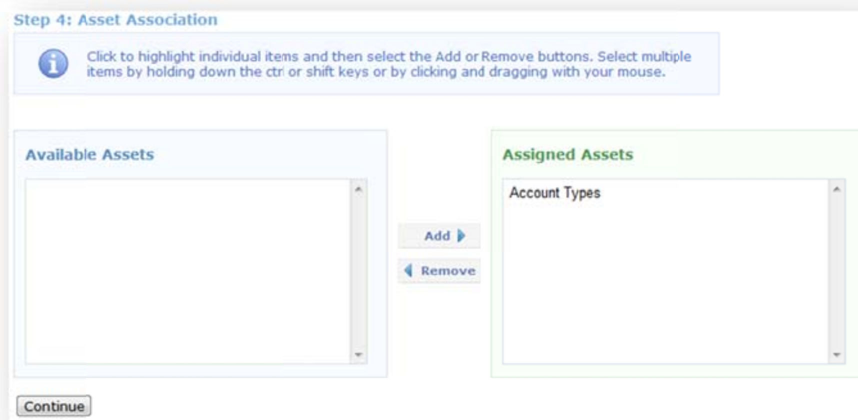
Step Three

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.

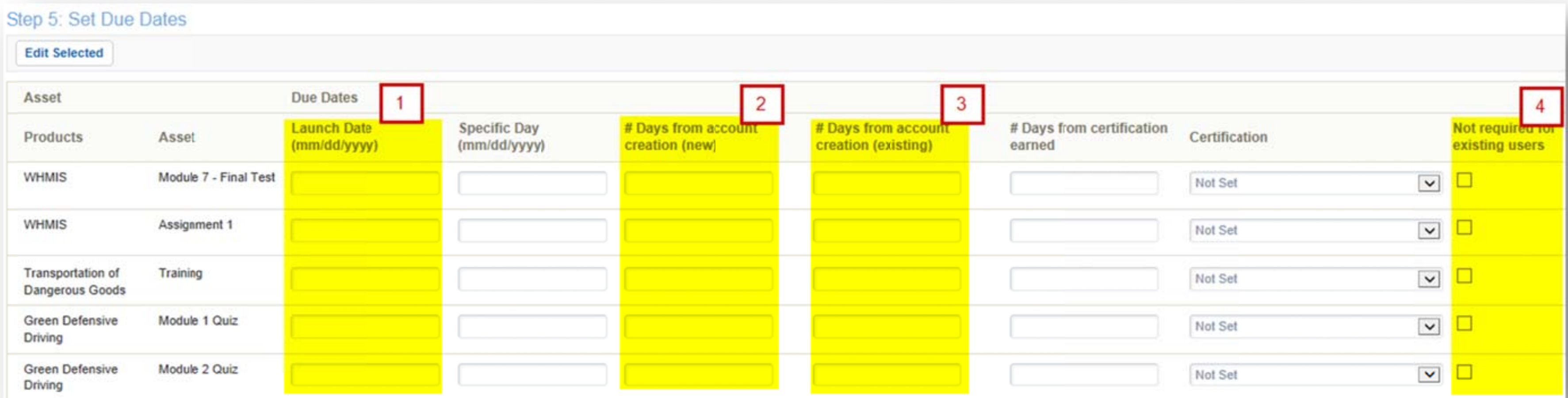


Step Four

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.

Advanced Due Date Options

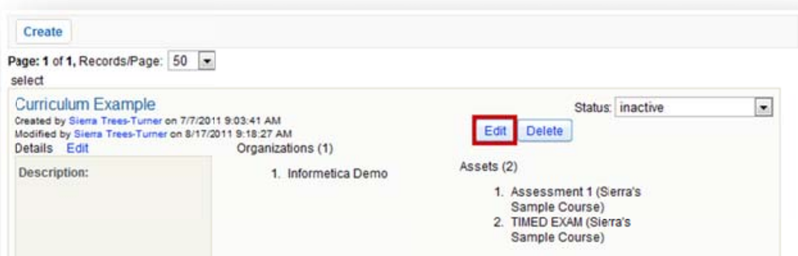
The dates highlighted in yellow are used in conjunction with one another. This advanced features lets you apply the same curriculum with different due dates depending on the defined launch date. To illustrate this, imagine that you have both new trainees and existing employees that are required to complete a new curriculum. However, new trainees are required to complete it within 5 days after they were hired, whereas established employees have a month to complete it.

1. First, define your **launch date**. This date is used to determine existing and new users for the purposes of curriculum only. You are letting the system know that accounts created before the defined launch date are "existing users" (established employees) and accounts created after the defined launch date are "new users" (trainees).
2. **# Days from account creation (new)** is where you would enter 5. This lets the system know that "new users" must complete this curriculum 5 days after their account is created.
3. **# Days from account creation (existing)** is where you would enter 30. This lets the system know that "existing users" must complete this curriculum 30 days after their account is created. You can expect to find employees that are severely overdue if they have older hire dates.
4. Use **Not Required for Existing Users** to exclude an asset's curriculum requirements for anyone hired before the defined launch date. You do not require # Days from account creation (existing) in this case. Any number entered into # Days from account creation (existing) would be overridden by this option.

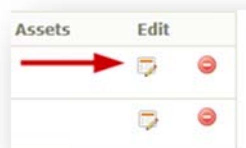
19.4 Edit Curriculum

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

Detailed View



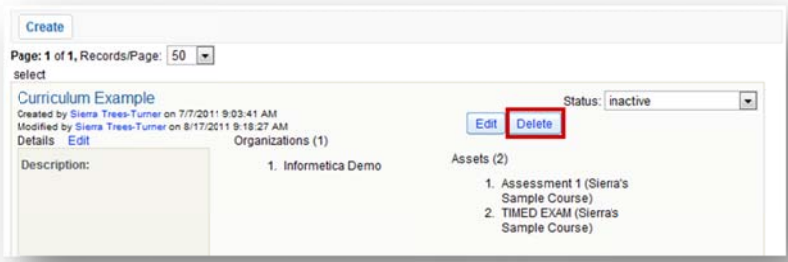
List View



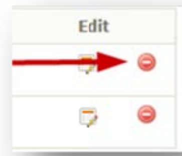
19.5 Delete Curriculum

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

Detailed View



List View



19.6 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.

20. 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

19.1 NAVIGATE TO CURRICULA

19.2 SORT AND FILTER CURRICULA

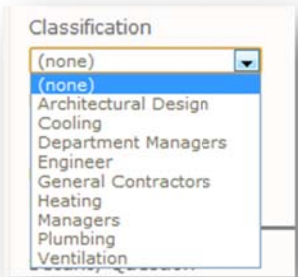
19.3 CREATE CURRICULUM

19.4 EDIT CURRICULUM

19.5 DELETE CURRICULUM

19.6 EXEMPTIONS

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.

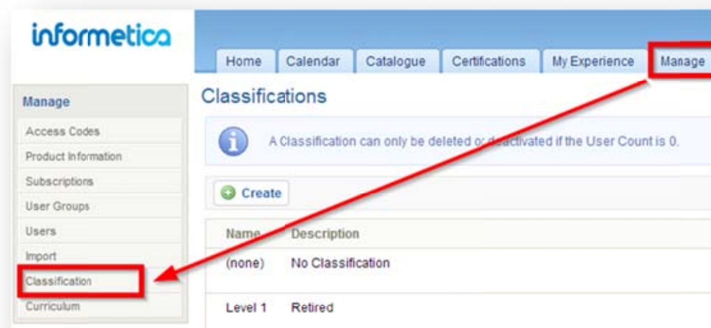
20.1 Managing Classifications

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.



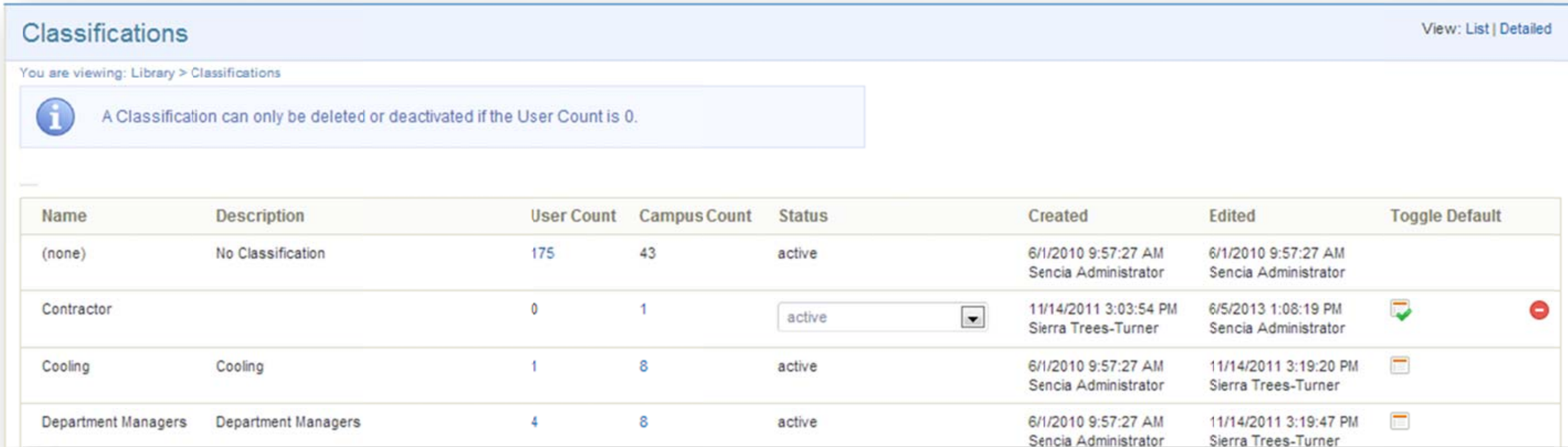


Table 1Brief description of the fields

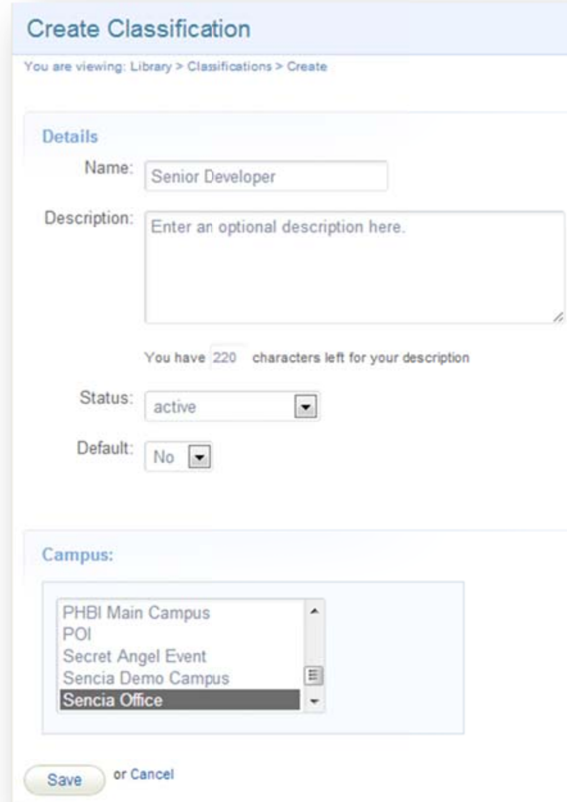
Field	Description	Interactive
Name	The name of the classification	No
Description	Shows the description text for the classification.	No
User Count Display Users	The number of users assigned to each classification. Select any user count to show a list of users with that specific classification.	Yes
Campus 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

20.1.1 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.	

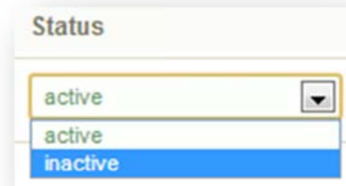


20.1.2 Add or Remove Campuses

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.

20.1.3 Change Status

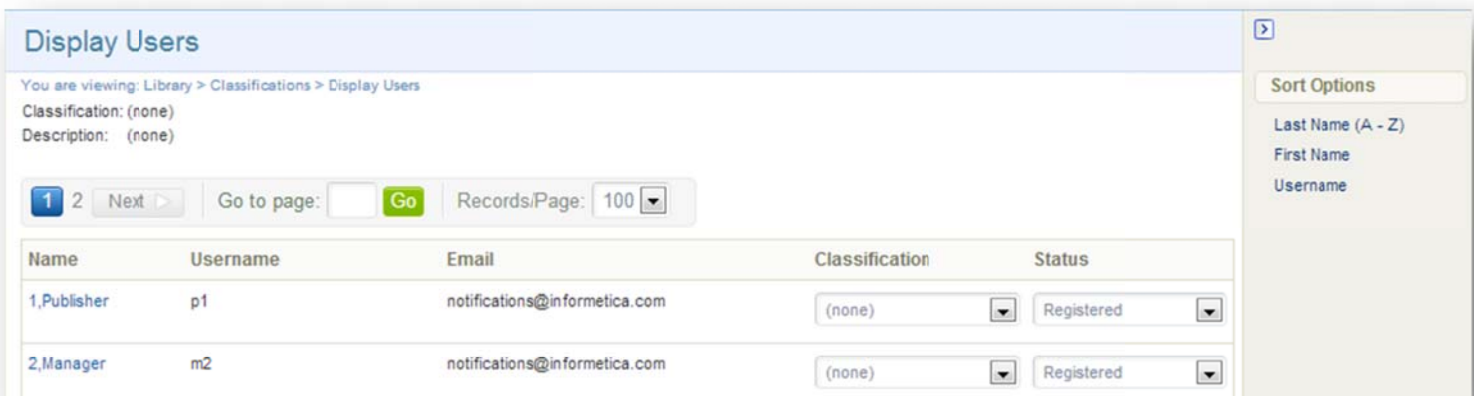
This feature is available to Site Managers.



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.

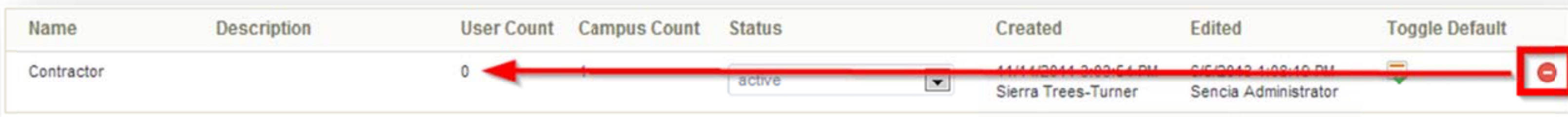
20.1.4 View Users

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.



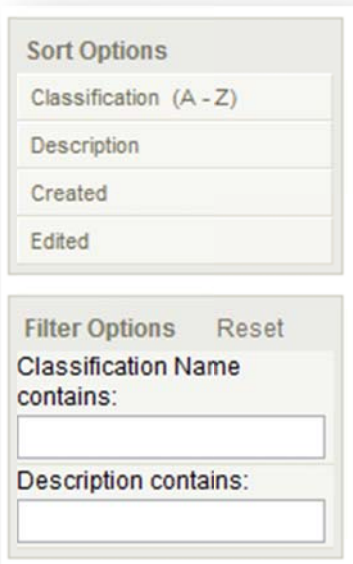
20.1.5 Delete Classifications

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.



20.1.6 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.

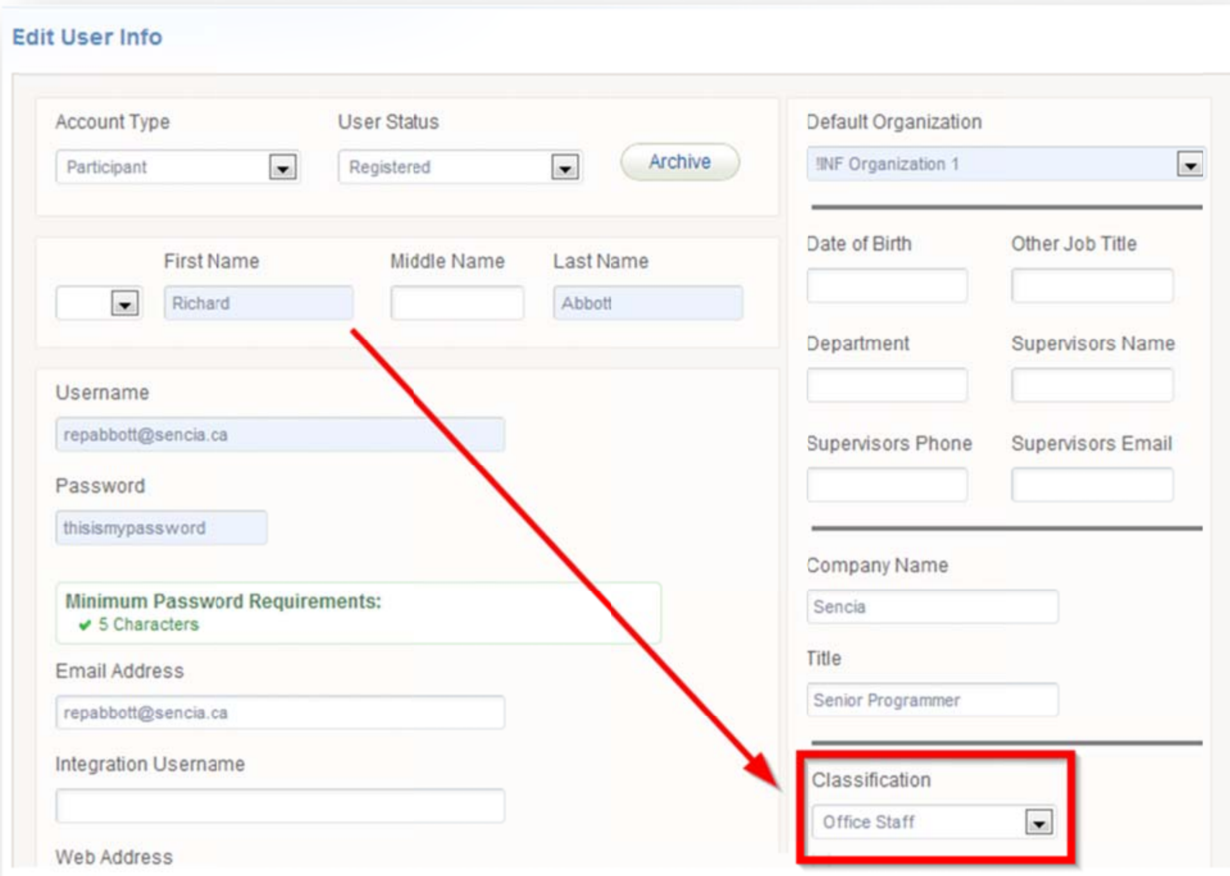


Below is a brief description of the fields:

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.

20.2 Assign Classifications to Users

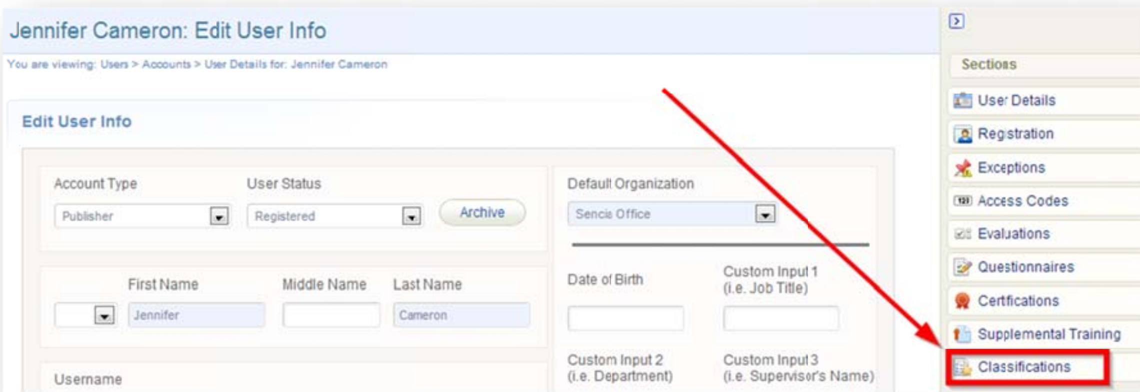
Navigate to the user's profile and select a classification from the drop down menu. The classification chosen is the user's default classification.

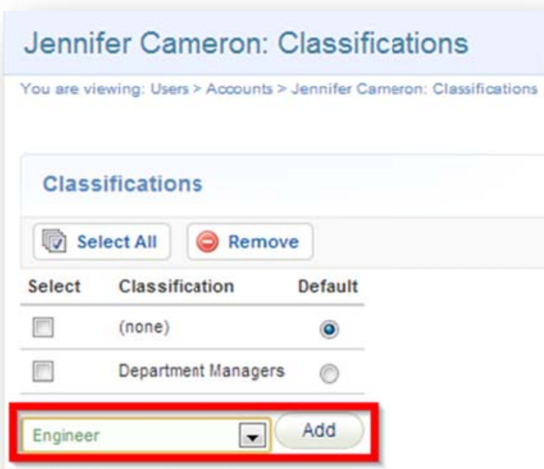


20.2.1 Multiple Classifications

This feature is available to Site Managers and Campus Admins.

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.





21. 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.

21.1 Topics Covered In This Chapter

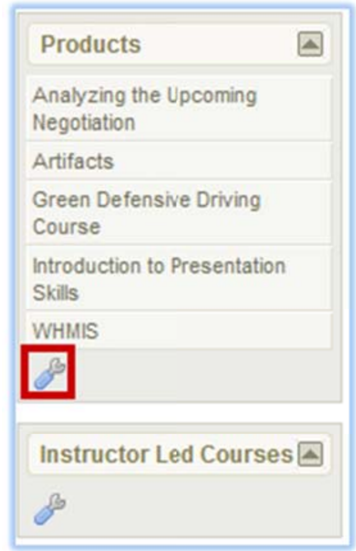
21.2 Products

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.

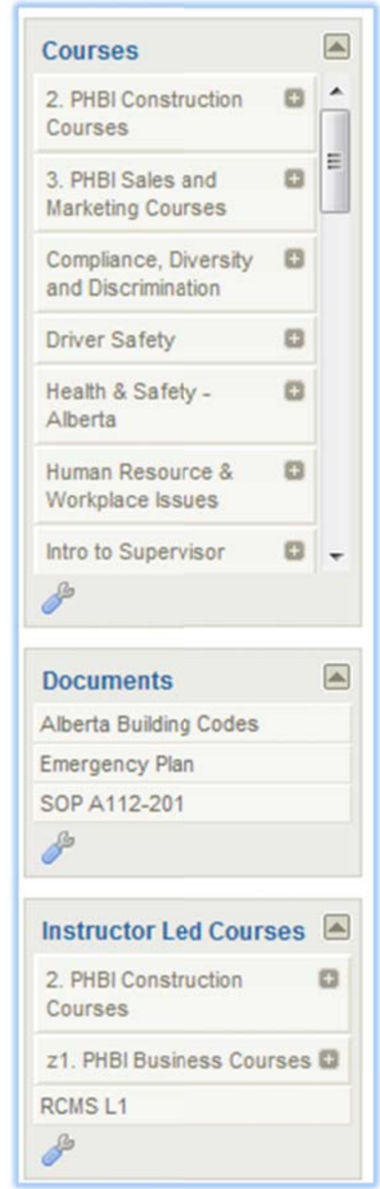
Inactive products or products that have publishing dates that fall outside of the current date are hidden from the product list on the homepage. Campus Admins and Publishers assigned to such products still have access, however.

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

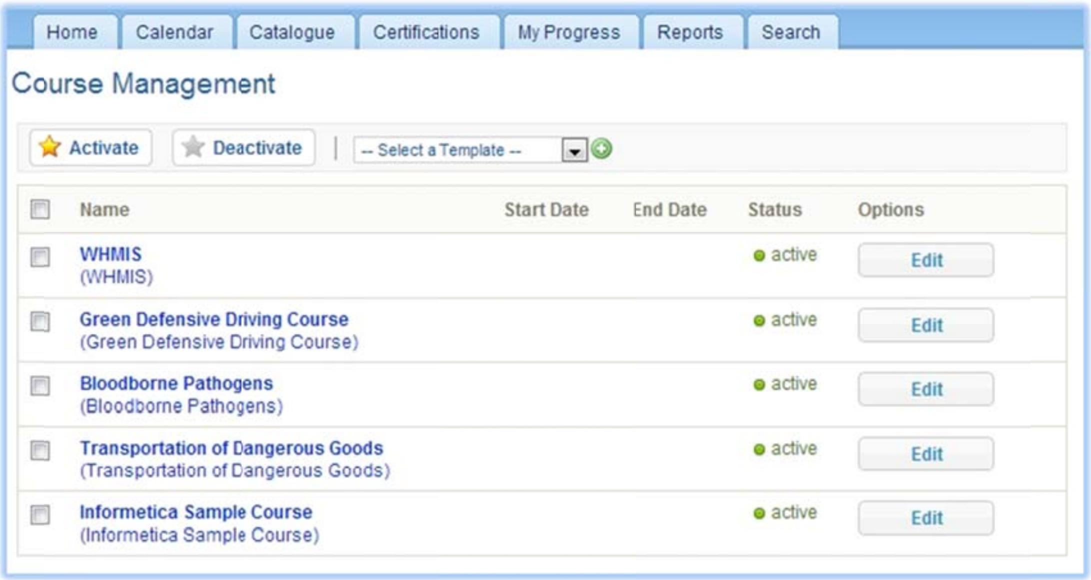


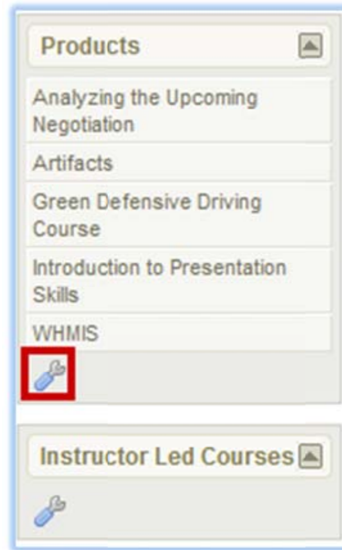
Home page shows separate containers for each product type



21.2.2 Product Management for Publishers and Campus Admins

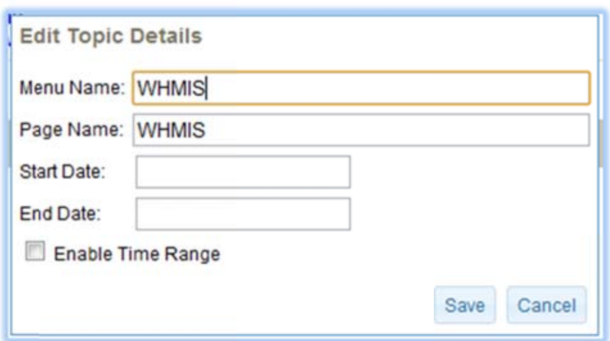
The wrench icon on the home page opens a management page where publishers and campus admins can view the products they are assigned to, edit titles and assets, change the status of an existing product, or create a new product. This is also where you can access inactive products that you are assigned 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.





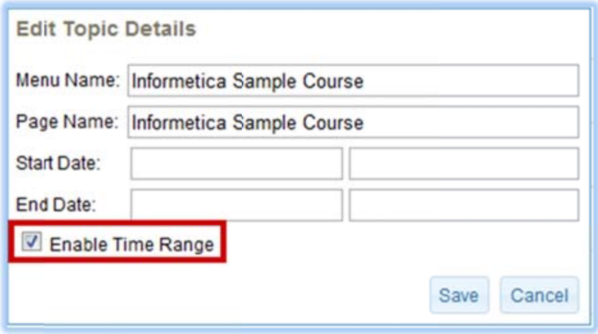
Edit a Menu or Page Name

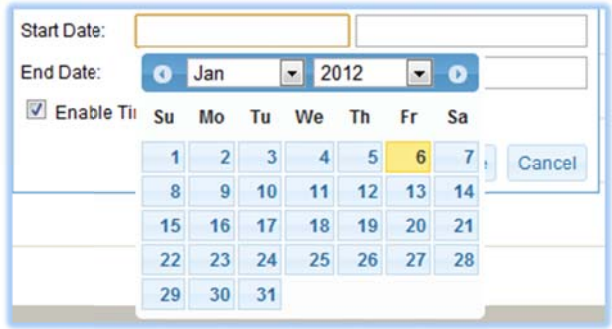
Click on the name of any product in the list to change the menu and page titles. The menu title shows in the products list and in side menus. This is often a short from of the page title. Note that left side menus have a limited amount of display; the longer your menu titles, the more cramped the display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

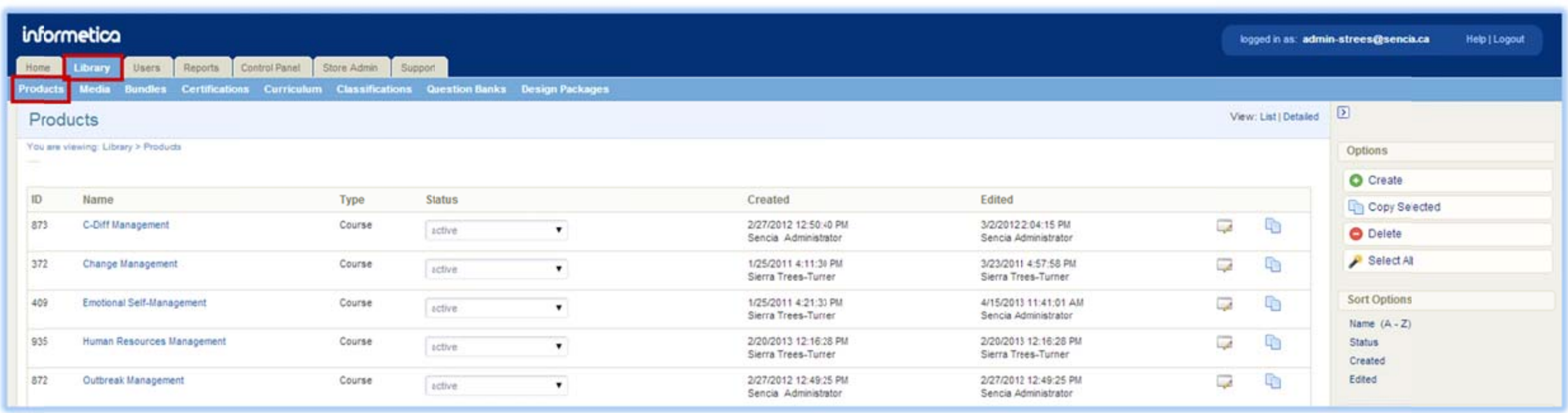




21.2.3 Product Management for Site Managers

The Product Library is only available to Site Managers.

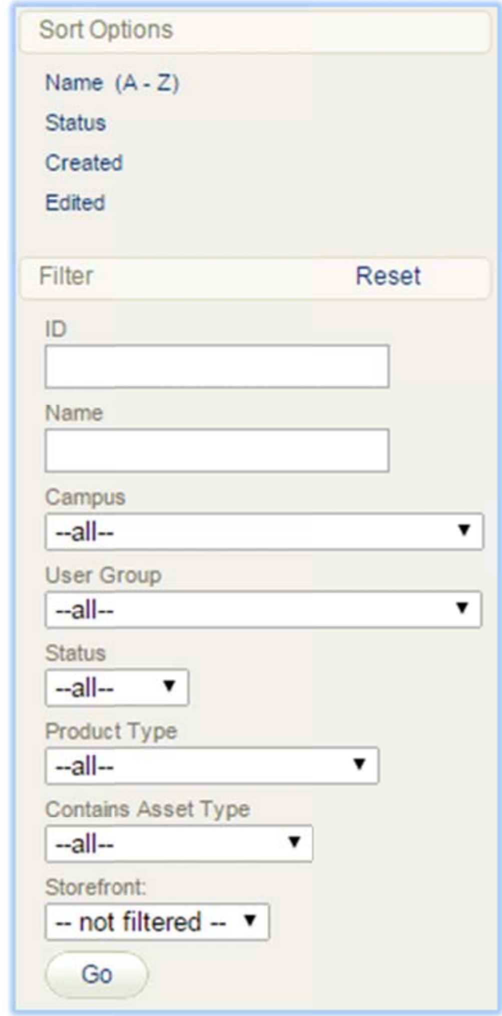
Informetica's library is where you can access the product and media libraries, bundles and certifications. The product library is where you can see all of the products that you have in Informetica. To open the product library, click the library tab and then the product library link.



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 and then select **Go**. This is particulary useful if you have many products.

Filter	Description
Reset	Choose the reset link at the top of the filter menu to remove any filters.
ID	Enter the unique ID automatically assigned to the product
Name	Enter a word or two that is contained in the name of the product.
Campus	Use the drop down menu to see only products assigned to a specific campus.
User Group	Use the drop down menu to see only products assigned to a specific user group.
Status	Use the drop down menu to see only products that are active or inactive.
Type	Use the drop down menu to see only products of a specific type.
Storefront	For eCommerce clients, sort the products by which store they are belong to.



Course Authors Must Have Access to Product Masters

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.

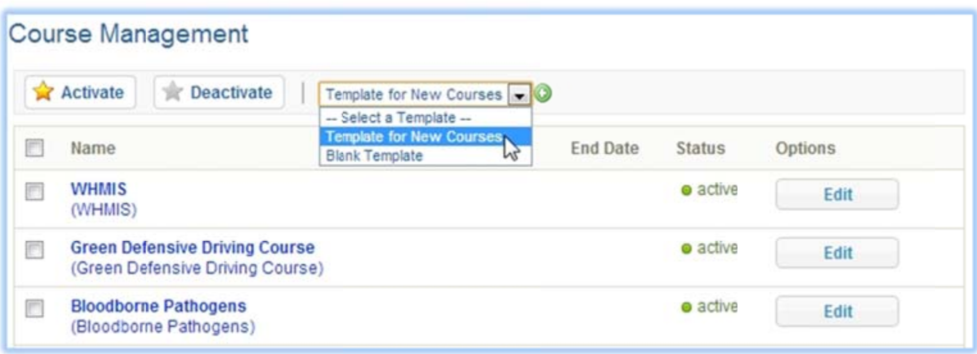
21.2.4 Create a Product

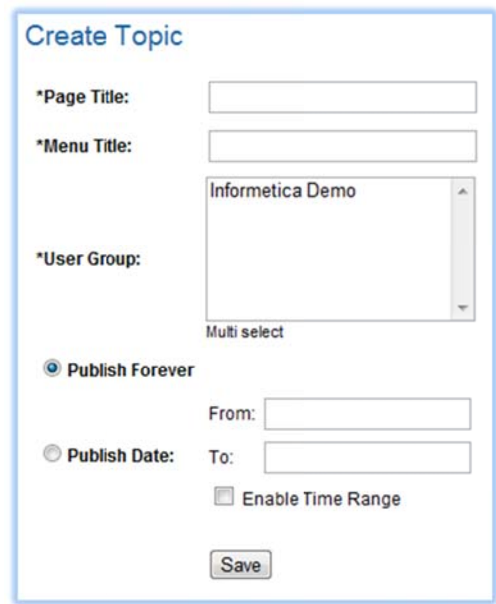
To fully create a product you will need to complete the following steps:

- Step 1 • Create a product
- Step 2 • Edit product details
- Step 3 • Write an optional introduction
- Step 4 • Create assets within the product

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.

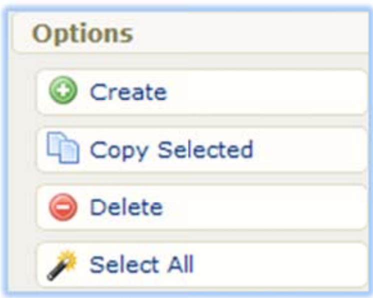


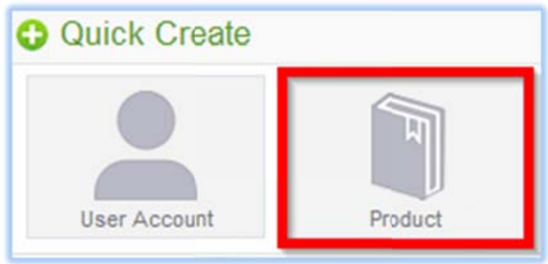


Create a Product: Site Managers

There are two methods to create a new product:

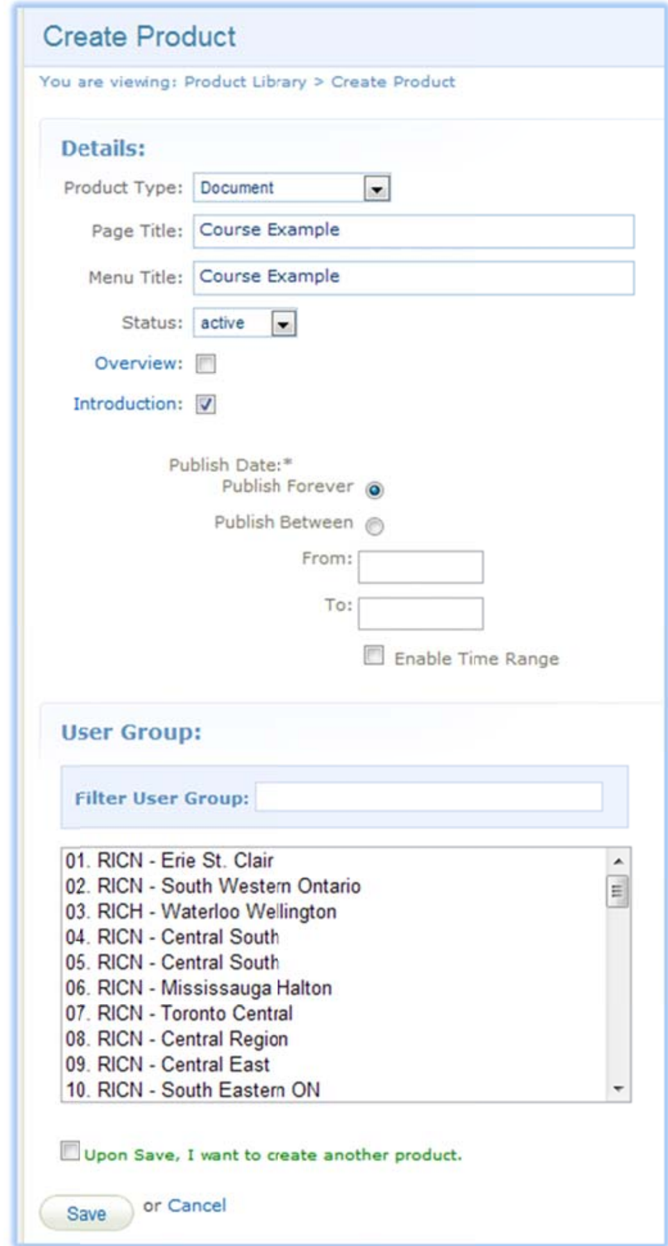
1. From the product library, select **Create** under the options menu or
2. Select Quick Create Product from the home page





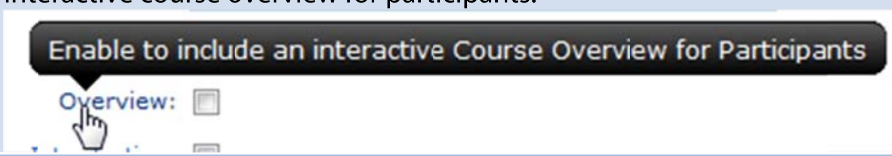
Master Products: Site managers must provide at least one master course to publishers and campus admins before they can create a new product. The master will determine the product type, so if your system uses more than one product type, make sure to create separate masters for each type that you want 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

21.2.5 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.

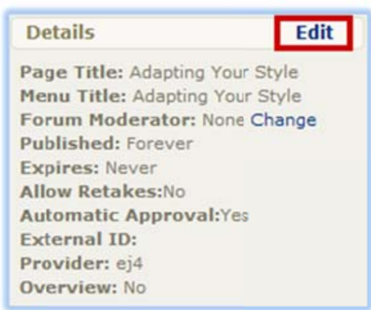
21.2.6 Edit Product Details

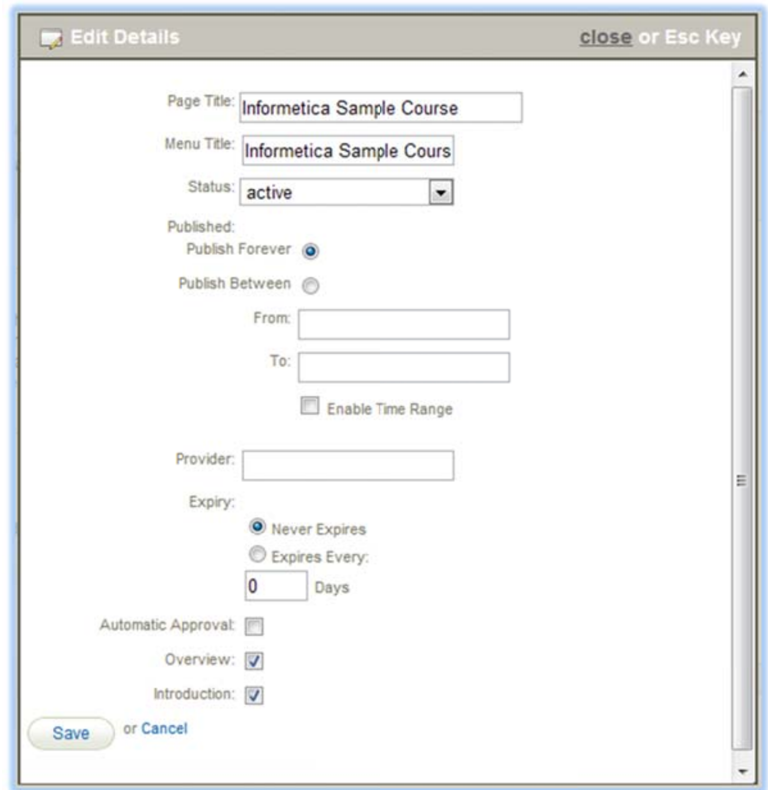
The product details are set up when the product is created. Editing details from the edit page offers some additional options that are not available when a product is initially created. The specific options available to you may differ and are based on your system's configuration. Therefore, you will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

Don't Forget to Activate Your Products

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

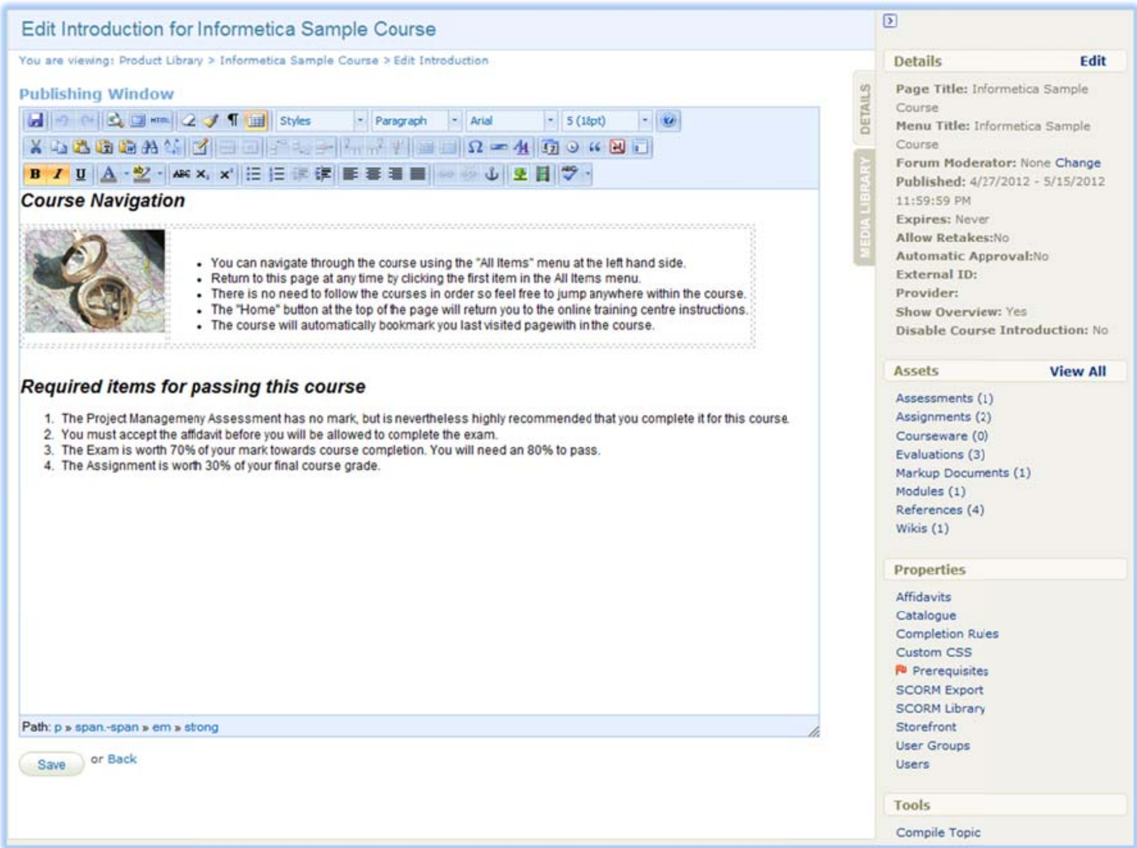




Field	Description	Input
Page and Menu Title	Enter the name of the product. The page title will show up on the top of online content pages. The menu title is what shows in the products list and in side menus. Note that menus have a limited amount of display; the longer your menu titles, the more cramped 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	For use with Informetica catalogue enrolments only. Check the box to automatically enrol 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

21.2.7 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.

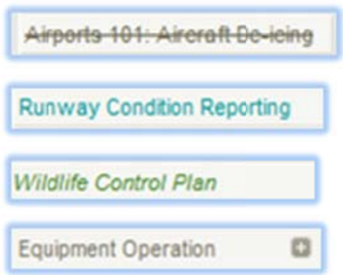


Hidden Introduction Conflicts

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.

21.2.8 Products Menu Legend

This legend is viewable only by desktop users, such as Instructors, Publishers and Campus Admins.

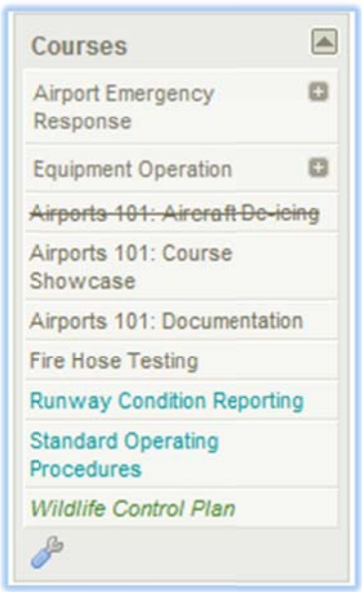


Products that have a ~~**strikethrough**~~ are not available to participants and are not seen when they log into Informetica. Changing a product's status to inactive will make it unavailable to participants as will changing the Publishing date.

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.

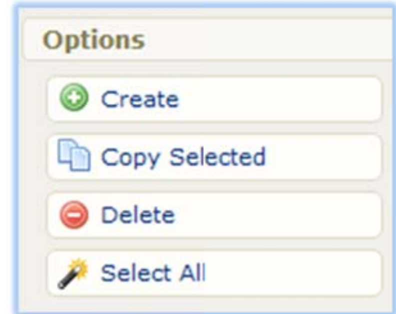
Names with a **+ plus symbol** next to them indicate that they are bundled products. Press the plus symbol to open the list of individual products within the bundle.



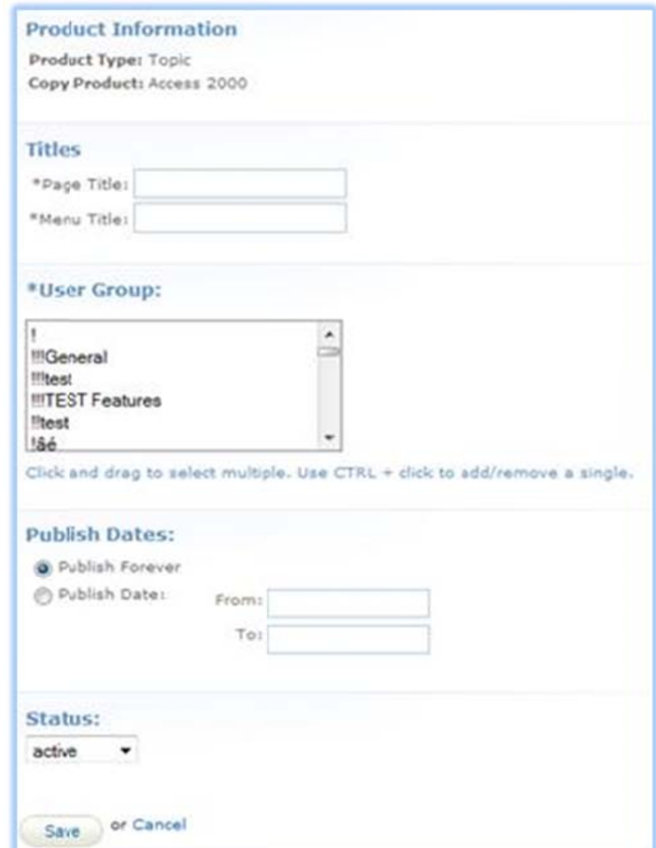
21.2.9 Copy a Product

This feature is available 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, all of which are required:



Field	Description
Page Title	This page title is the product name and will show up on the top of online content pages.
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.
User Group	Select a user group from the dropdown menu.
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.
Status	Select active or inactive from the dropdown menu.



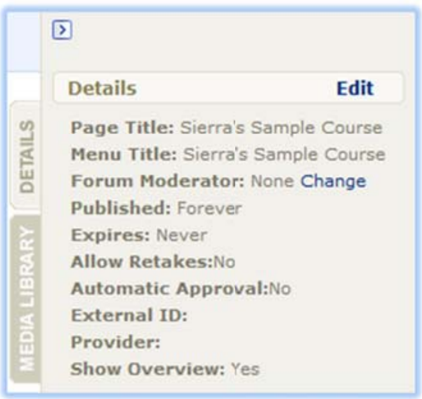
How to Copy if you are Not a Site Manager

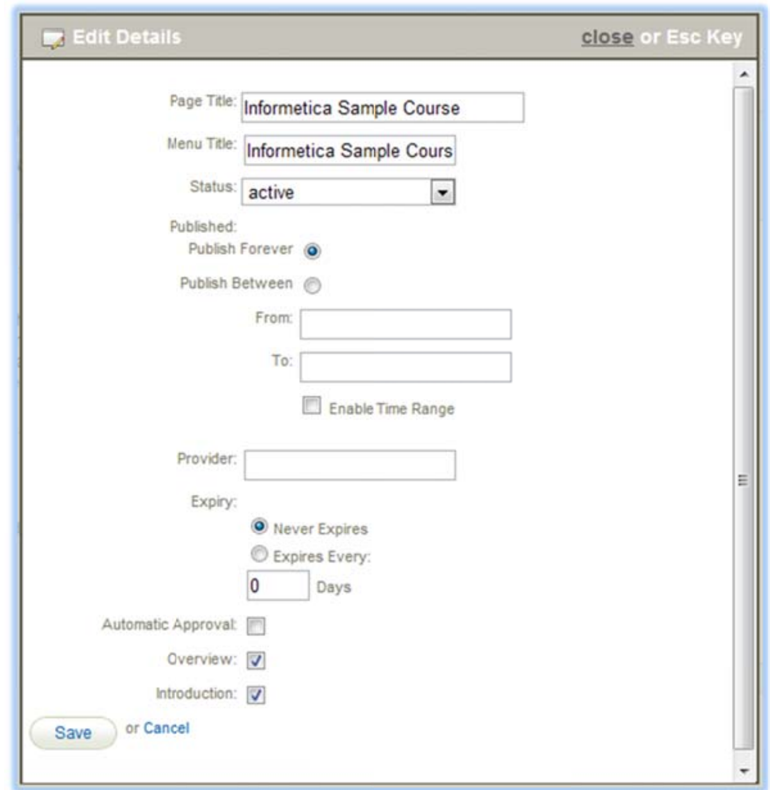
While campus admins and publishers cannot copy over an entire product, they can copy the assets from one product into a new product and recreate any information from the introduction page.

21.2.10 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.

21.2.11 Properties and Tools Menus

This feature is available to Site Managers.

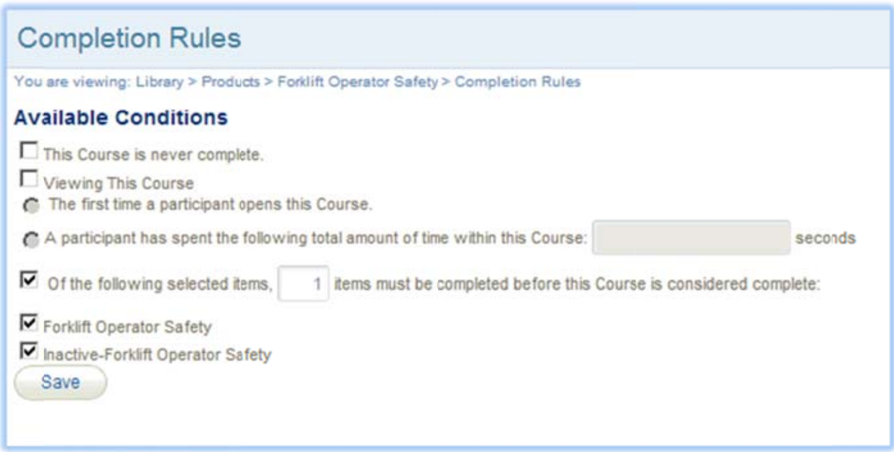
Open any product to view the Properties menu. This menu gives you access to some additional tools and information about the product.

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.

21.2.12 Completion Rules at the Product Level

This feature is available to Site Managers.

Completion rules are optional conditions that must be satisfied by a participant before a product is considered completed. 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.



Grades and Certifications

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

Completion Rules Affect the Following Areas:

- Completion Reports
- Home Page Context Menu Styles
- Product Completion Emails

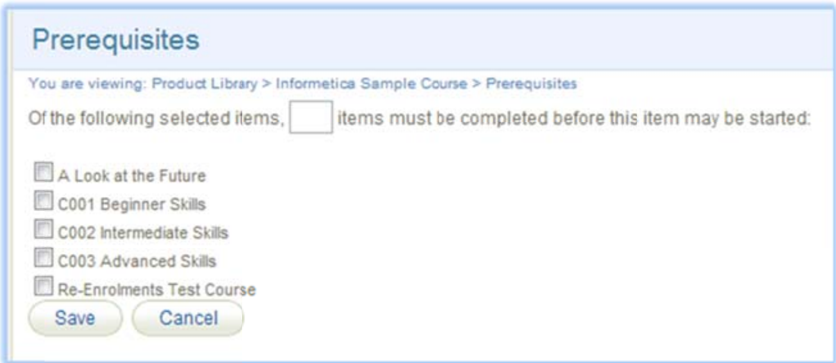
Available Completion Rules

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.

21.2.13 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.



Create Completion Rules First

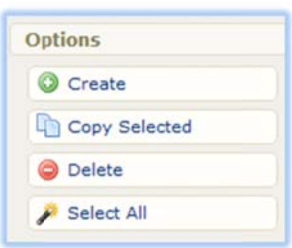
Completion rules must be set up prior to creating prerequisites

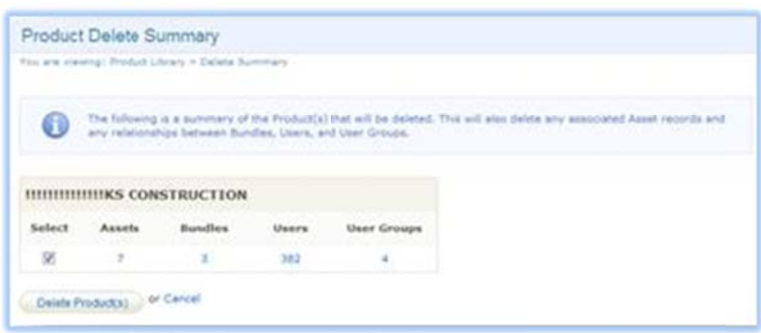
Enter how the number other products that need to be completed before this specific product can be accessed. Use the check box to select the products that need to be completed as prerequisites, and click the save button.

21.2.14 Delete Products

This feature is available 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 is Permanent

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

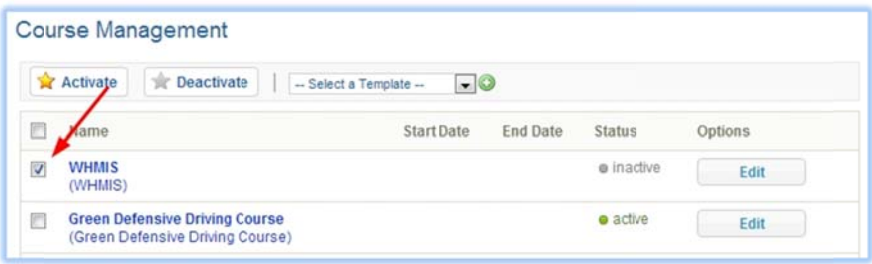
The product summary lets you view all of the products you selected and confirm their deletion. Select the delete product(s) button or cancel. After deleting or canceling, you will be brought back to the product library page.

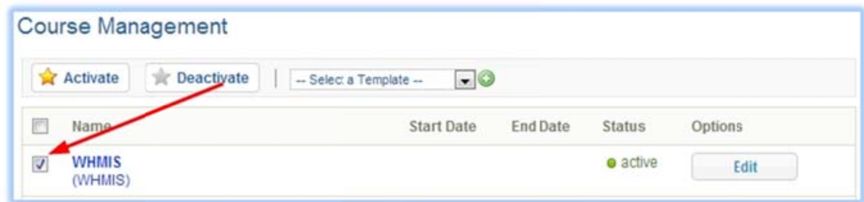
21.2.15 Activate or Deactivate a Product

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.





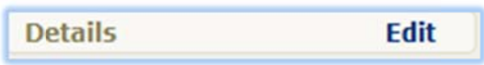
Site Managers

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).

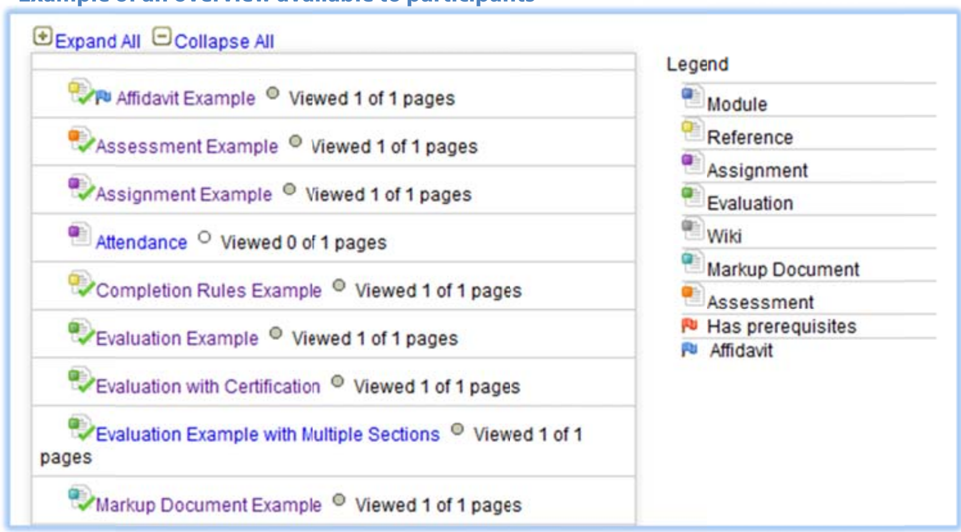
21.2.16 Overview Page

Overview is like an interactive map of the course that shows all of the available assets within a product. It also shows the asset type, visibility, page views, and prerequisites. The names of the assets are also links that will take the user directly to that asset. If utilized, the overview page is available as a menu item accessible by participants, instructors, publishers, and campus admins, depending on system configuration.

To enable the overview, open the product, then from the product details column, click edit and click the box to check to show overview . Click the save button. Below is an example of an overview within a product as it appears to participants.



Example of an overview available to participants



21.3 Assets

Multiple content components can be incorporated into your content to suit your ideal learning needs. You can create the content within Informetica 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.

Products must be Active

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

Flags and Strikethroughs

Users may see various flags in front of assets when they launch a course, view the overview page, or reorder assets. Each flag colour indicates something distinct about the asset. Note that these flags are not visible from site manager view.

The orange flag indicates prerequisites.

The blue flag indicates an attached affidavit.

The grey flag indicates a hidden asset.

~~Strikethrough~~ indicates that the item is not available to participants. The strikethrough is seen by campus admins and publishers when an asset is an appraisal or has a publishing date that is before or after the current date.

21.3.1 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. Opening a product will reveal a list of the assets within it displayed on the left.

Manage Assets for Informetica Sample Course

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	3/26/2014 2:27:08 PM Amy Bateman	Not Applicable	Edit
6184	Assignment Example (Assignment Example)	Assignment	4	active	3/29/2011 3:37:19 PM Sierra Trees-Turner	6/24/2014 3:33:06 PM Sierra Trees	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
9016	Evaluation Example with Multiple Sections (Evaluation Example with Multiple Sections)	Evaluation	9	active	3/8/2012 11:32:09 AM Sierra Trees-Turner	3/30/2012 9:59:23 AM Sierra Trees-Turner	Not Applicable	Edit

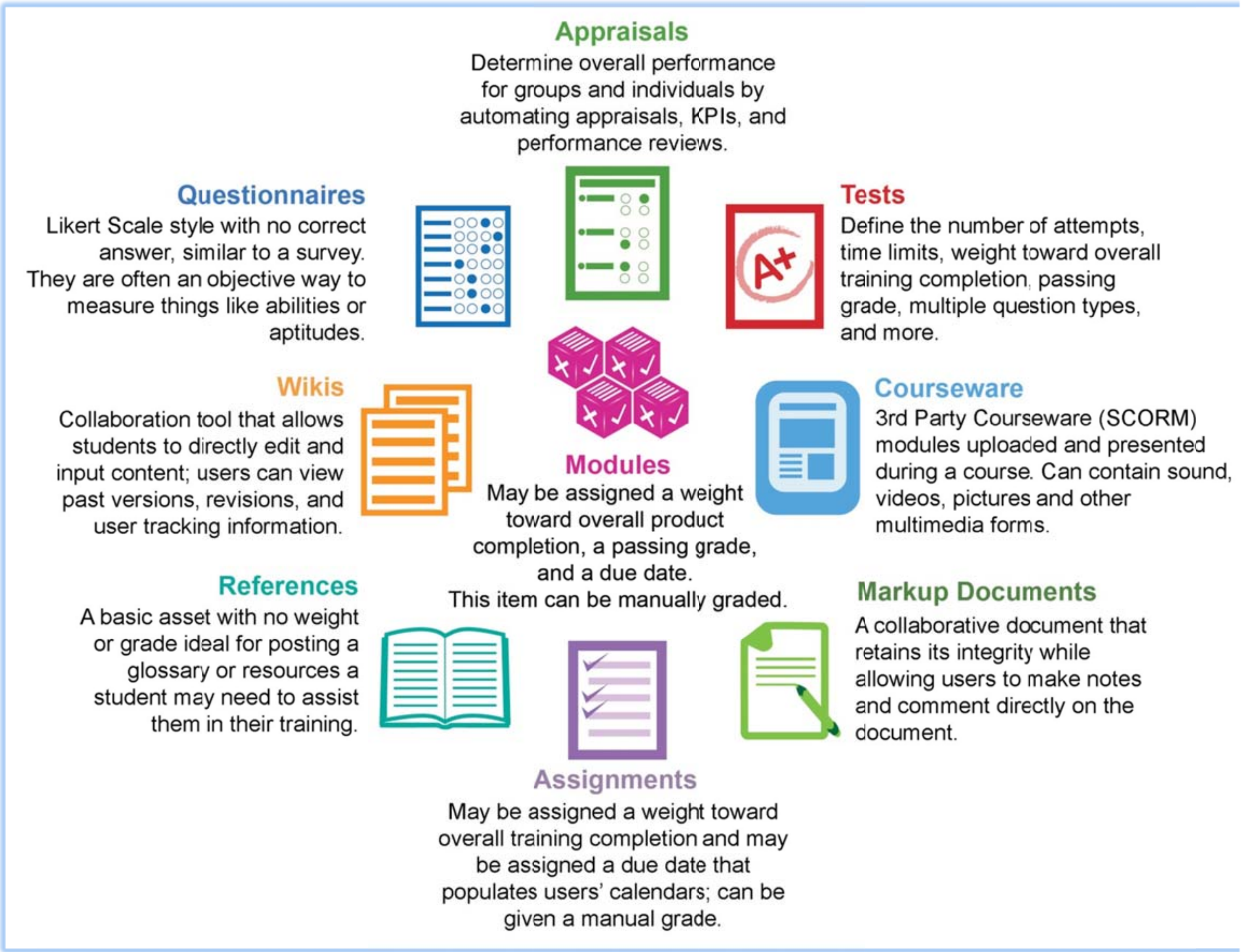
Site Manager Navigation

To navigate to the manage assets page, open a product and select 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.

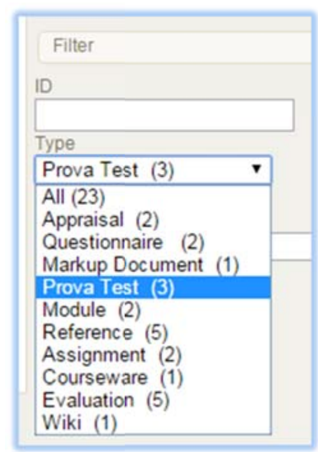
Campus Admin and Publisher Navigation

To navigate to the manage assets page, select an active product. The assets will be listed on the left. To see the Manage Assets page, click (wrench tool) and change the Filter Type to **All**.

21.3.2 Types of Assets


Appraisals
Determine overall performance for groups and individuals by automating appraisals, KPIs, and performance reviews.
Questionnaires
Likert Scale style with no correct answer, similar to a survey. They are often an objective way to measure things like abilities or aptitudes.
Tests
Define the number of attempts, time limits, weight toward overall training completion, passing grade, multiple question types, and more.
A+
Wikis
Collaboration tool that allows students to directly edit and input content; users can view past versions, revisions, and user tracking information.
Modules
May be assigned a weight toward overall product completion, a passing grade, and a due date.
This item can be manually graded.
Courseware
3rd Party Courseware (SCORM) modules uploaded and presented during a course. Can contain sound, videos, pictures and other multimedia forms.
References
A basic asset with no weight or grade ideal for posting a glossary or resources a student may need to assist them in their training.
Markup Documents
A collaborative document that retains its integrity while allowing users to make notes and comment directly on the document.
Assignments
May be assigned a weight toward overall training completion and may be assigned a due date that populates users' calendars; can be given a manual grade.

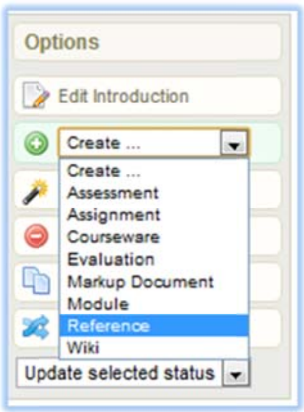
21.3.3 Filter


Filter
ID
Type
Prova Test (3)
All (23)
Appraisal (2)
Questionnaire (2)
Markup Document (1)
Prova Test (3)
Module (2)
Reference (5)
Assignment (2)
Courseware (1)
Evaluation (5)
Wiki (1)

You can filter the assets to show only one asset type by selecting from the drop down list in the left side menu (for example all Prova tests within a product). You can also enter an ID to find a specific asset.

21.3.4 Create

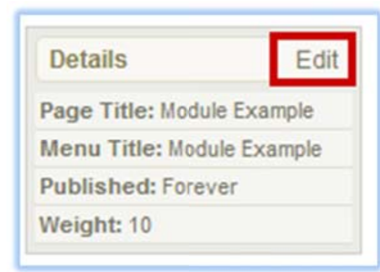
To create a new asset, return to the manage assets page then on the left side menu, click the drop down arrow next to Create and select the type of asset from the dropdown menu. To edit these details, click on edit next to the details column on the right. Enter the details and then save. You will then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



Importance of a Page Title

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.

21.3.5 Edit



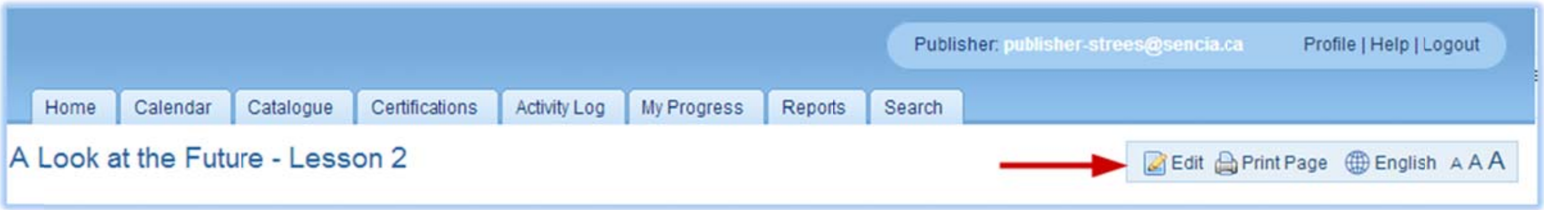
You can make any changes you like to an asset page, with the exception of a test already in progress. You can also make changes to the choices made during initial creation, such as the title of the asset, by clicking the edit link from the details column. See the introduction chapter for more information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

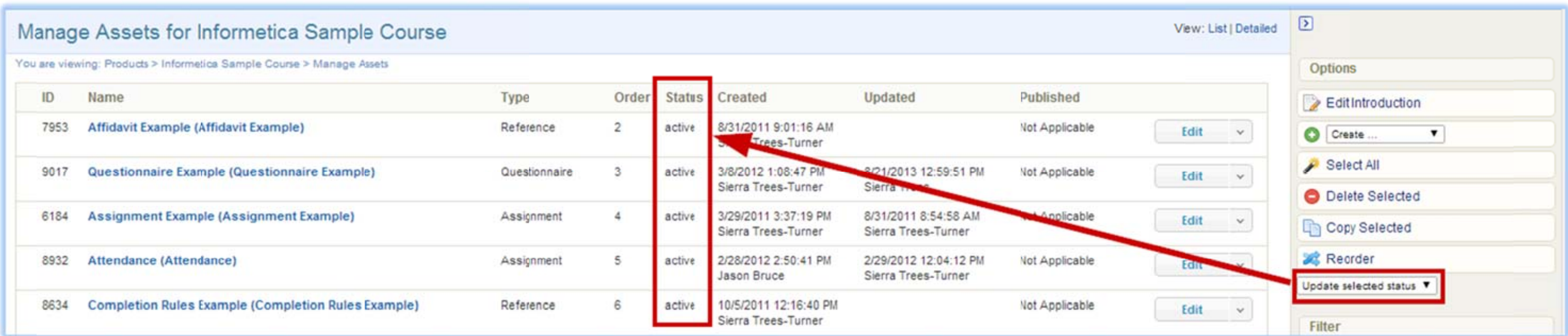
This feature is available to Campus Admins and Publishers.

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.

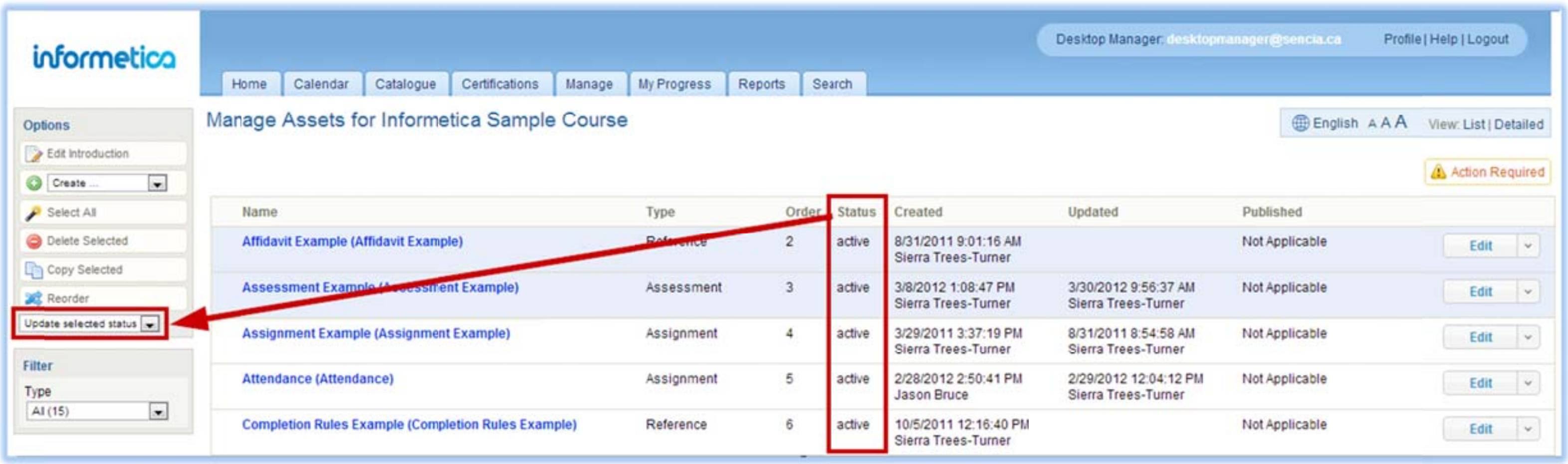


21.3.6 Status

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:

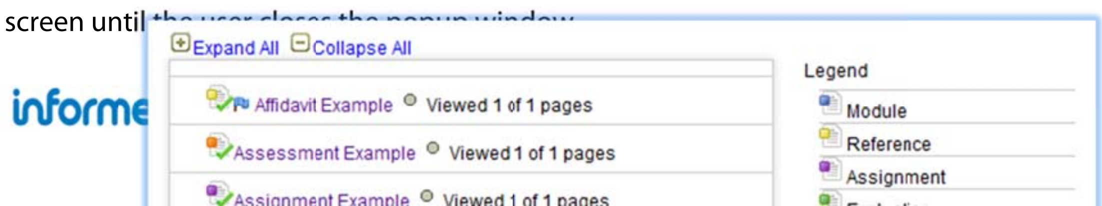
Active – An active status means that the asset is available to be accessed by anyone registered to an active course.

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 (unless you have asked us to toggle that feature off for your site), 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



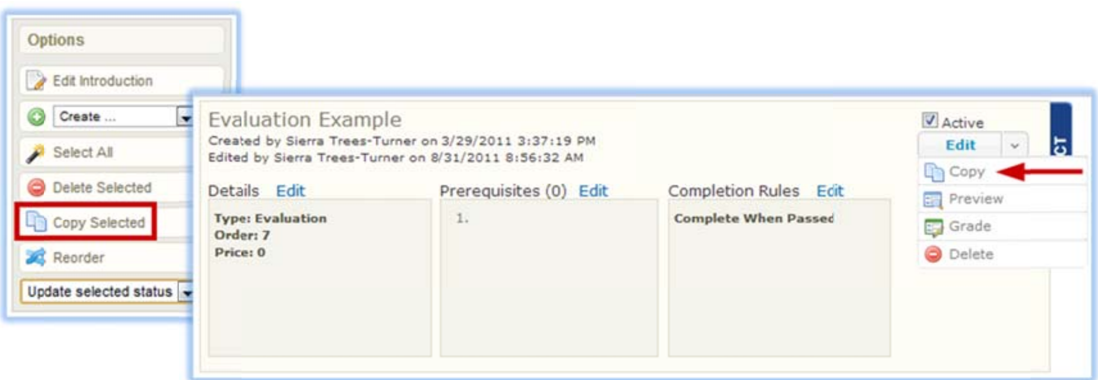
Overview Only – This status means that the asset will not show up for participants in any menus, but will appear only in the overview, if activated. See Overview Page in the Products portion of this chapter for more details.

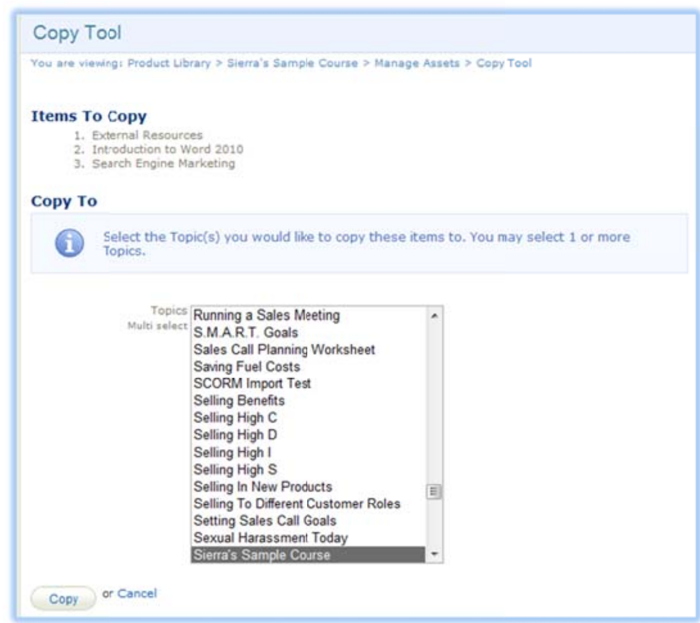
Nested assets –Nesting an asset hides it from user menu without giving it a hidden status. For more details, see the Reorder portion of this chapter.

> **Leaving the Nest**
>
> 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.

21.3.7 Copy

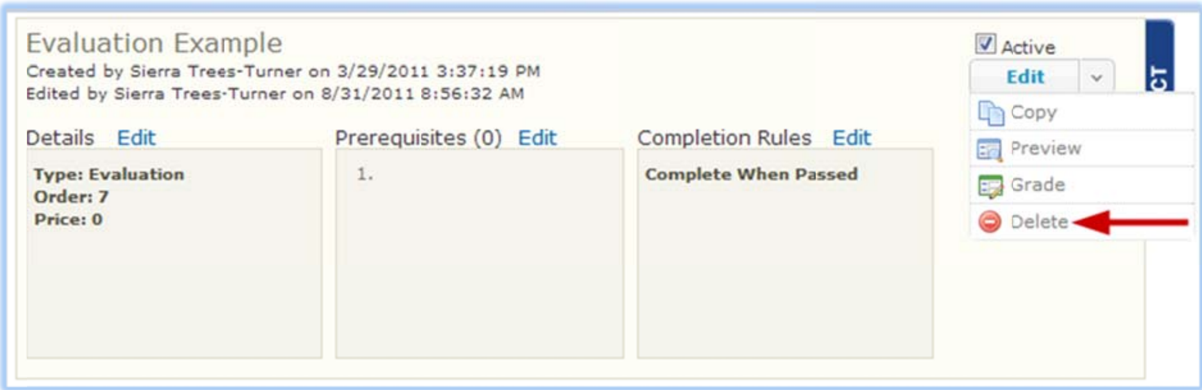
From the manage assets page, you can press the down arrow next to the Edit button of any asset, and then click copy. Alternatively, if you have several assets to copy at once, then you can select several from list view and click on the copy selected link from the options menu. This will open the copy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





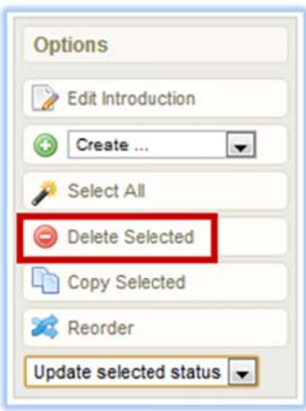
21.3.8 Delete

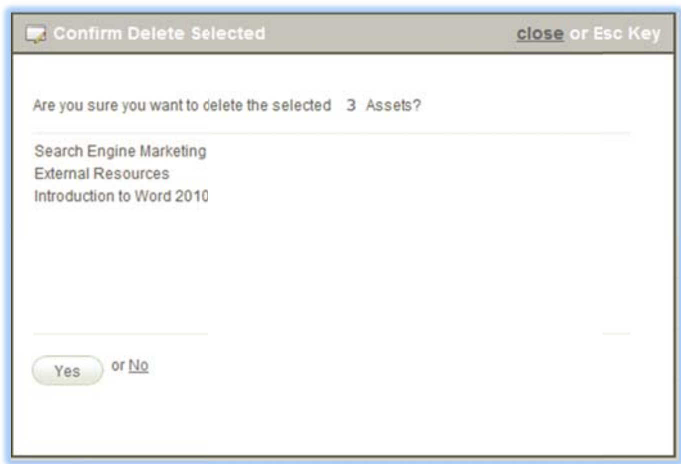
From the manage assets page, you can press the down arrow next to the edit button of any asset, and then click delete. Alternatively, if you have several assets to delete at once, then you can select them from list view and click on the delete selected link from the options menu on the right. Either 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

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

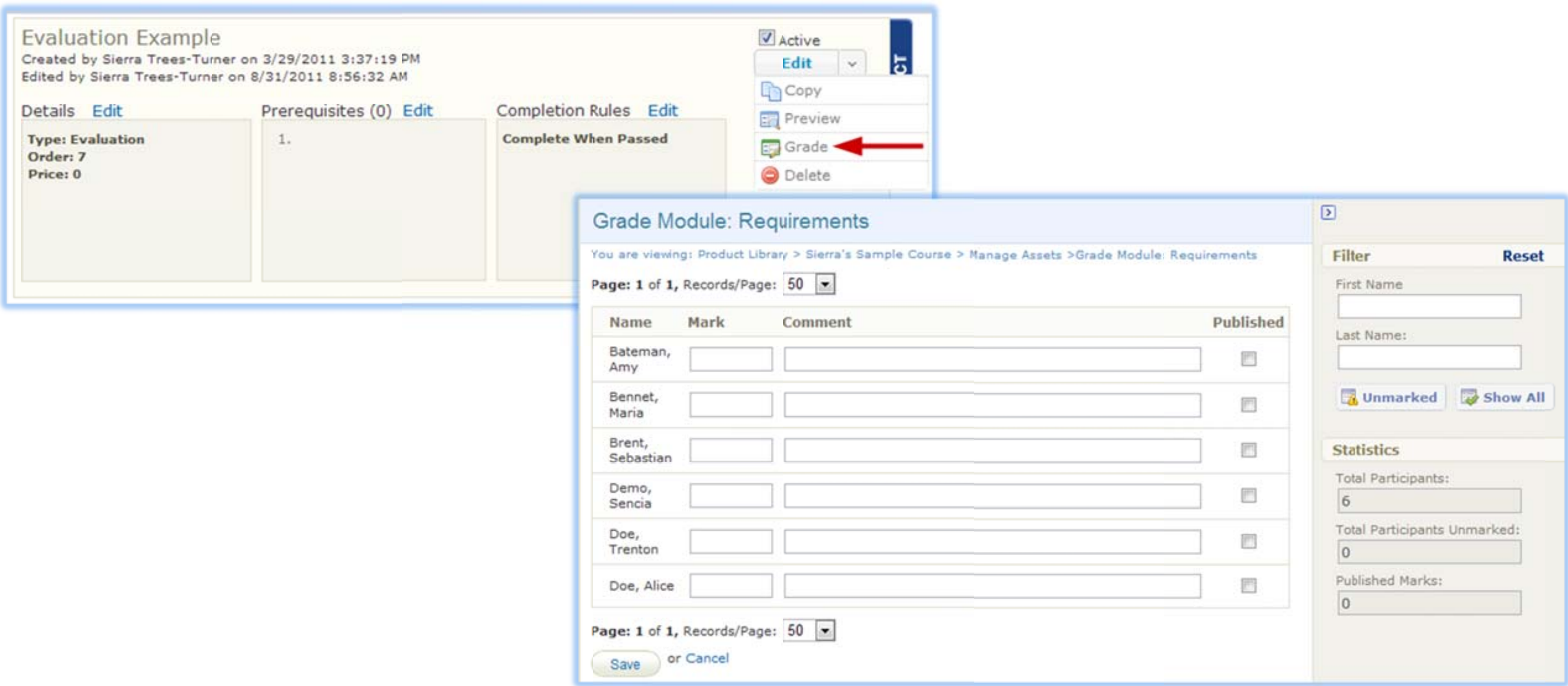




21.3.9 Grade

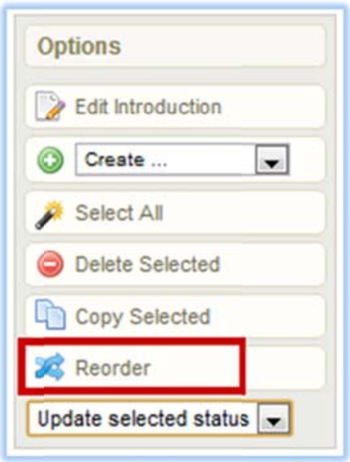
From the manage assets page, you can manually grade any assets that have a grading option (such as modules, assignments and essay questions in evaluations).

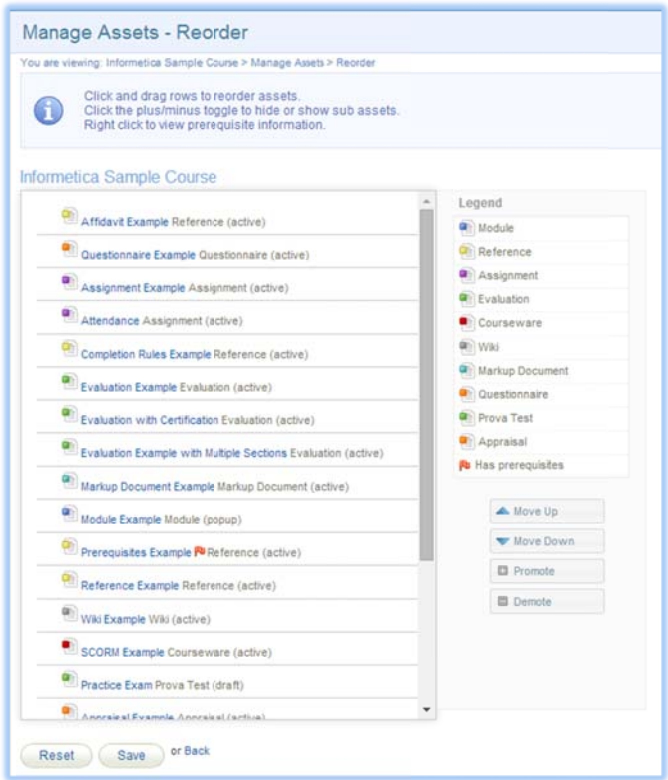
Select **Grade** within the asset's information box to open the grade screen where you can add a mark (0-100) for individual participants, add comments, and publish the grade so it will be displayed on the participant's transcript. The example below is the grade screen from a module asset type, but each 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.



21.3.10 Reorder

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. **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.





Here is a legend of the icons seen in the reorder tool:

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 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.

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

Overview

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.

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 assets

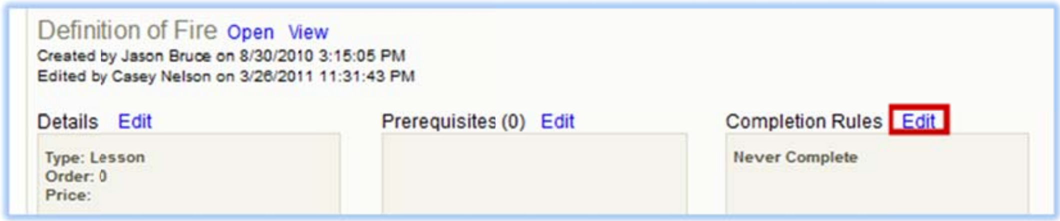
Example of expanded assets

When to Use Nesting

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 asset is not accidentally marooned, making it impossible for users to navigate to it.

21.3.11 Asset Completion Rules

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.

Set Completion Rules First

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

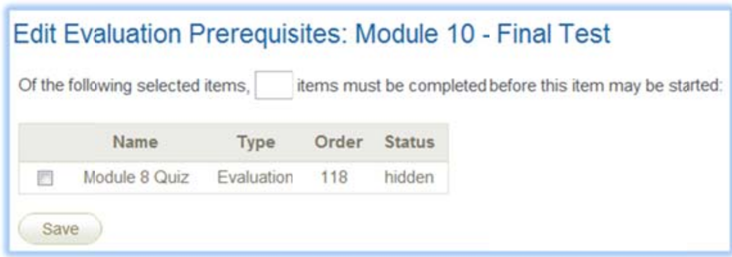
Asset Type	Never Complete (Default)	First Time View	Timed View	Passing This Item	Pass Rate	Affidavit Acceptance
Reference	Y	Y	Y	N	N	Y
Module	Y	Y	Y	Y	Y	Y
Assignment	Y	Y	Y	N	N	Y
Questionnaire	Y	Y	Y	N	N	n/a
Evaluation/Prova	Y	N	N	Y	Y	n/a
Mark Up Document	Y	Y	Y	N	N	n/a
Wiki	Y	Y	Y	N	N	n/a
SCORM	Y	Y	Y	Y	N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

Which Assets Have Completion Rules?

Not all asset types have every completion rule available. See the table for a complete list.

21.3.12 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”.

Set Completion Rules First

Completion rules must be set up prior to creating prerequisites.

21.3.13 Affidavits

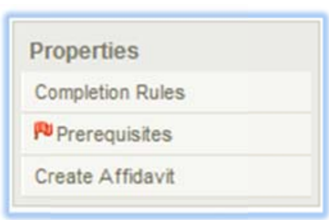
An affidavit is a formal statement that a user must agree to or read before beginning a course. To create an affidavit, you will need to associate it with a specific asset. If the affidavit is for the entire product and not just the one asset, then it should be attached to the first asset in the product. You can even create a new empty asset specifically for the affidavit alone. Affidavits 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.

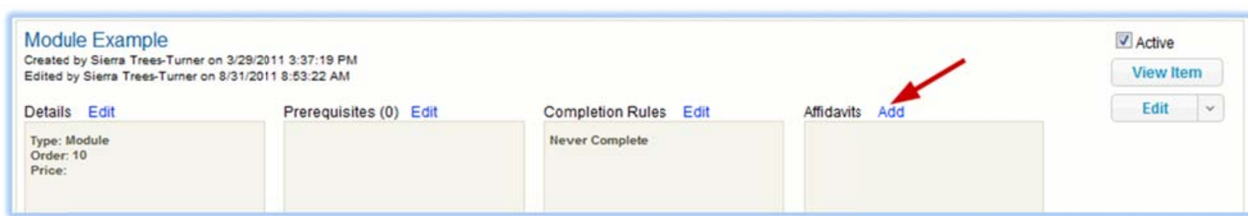
Which Asset Should I Use?

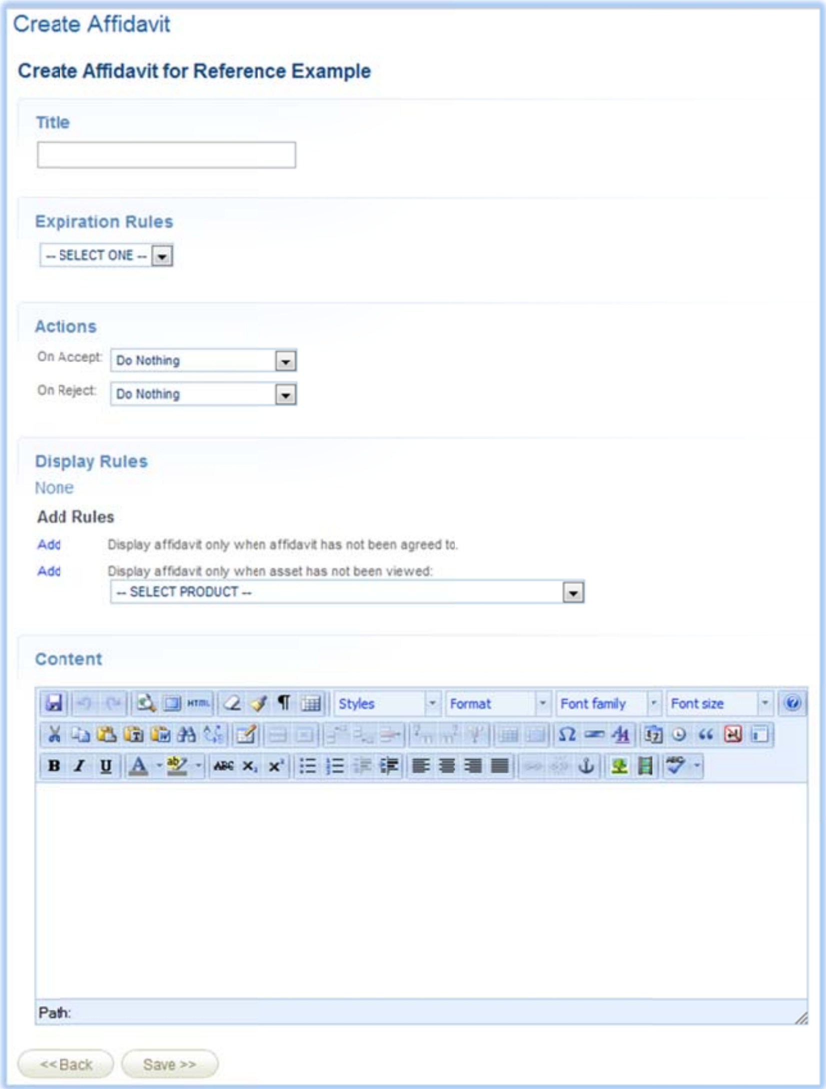
If you do not have grade or date considerations, then a Reference is the preferred Asset to use. If you do have grade or date considerations, then a Module is one of the preferred asset types to use.

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. 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, 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.

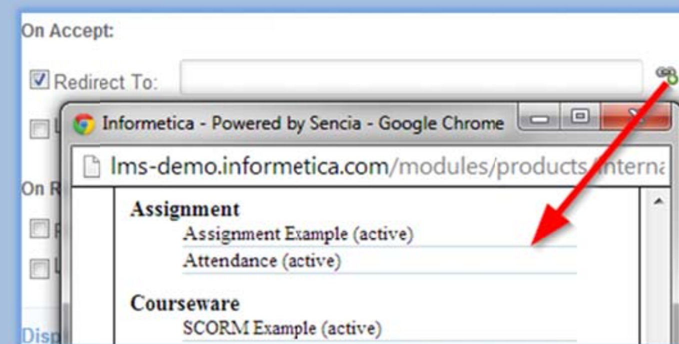






<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Title</td><td>Enter a name for the affidavit.</td></tr>
<tr><td>Expiration Rules</td><td>Select the expiration rules from the drop down menu (Immediately, number of days or never expire).</td></tr>
<tr><td>Actions</td><td>Select from the drop 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.

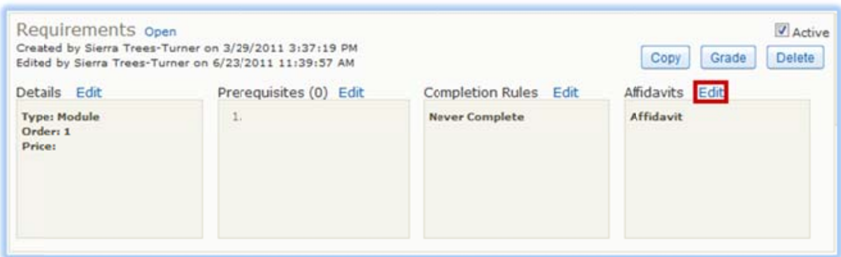


Lock the following asset: Select an asset from the drop down list and the participant will no longer have access to that asset page.
</td></tr>
<tr><td>Display Rules</td><td>Press the add button Add to select one of the premade rules. You can add as many rules as you need.

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.
</td></tr>
<tr><td>Content</td><td>Design the affidavit text and content using the publishing window.</td></tr>
<tr><td>Save</td><td>Click the save button. After saving, you will be returned to the asset's publishing window.</td></tr>
</table>

Edit an Affidavit

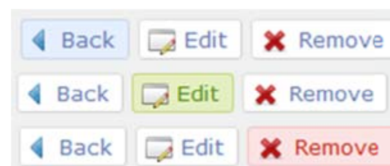
From the manage assets page, select **edit** next to the affidavits column under the asset you wish to an affidavit within.



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.

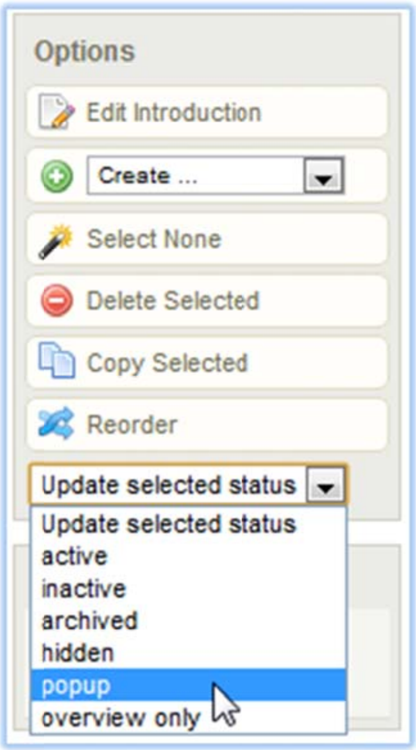
Title – Shows the name of the affidavit, including any former titles it has had.
Created by – Lists the name of the manager who created the update.
Days to Expire – Indicates how many days the affidavit is valid before needing to be accepted again, if applicable.
Content – Shows the content text from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

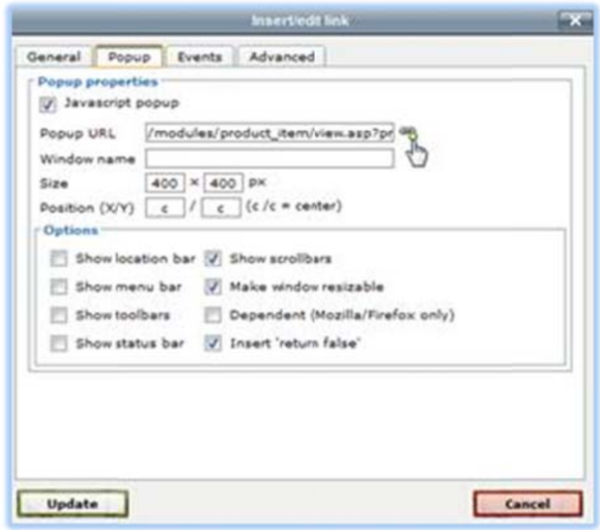
Editing Affects Users

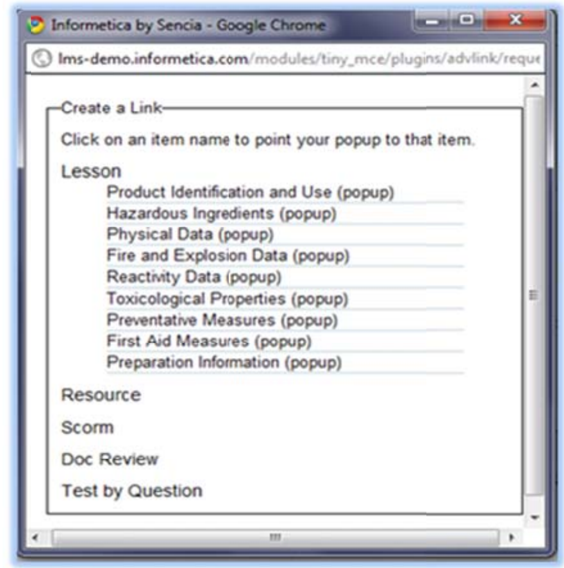
Editing an affidavit will require everyone who already accepted the affidavit prior to the changes to re-accept the updated affidavit when they revisit it.

21.3.14 Popup Window Creation

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.

21.4 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.

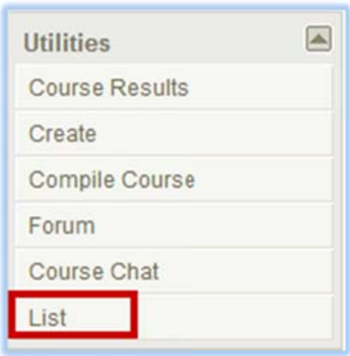
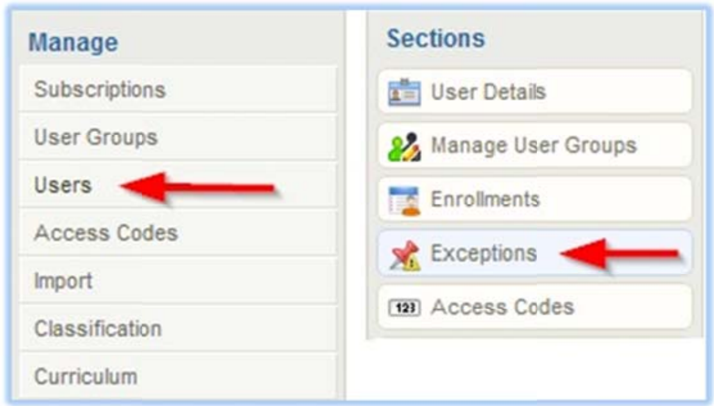
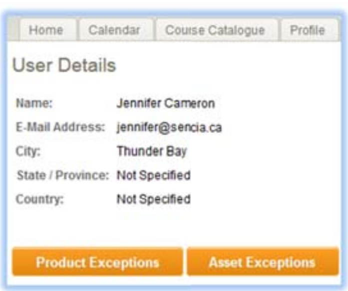
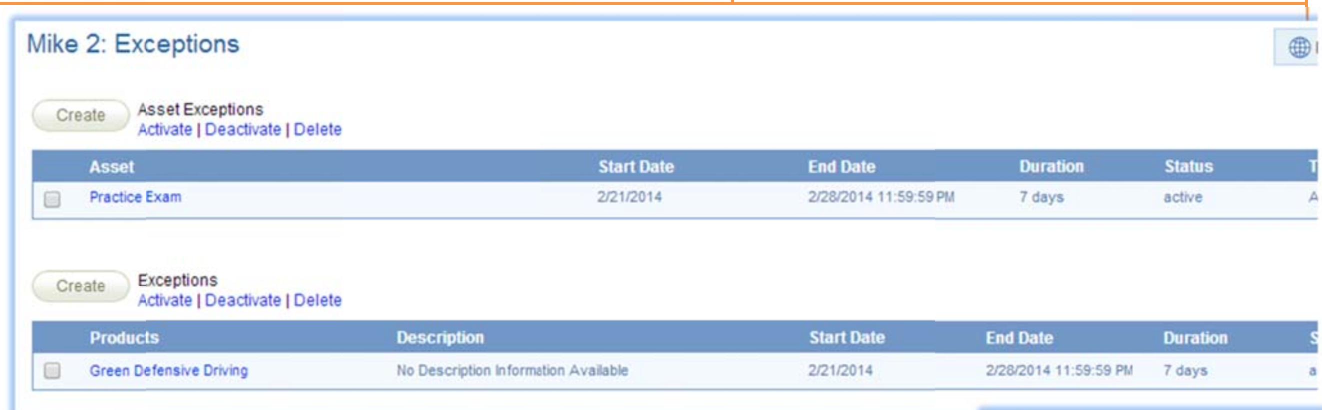
	Publishing Dates	Expiry	Inactive	Deletion
Characteristic	A product or asset made available during specific publishing dates cannot be accessed by any enrolled participants outside of those dates. Publishing dates affect all enrolled users simultaneously.	Expiry determines the duration in days that a 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

21.5 Exceptions (Extensions)

This feature 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

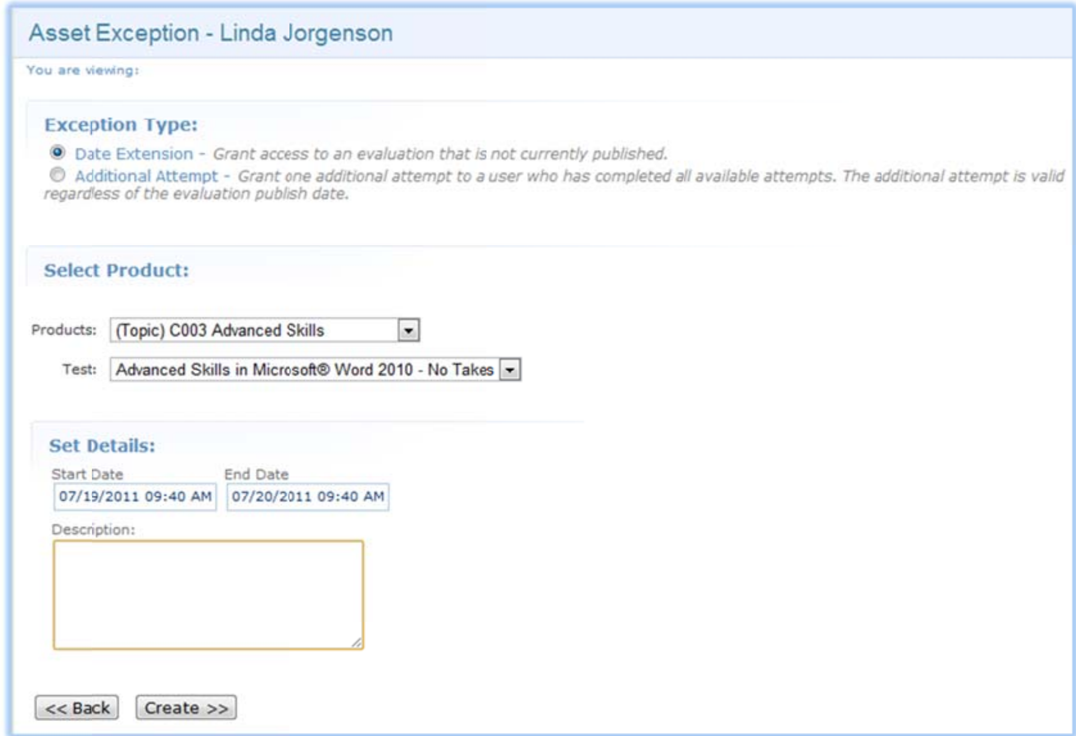
<table>
<tr><th>Publishers & Instructors</th><th>Campus Admins & Campus Managers</th><th>Site Managers</th></tr>
<tr><td>Open any course, select List from the Utilities menu, click the user's name, and then select either Product or Asset Exceptions.</td><td>From the Manage tab, select Users, open any user profile, and then select Exceptions.</td><td>Select Users > Accounts, open any user to access the profile page, and then then select Exceptions from the Sections menu.</td></tr>
<tr><td>
</td><td>
</td><td>
</td></tr>
<tr><td>
</td><td colspan="2">
</td></tr>
</table>

21.5.1 Extend a User's Access Date

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

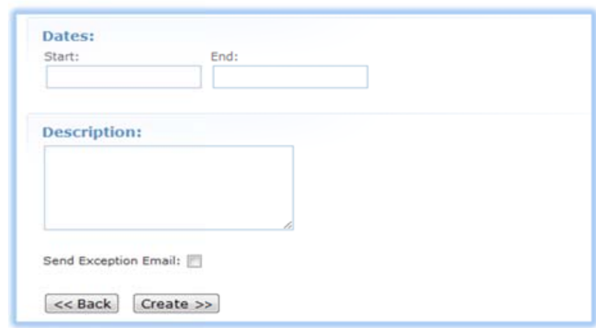
For Products

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

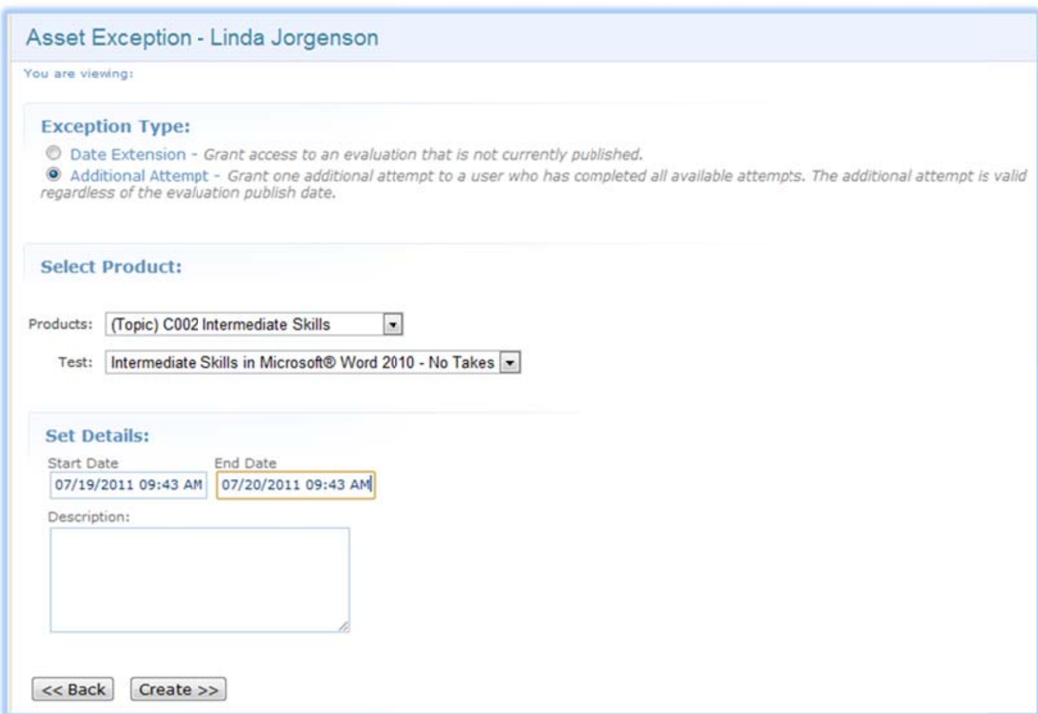
1. Select **Create** under **Asset Exception**
   Publishers and Instructors must select **Asset Exceptions** first.
2. Select **Date Extension** under the exception type
3. Select the relevant **Product** and **Asset**
4. Set the new **Start** and **End** dates
5. Add an optional description for the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



21.5.2 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

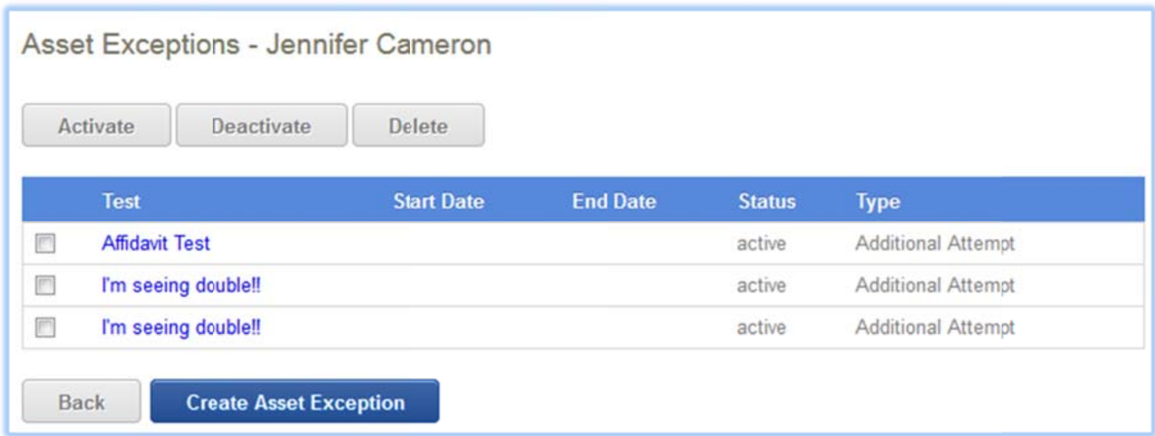


21.5.3 Activate, Deactivate or Delete Exceptions

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.

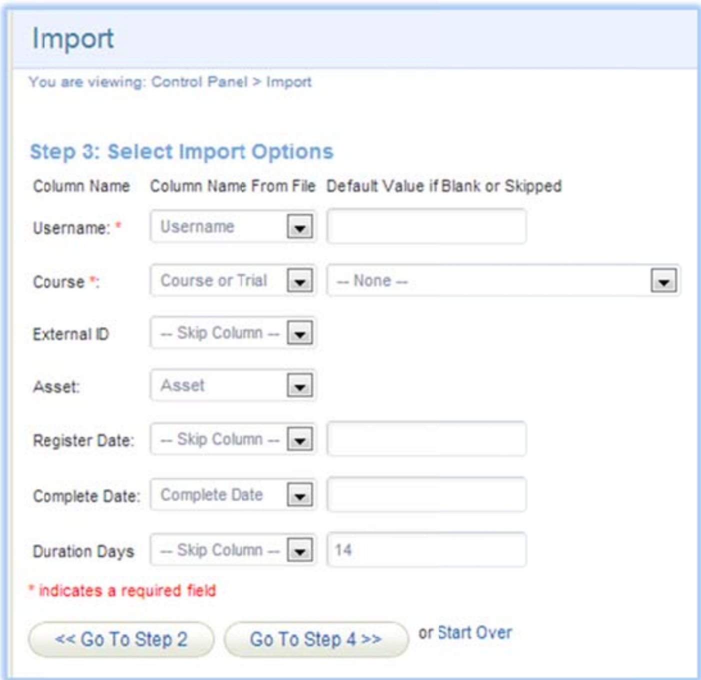
Site manager, campus admin, and campus manager view:

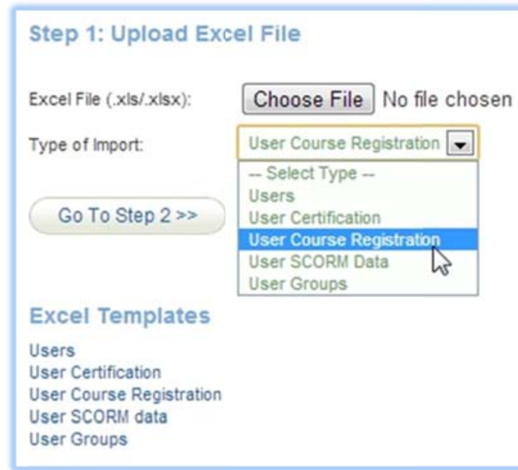
Publisher and instructor view:



21.5.4 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.





Import Options May Vary

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

21.6 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.

21.7 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.

21.7.1 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.

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

You can copy or create a new asset to the same product as the original. 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 already enrolled to the product will have access to the new asset, you may need to inform them that it is available.
- 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.

Updating SCORM

There are several considerations to make when updating SCORM. See the Courseware and SCORM chapter for more details.

22. Media Library

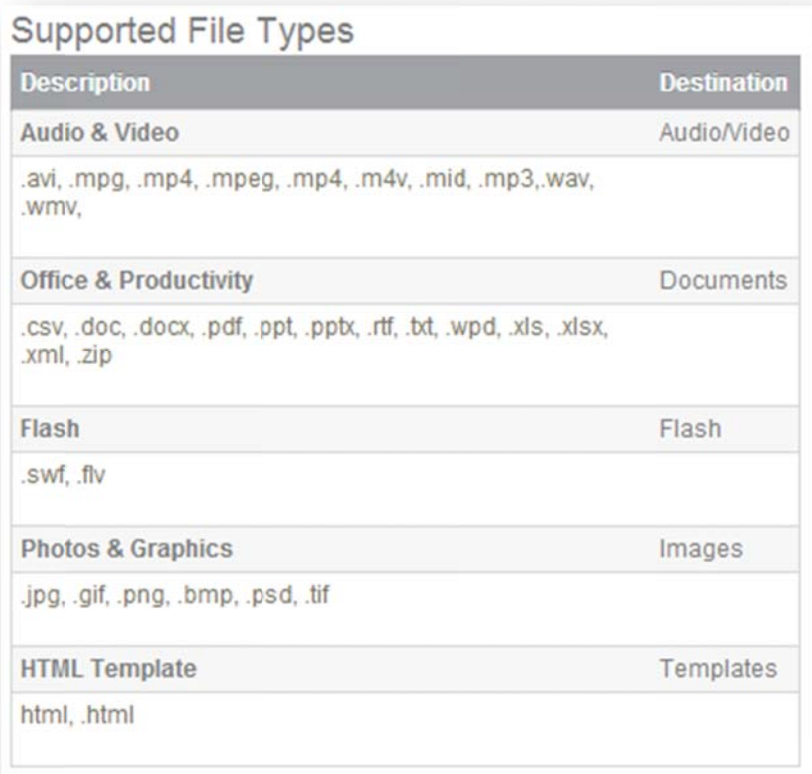
Informetica gives you online access to course materials stored in a repository that holds all of your documents, images, multimedia files, and more.

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.

22.1 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
.ICS		calendar & scheduling application 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

22.1.1 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:

22.1.2 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.

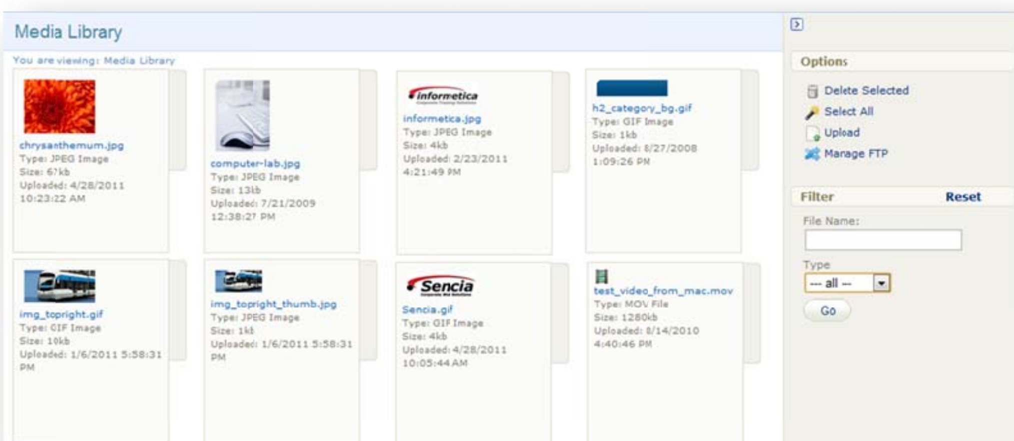
File type: Using the supported video file formats will help ensure that your videos play successfully on the web.

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.

22.2 Global Media Library

This feature is available 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.

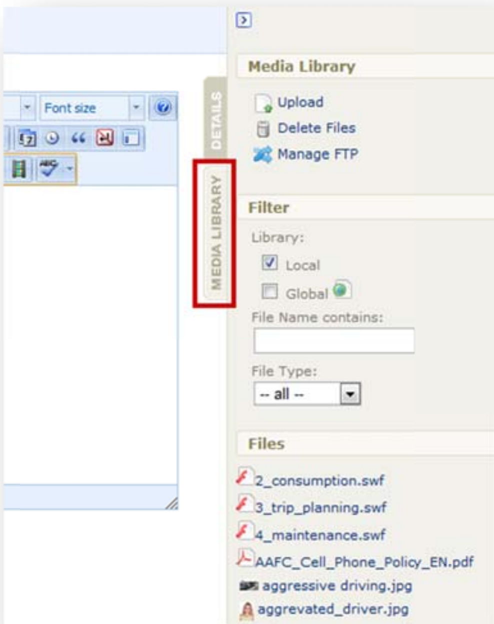
Options: Select, deselect, upload, and delete files. Manage FTP files if configured.

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

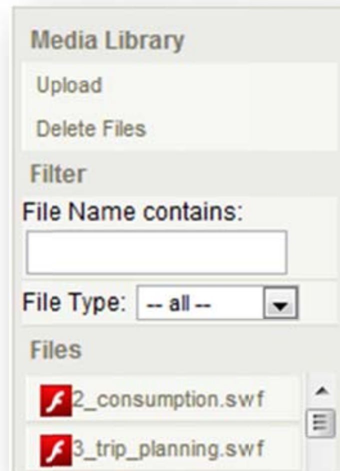
22.3 Local Media Library

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).

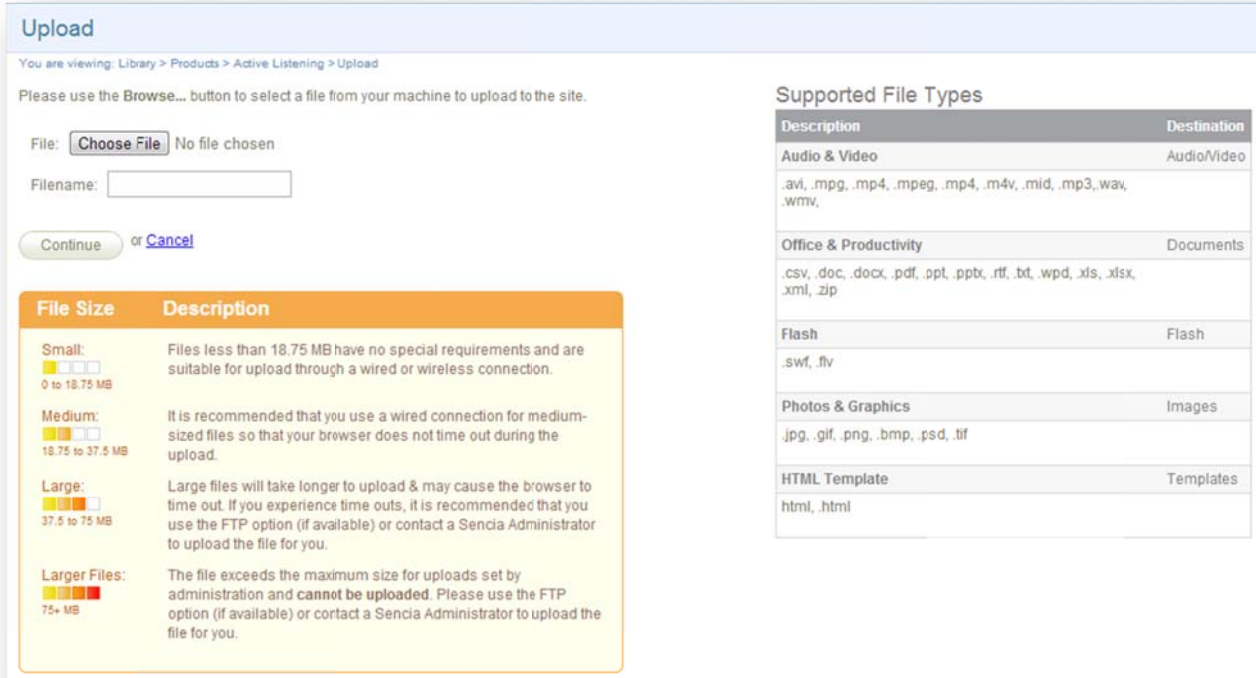
Filter: Allows you to filter for specific files by library location and name or type. You can also reset the filter.

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

22.4 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.


Media Library
Upload
Delete Files
Filter
File Name contains:
File Type:
-- all --


Upload
You are viewing: Library > Products > Active Listening > Upload
Please use the Browse... button to select a file from your machine to upload to the site.
File: Choose File No file chosen
Filename:
Continue or Cancel
File Size Description
Small:
0 to 18.75 MB
Files less than 18.75 MB have no special requirements and are suitable for upload through a wired or wireless connection.
Medium:
18.75 to 37.5 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:
37.5 to 75 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:
75+ 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.
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

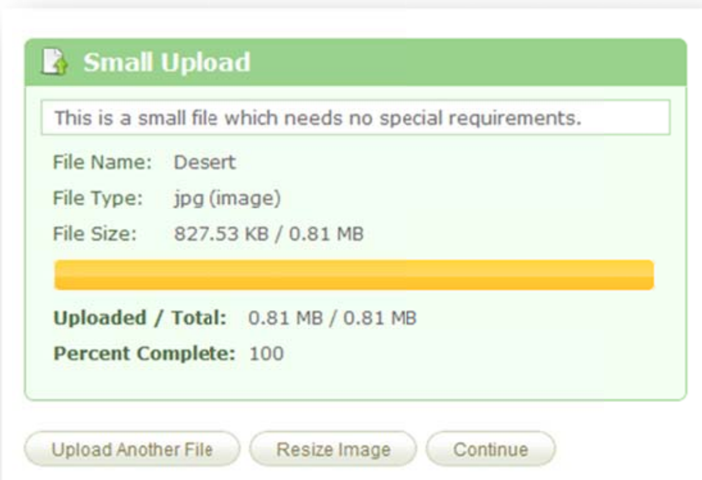
Choose File/Browse: Depending in the browser you are using the option showing here may be Browse or Choose File. Select the file you wish to upload from your computer.

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.

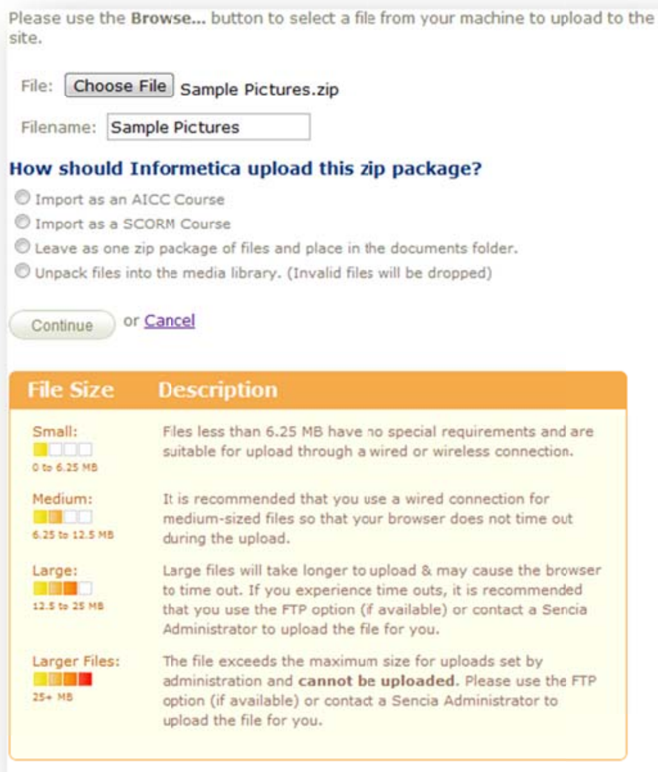
File Types: The table on the right hand size shows a complete list of file types that are supported (the example above is truncated and does not show the entire list).

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.



22.5 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.

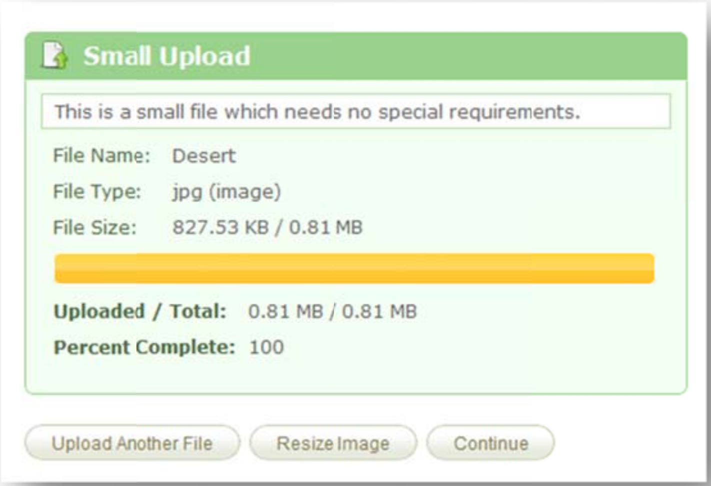
Select **Leave as one zip package of files and place in the documents folder** to create a download link to the file from the product.

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.



22.6 Upload Large Files via FTP

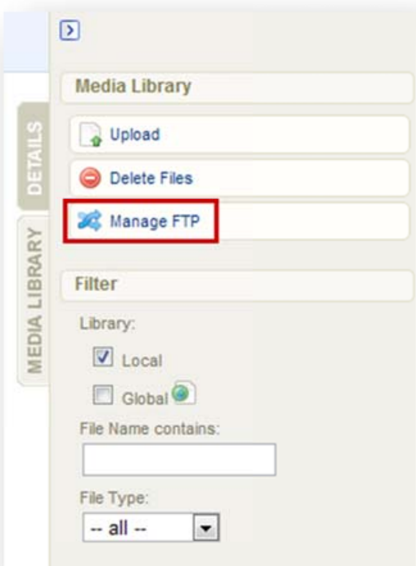
This feature is available to Site Managers.

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.

22.6.1 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.

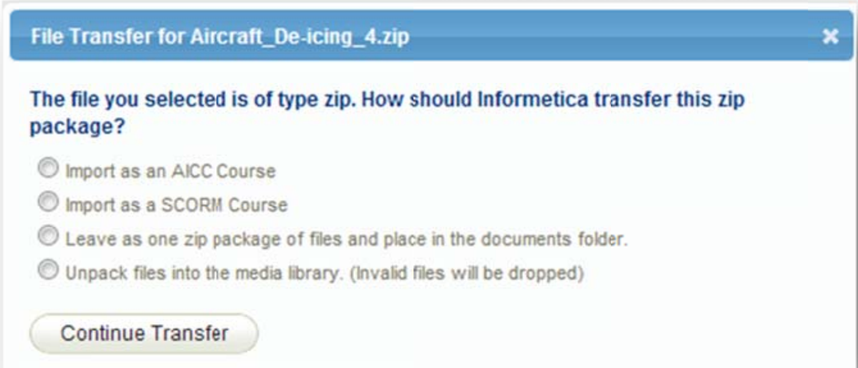
22.6.2 Manage FTP



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.



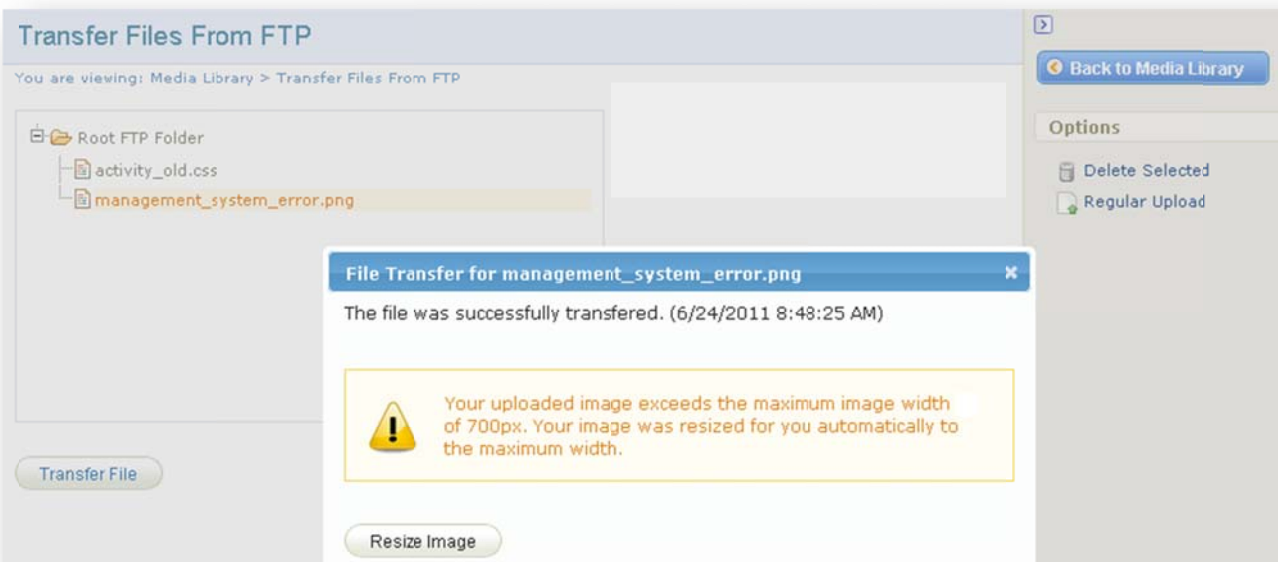
Select **Import as an AICC Course** if you are uploading premade courseware that is AICC compliant.

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

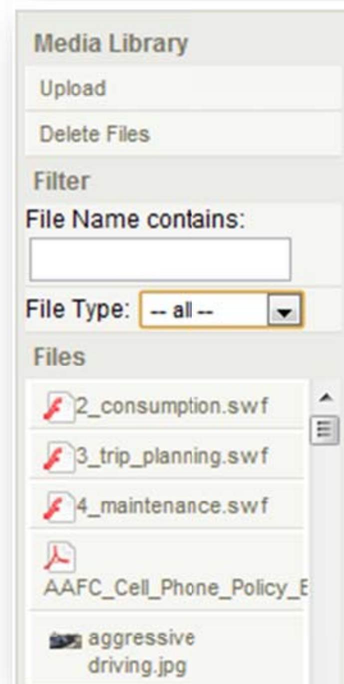
Select **Leave as one zip package of files and place in the documents folder** to create a download link to the file from the product.

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.



22.7 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.

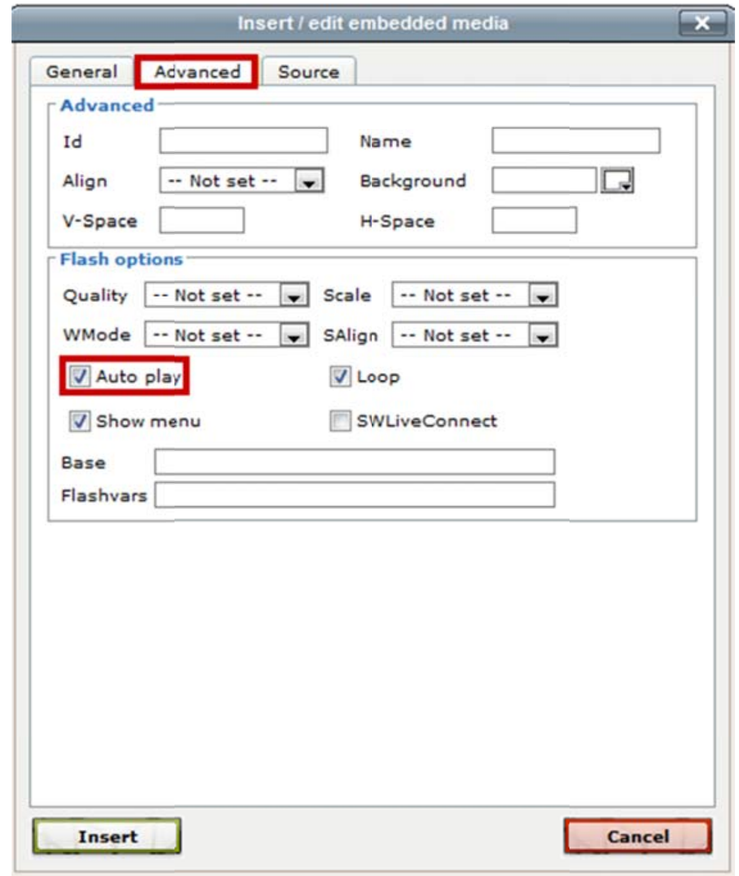
Click the save button in the publishing window. The file will be placed on the page where you set your cursor. Click the Save button in the Publishing Window to update the change to the page. Inserting an image will put the image into your Publishing Window while inserting PDF, Word, PPT or Excel files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

22.7.1 Embedded multimedia files

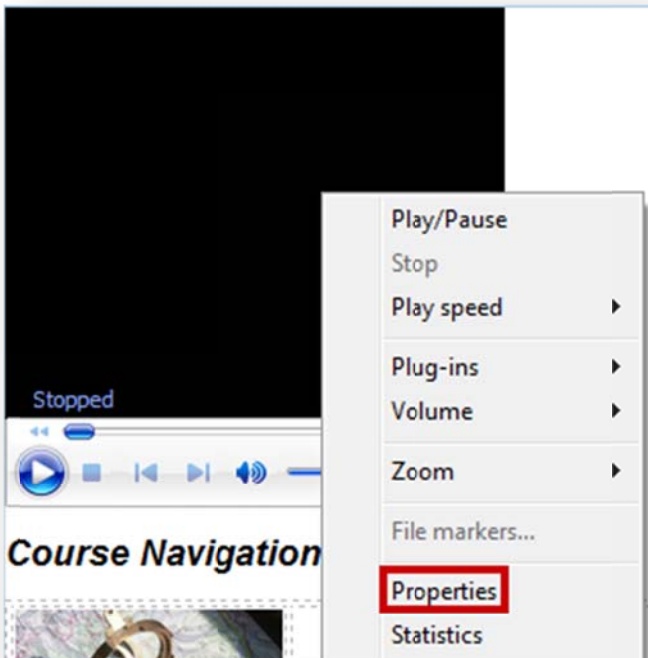
When you insert an audio or video file, it is inserted by default in an embedded format that is set to automatically play when the user visits the page. This means that it is be placed as a clip directly on the page and will play the video or audio automatically as appropriate unless you change the default. 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.

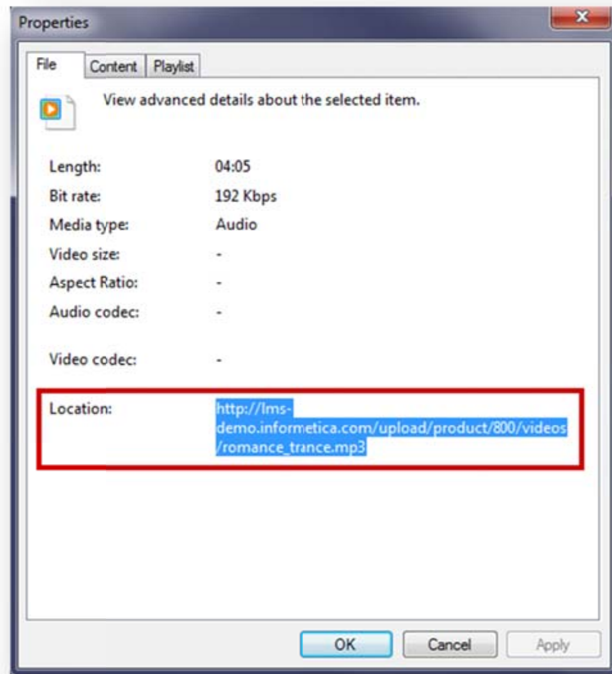


22.7.2 Creating a link to a multimedia file

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:

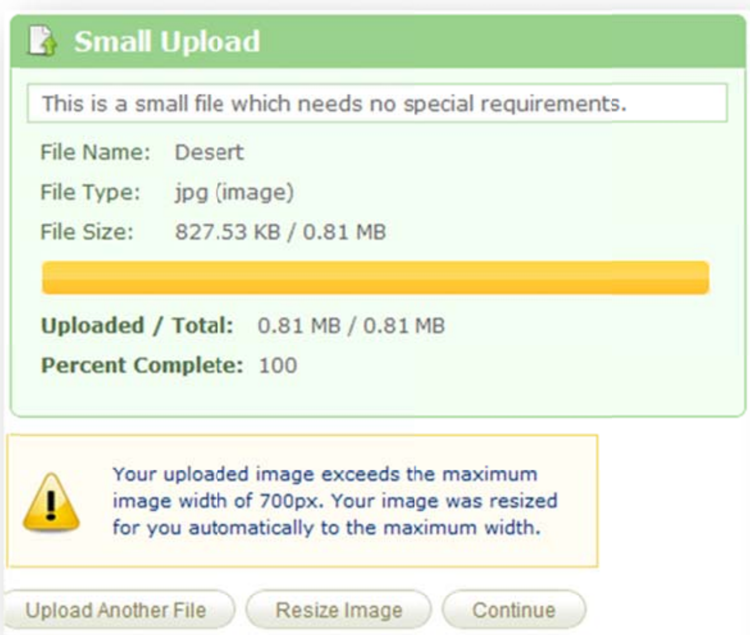
1. Insert the video or audio file on another page and then create a link to that page.
2. Insert the audio or video file as normal and then right click the inserted file. A bowser menu will appear. Select properties from this menu and copy the link. You can now paste this link onto your page as is or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

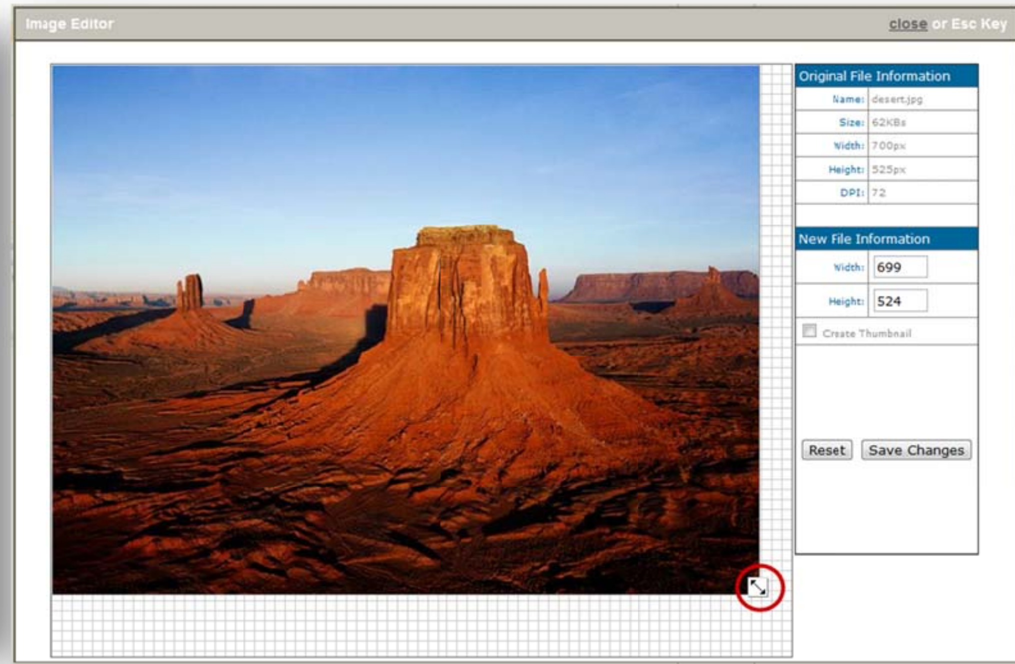




22.8 Resize Images

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.



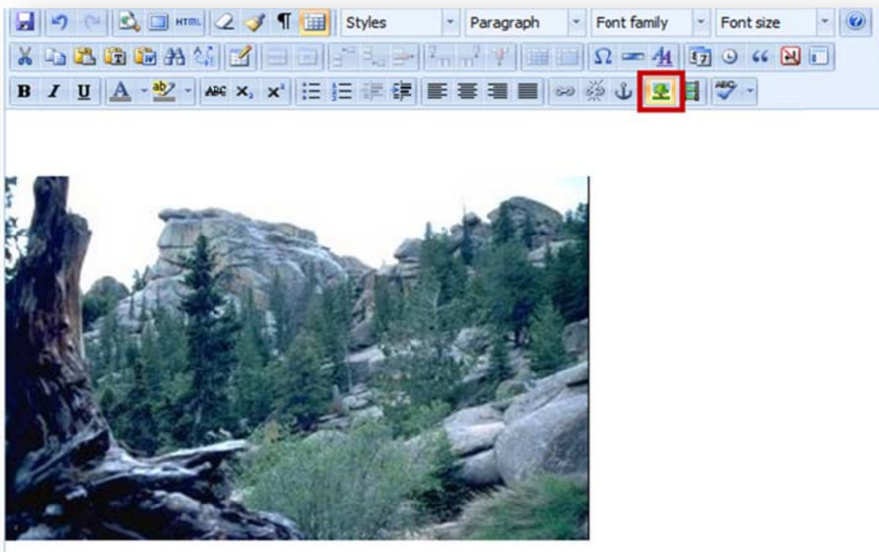


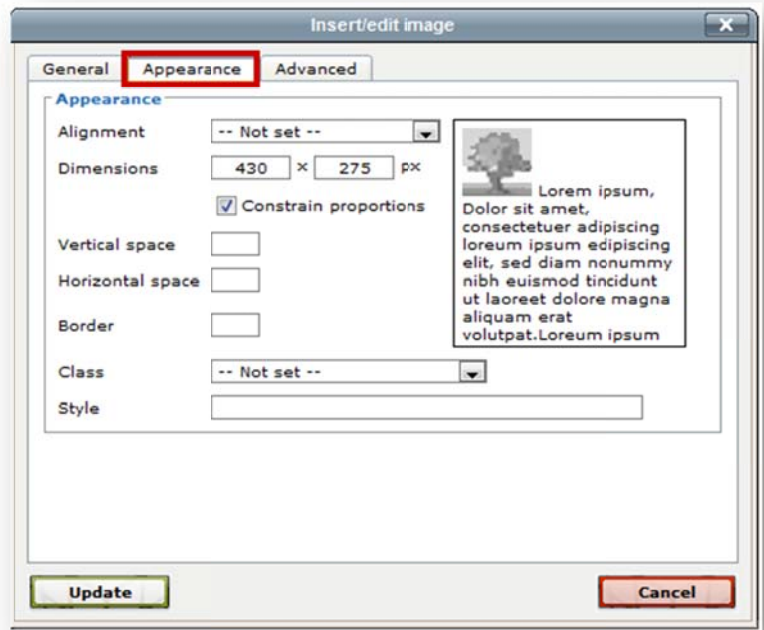
Enter the new image dimensions in the Width and Height fields in the New File Information table or click and drag the resize handle  located on the bottom right of the image to the desired size. You can use the check box in front of Create Thumbnail to have the image Resizer create a thumbnail of the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

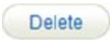
Alternatively, you can use the publishing tools within the product to change the size of an image. Navigate to the page you wish to edit an image on and then click the inserted image to select it. Click the image icon in the publishing tools at the top of the publishing window to open a new modal window.

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.

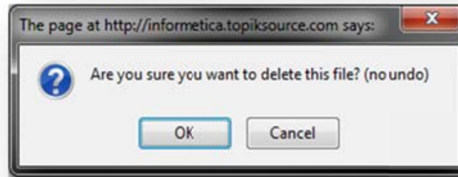




22.9 Delete Media Files from the Library

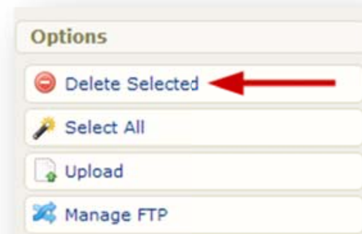
Open the product in which the file(s) you would like to remove are located. Click **Delete Files** in the media library menu. Select the type of file from the **Select Section** drop down menu to sort the files by type. Put a check in front of any of the files you wish to delete and then press the **Delete** 

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



22.9.1 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.

22.10 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.

23. SCORM Courseware

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.

Test Your SCORM

Make sure you test every SCORM course thoroughly as a participant to ensure that it performs as you expect within Informetica.

Topics Covered In This Chapter

23.1 What is SCORM?

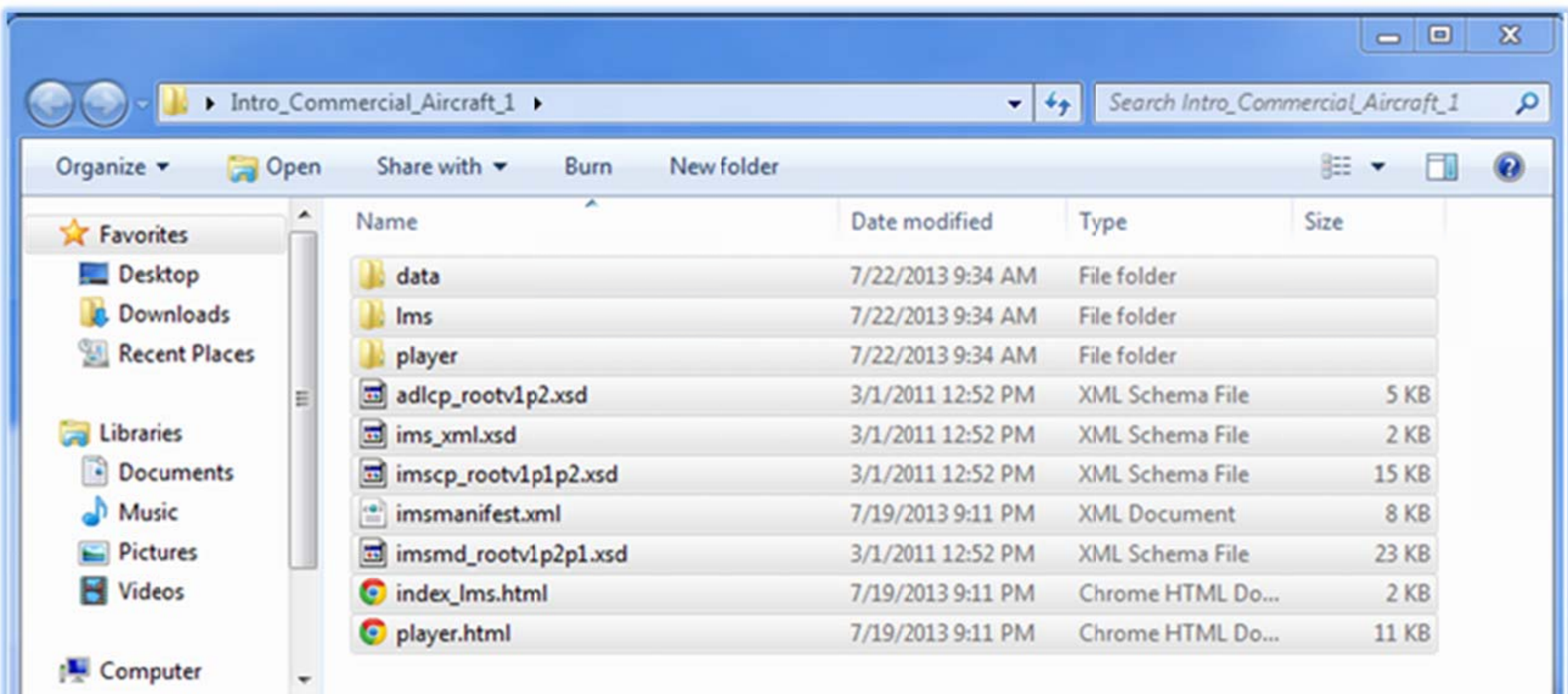
The intent of SCORM files is to create online training material that can be shared across systems. SCORM, the Sharable Content Object Reference Model, integrates a set of related technical standards, specifications, and guidelines designed to meet the functional requirements of accessibility, interoperability,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

23.2 SCORM Content Specifications

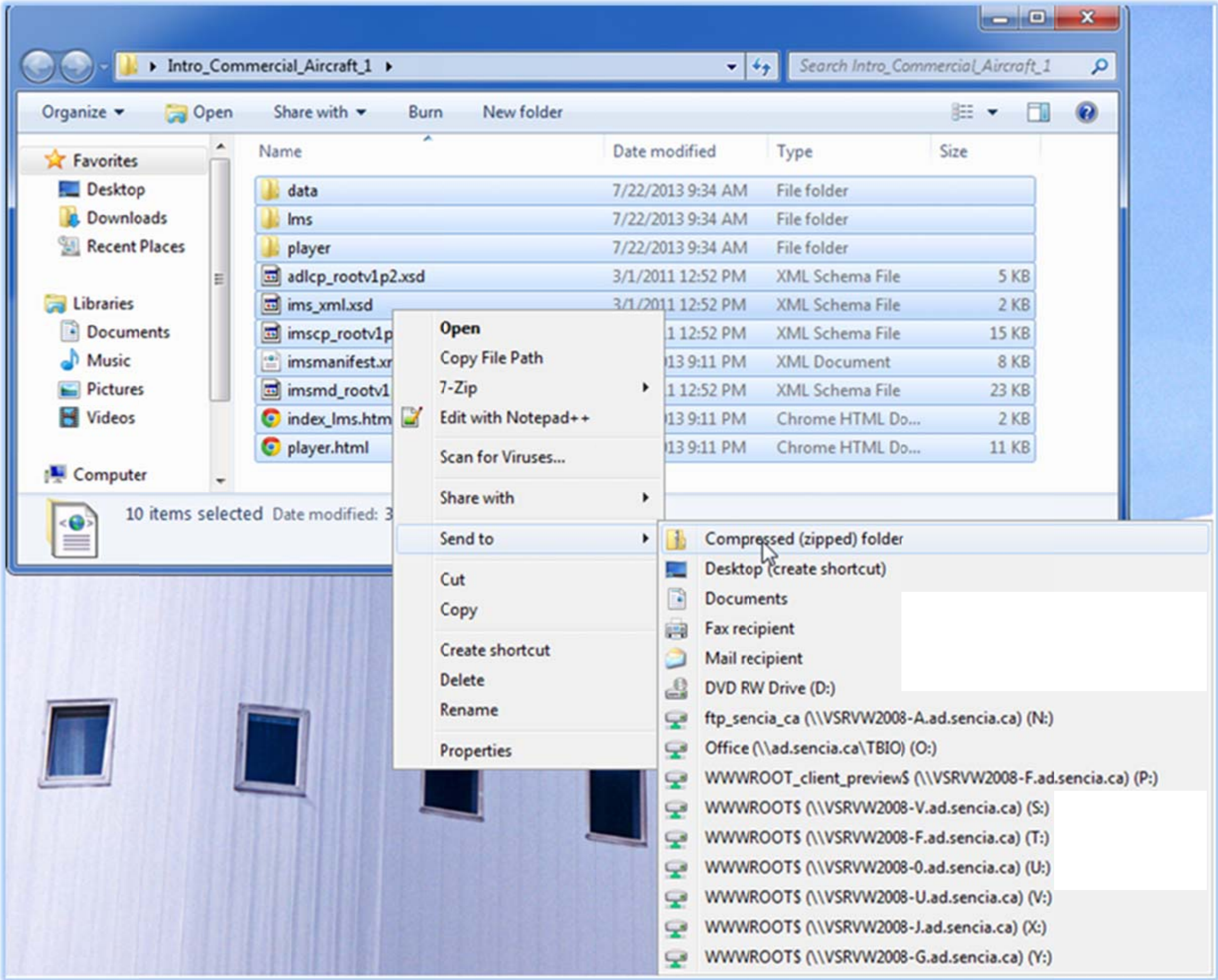
SCORM objects can include functionality to announce user interaction data to the LMS, such as responses to test questions and completion. SCORM designed in this way will allow Informetica to record that information so can be pulled into a preset report. While SCORM can push this sort of information out 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.

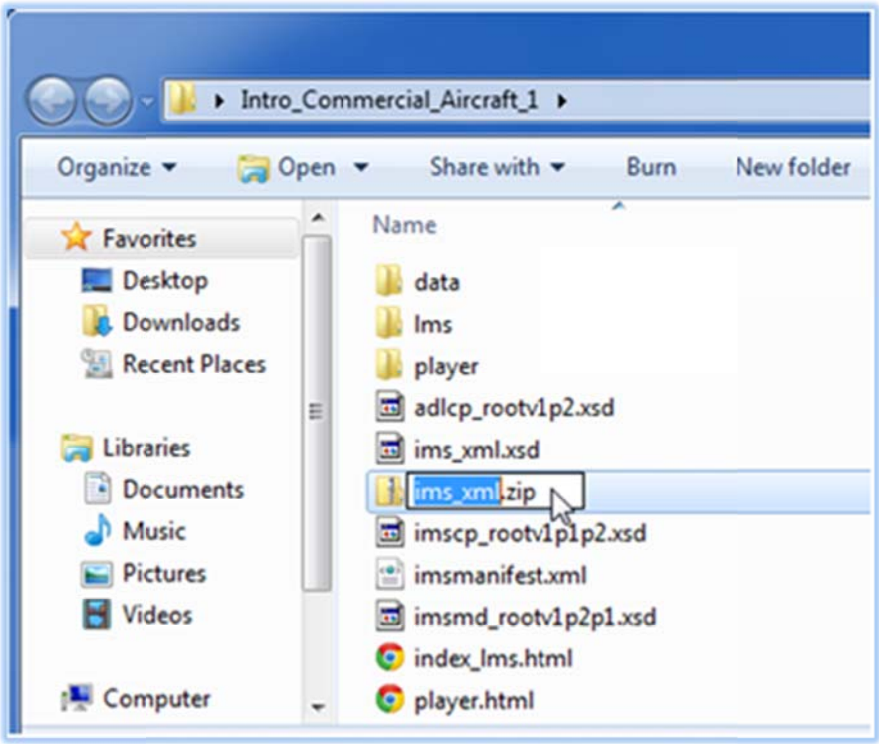
1. Open the folder containing your SCORM course content and then select all of the separate folders and files. Do not click on the top level folder with all the course content in it.



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”.



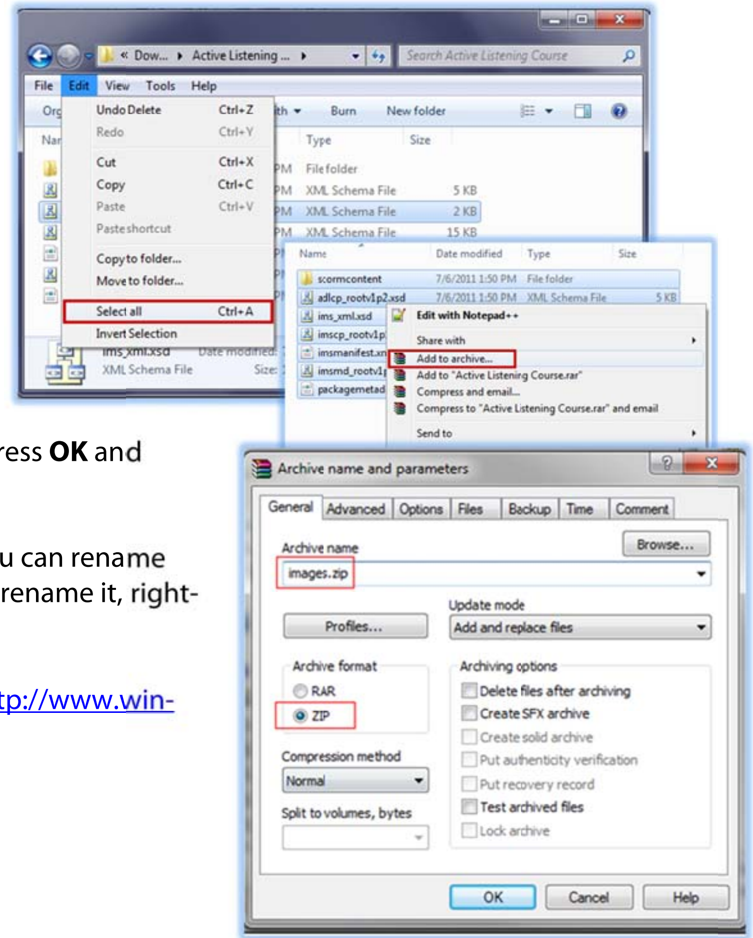
4. Copy the zip file where you desire for use.

23.3 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

23.3.1 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…**

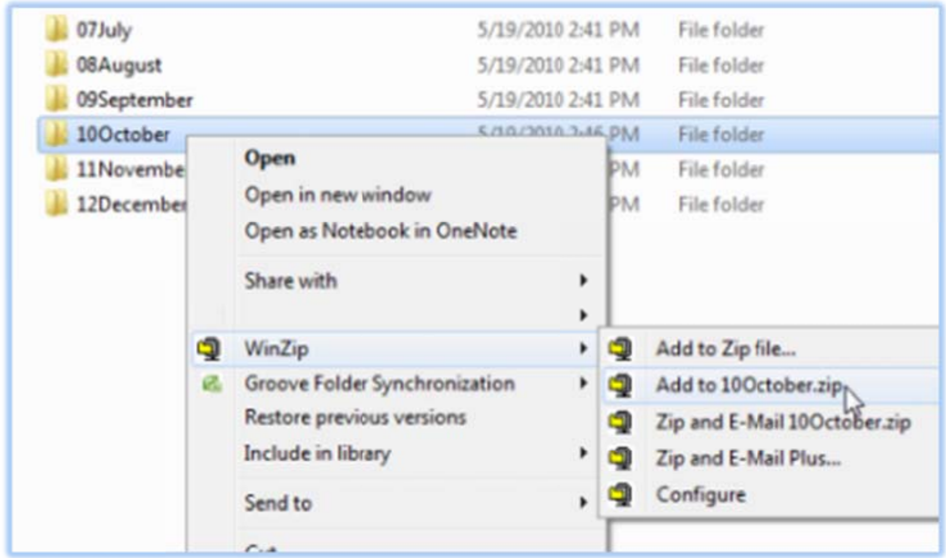
3. When the WinRAR window appears, make sure you **select the ZIP archive format**. Press **OK** and a .zip file will be created in the same directory.

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

23.3.2 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/

23.3.3 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

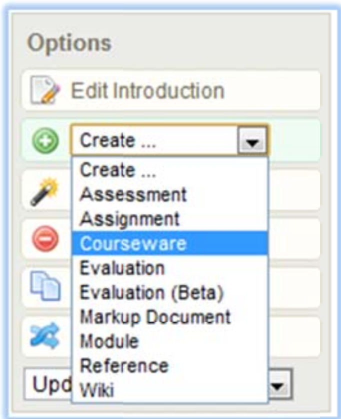
23.4 Create and Edit Courseware

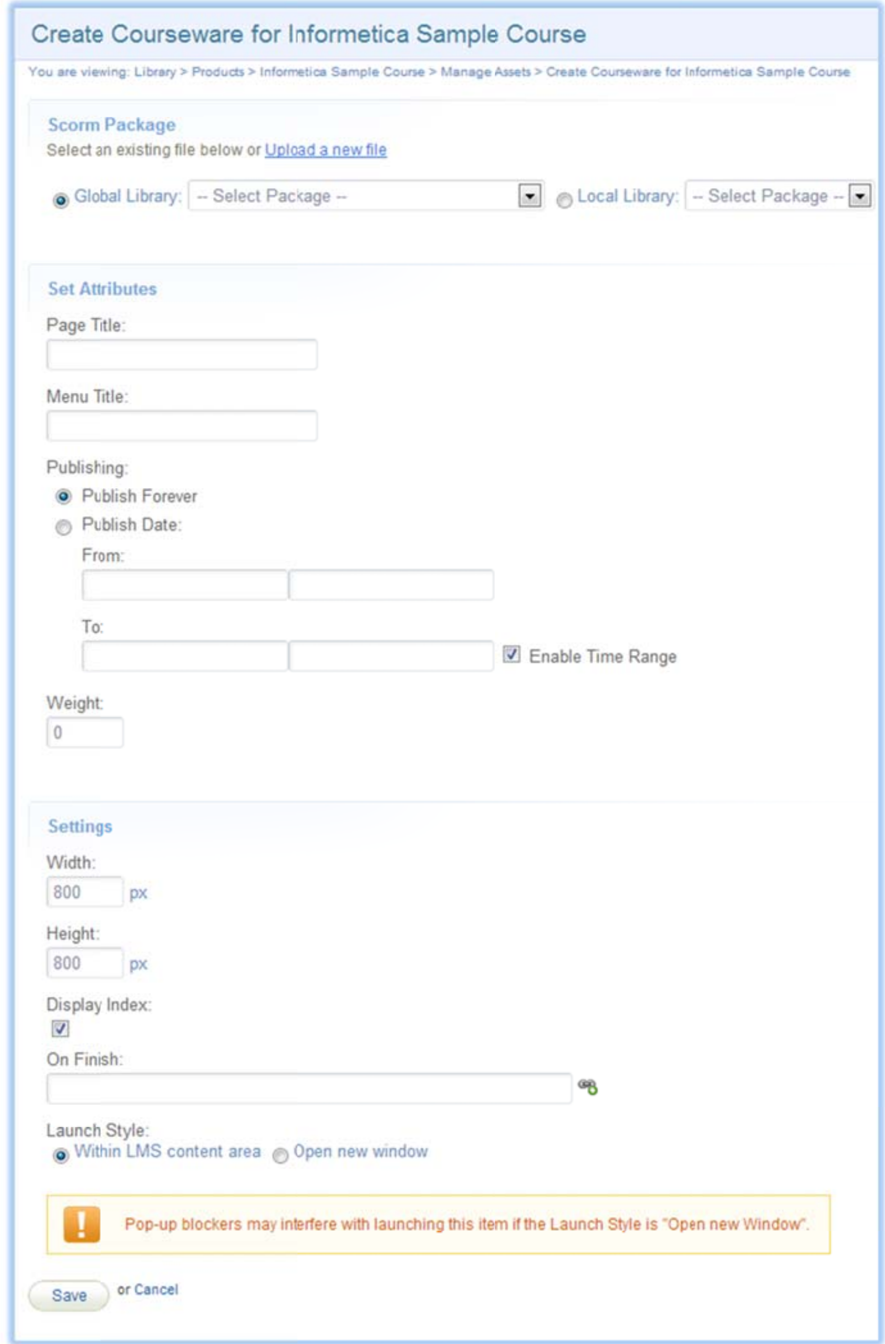
To fully create a SCORM asset you will need to complete the following steps:

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

23.4.1 Create

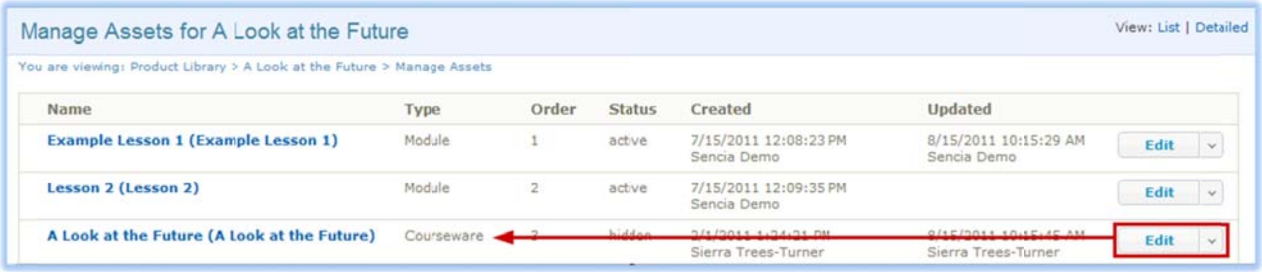
1. Navigate to the manage assets page.
2. Click **Create** under the options menu on the right
3. Select **Courseware** from the dropdown menu.
4. Fill out the form.
5. Click the **Save** button.





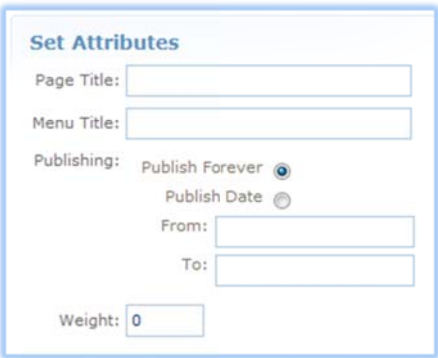
23.4.2 Edit

1. Navigate to the manage assets page.
2. Click the **Edit** button next to the courseware asset or open it by clicking on the name.
3. Make changes on the edit courseware page.
4. Click the **Save** button.



23.4.3 Courseware Attributes and Settings

Courseware Settings only need to be changed if your SCORM is not designed to launch itself automatically into a new browser window. If you wish for the courseware to run within the frame of the Informetica system itself, then you may want to change some settings.



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	Enable to display the different SCO files within SCORM asset from the menu. Desktop users can expand using the + to show the SCOs and navigate directly to a specifc one. When diabled, the + sign is not available and launching the SCORM from the menu will open the first SCO file in the package.	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

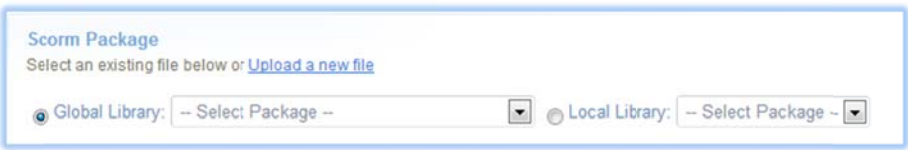
23.4.4 Edit Existing Courseware Assets

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.

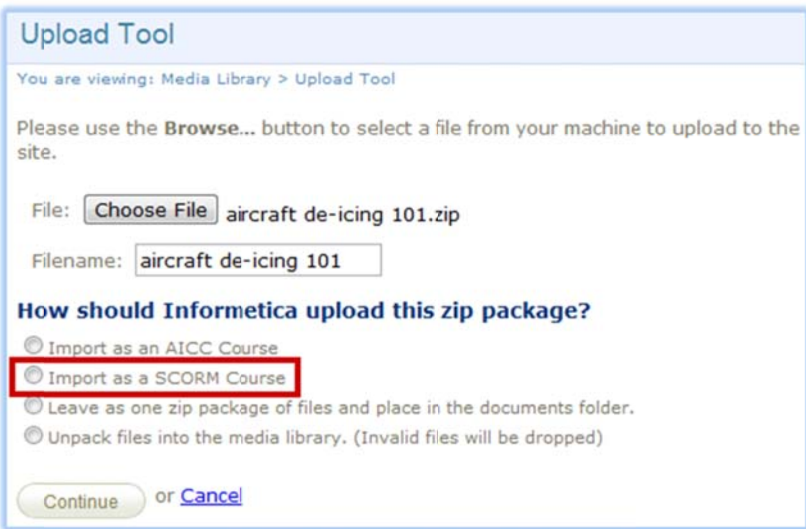
23.4.5 Upload a SCORM File

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.

Select an existing SCORM package



Upload a new SCORM package



23.5 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.

23.6 Updating SCORM Files

There are several ways to update a SCORM asset:
Option 1 Redirect: Upload a new SCORM file and redirect the asset to the new file.

Option 2 New Asset: Deactivate the existing SCORM asset and create a new asset for the revised SCORM file within the same product or a different product.

Option 3 Overwrite: The file must have the exact same file name as the file you wish to overwrite. Upload the file to same media library as the original. You will see the option to overwrite the file after you select Continue.

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. We recommend that you do a thorough test on Preview to see how it affects your users. Overwrites can affect users in the following ways:

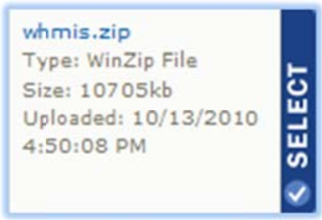
- Users who have already taken the original or who are currently in progress may see the original content.
- Book marking features may direct users to an old file that no longer exists.
- Overwrites completely replace the old file; there is no copy of the original saved in the LMS.
- You cannot compare versions in reporting, grades, tracking, and certification.
- Users who completed the original cannot reattempt if the SCORM programming limits user attempts.
- Only the most recent scores for this asset are available in the LMS.
- Some users may already have scores recorded for the old version, creating a conflict.
- Associated grades and certifications already earned will remain without taking the revision.

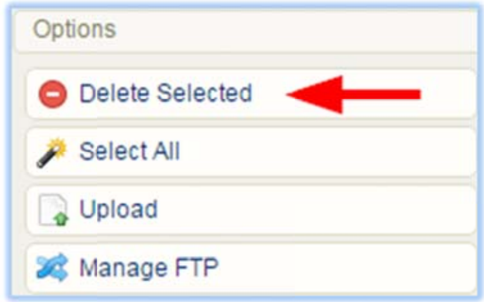
Considerations and User Impact vs Revision Options	1	2	3
Users in progress will see revisions during next launch	Maybe	No	Maybe
This option is best when there are many users in progress	No	Yes	No
User bookmarks may be affected	Maybe	No	Maybe
Links directing to the revision will remain valid	Yes	No	Yes
User attempts may be affected by course programming (such as limited attempts)	Yes	No	Yes
Keep both SCORM versions available to users	No	Yes	No
Only newly enroled users will complete the revision	Yes	No	Yes
Require users to complete both versions	No	Yes	No
Allows for recertification of new version	No	Yes	No
Current certification invalid if old version inactive	No	Yes	No
Create new certification to support both versions	No	Yes	No
Updates to associated certifications required	Maybe	Yes	No
Grades are only available for the most recent attempt	Yes	No	Yes
Grades and certifications earned in prior version may apply without completing the revision	Yes	No	Yes
Track which version users completed or obtained certification	No	Yes	No
Retain a copy of the old version in Informetica	Yes	Yes	No
Revision significantly changes courseware (e.g. number of slides, different functionality)	No	Yes	No

23.7 Delete Uploaded Courseware Files

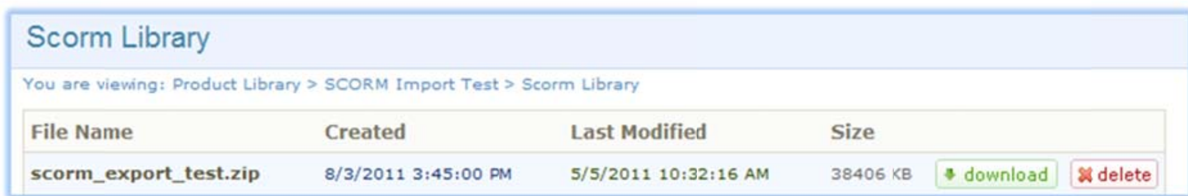
This feature is available to Site Managers.

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.





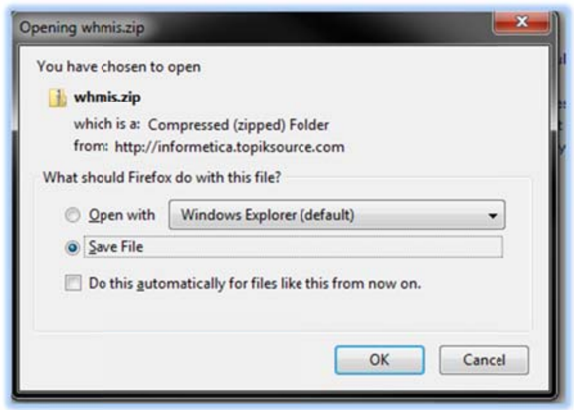
To delete from the local media library, navigate to the Product that has the SCORM file that you would like to delete, and then click on **SCORM Library** in the properties menu on the right. Click **delete** SCORM course that you would like to delete and then choose ok in the confirmation window.



23.8 Download Courseware

This feature is available 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



23.9 Export Content Created in Informetica to SCORM

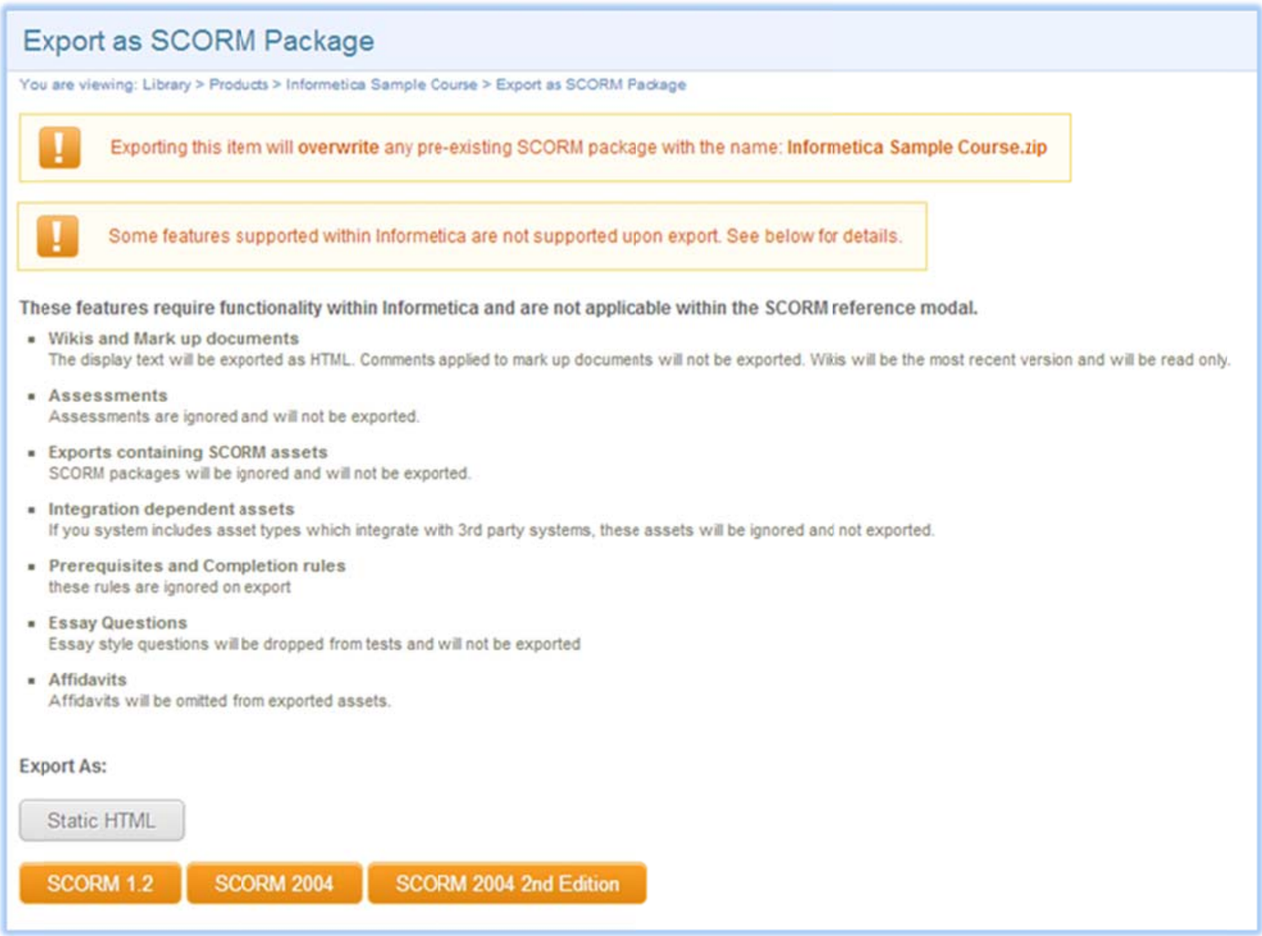
This feature is available to Site Managers.

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.



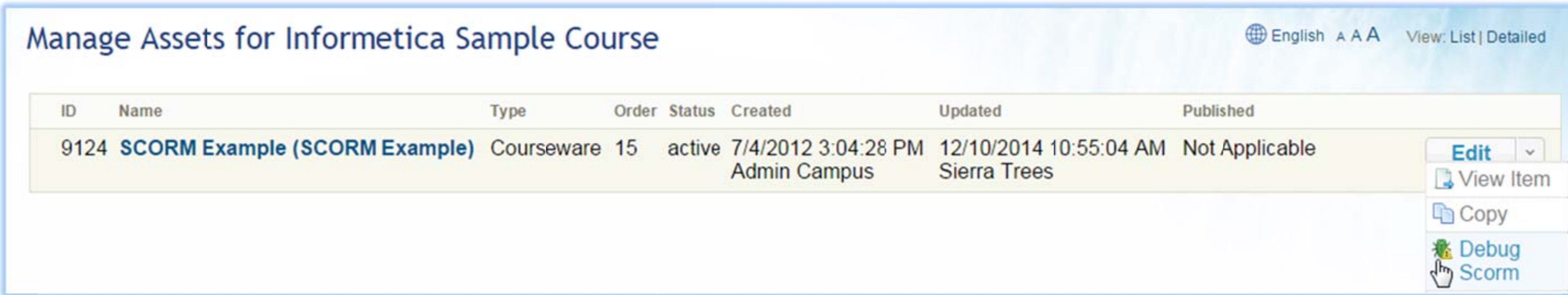
Export to SCORM Limitations

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. This tool is not currently configured to capture Prova tests built using question bank questions.

23.10 SCORM Debug Tool

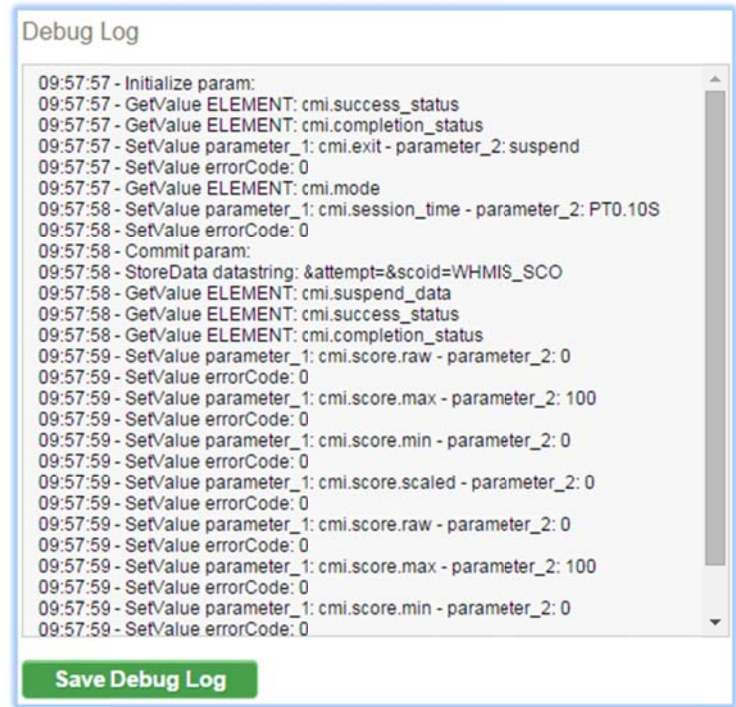
This feature is available to Campus Admins and Publishers.

The SCORM debug tool can help you provide Informetica support with more information when resolving issues that you are experiencing with your SCORM asset. To enter debug mode, go to the manage assets page and use the split button next to the SCORM asset. Select **Debug Scorm**.



The SCORM asset will launch in debug mode with an open a modal window that displays the debug log.

While you are in debug mode, ensure that you purposely replicate any issues you experienced in the SCORM asset so that they are captured by the debug tool. Run the SCORM asset until you complete it, then exit the SCORM, save the debug log, and send it to your Site Manager. The Site Manager should include this log when creating a support ticket.



24. Modules, Assignments, and References

Topics Covered In This Chapter

Module vs Assignment vs Reference

What's the Difference?

Module

Modules can be assigned a passing grade, weight, and publishing dates. Modules can also apply to certifications. Create a completion rule to define the passing criteria. Modules must be graded manually, so participants will not receive the certification until an Instructor, Publisher, Campus Admin, or Site Manager grades the module.

Assignment

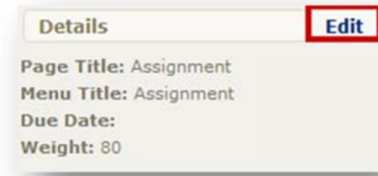
Assignments have a weight and due date attached. They are automatically removed from a user's access when they are past due. Assignments are typically used with Instructor Led Products and are used to grade an element of the product that is done off line. For example, participants are required to email 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.

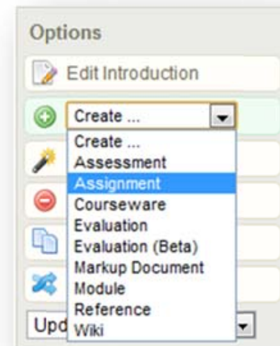
Reference

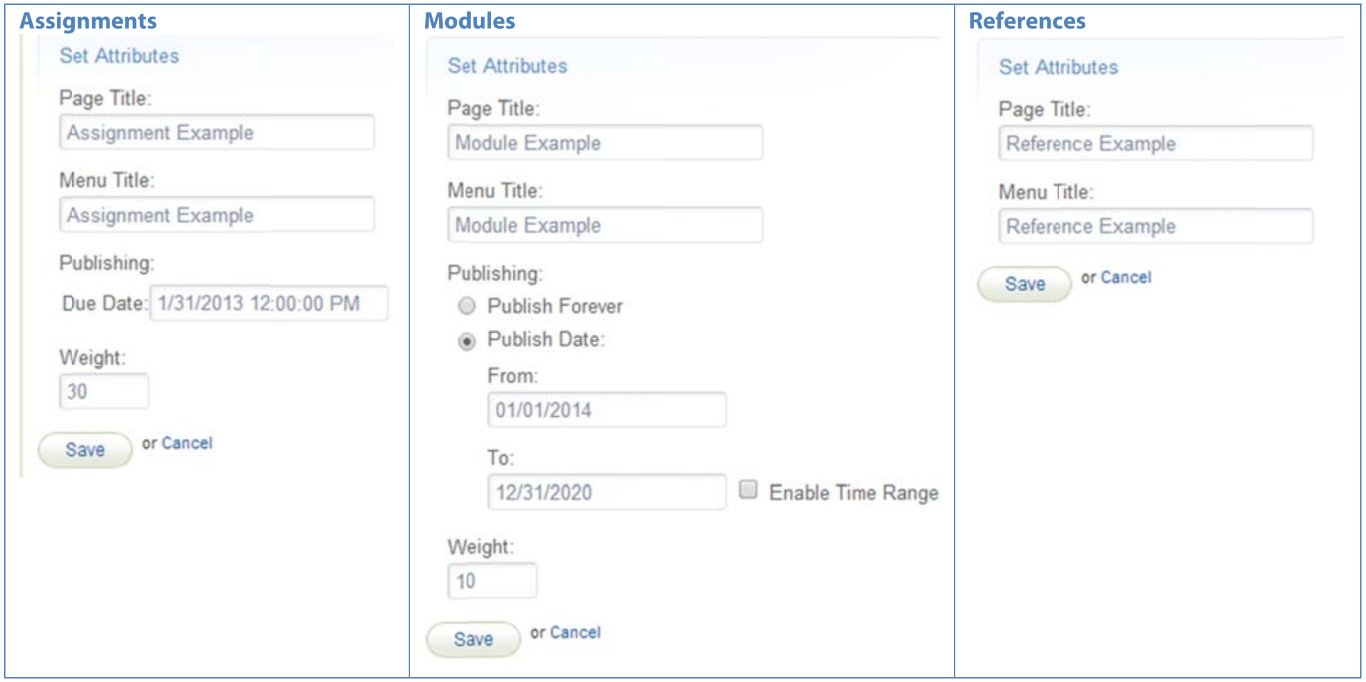
References are assets within a product that are always available. They often contain resources for the participants such as external links, a relevant glossary of terms or can be used as a landing page for the product. Reference pages can even be linked to from other pages or set up as popup windows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

24.1 Create or Edit a Module, Assignment, or Reference

From a product's manage assets page, click on "create" under the options menu on the right and select Assignment, Module, or Reference from the dropdown menu. To edit these details, click on "edit" in the details menu. Enter the details on the page, and then save.





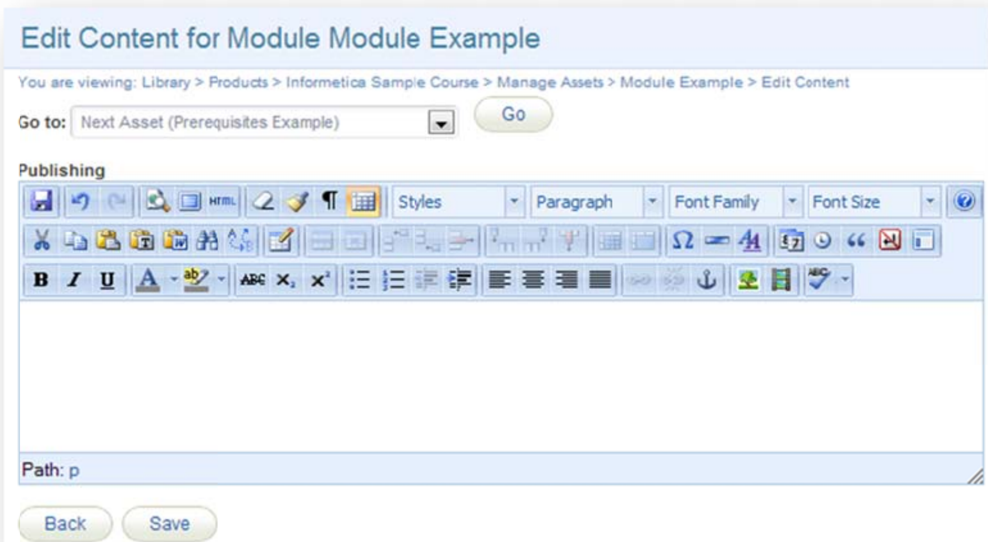


Brief description of the fields

Field	Description	Input
Page Title	The page title appears on the top of online content pages.	Required
Menu Title	The menu title appears in the assets list and in menus. Character display is limited, so strive for shorter titles.	Required
Publish Date	Assets published forever are available to enrolled participants with access. Assets published for specific dates are available to enrolled participants, however, it is not available before or after the publish dates.	Optional
Due Date	Enter a date if the participant must complete the assignment by a certain date.	Optional
Weight	A percentage that the Module or Assignment is worth towards the product's overall grade. 0 indicates no weight.	Optional

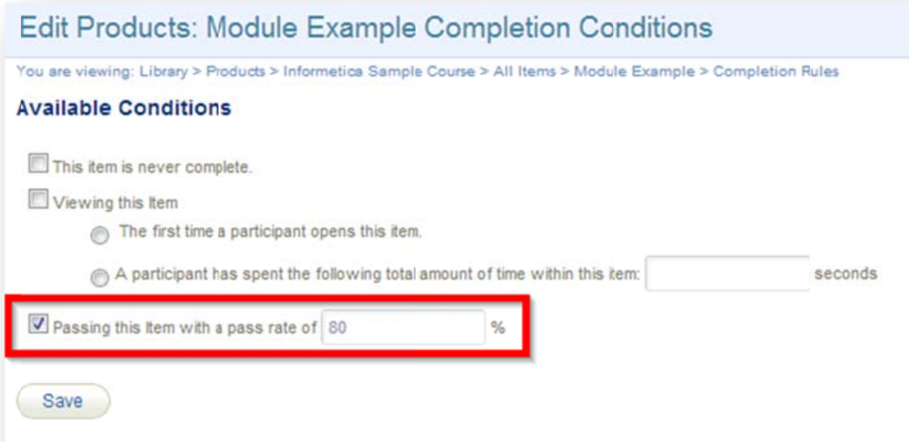
24.2 Add or Edit Content

From the manage assets page, click on the Module, Assignment, or Reference you wish to add content to or edit. You will be brought the publishing window screen where you can design the text and content for the asset. 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.



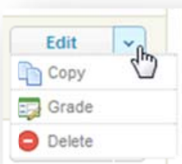
24.3 Set Module Passing Grade

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:



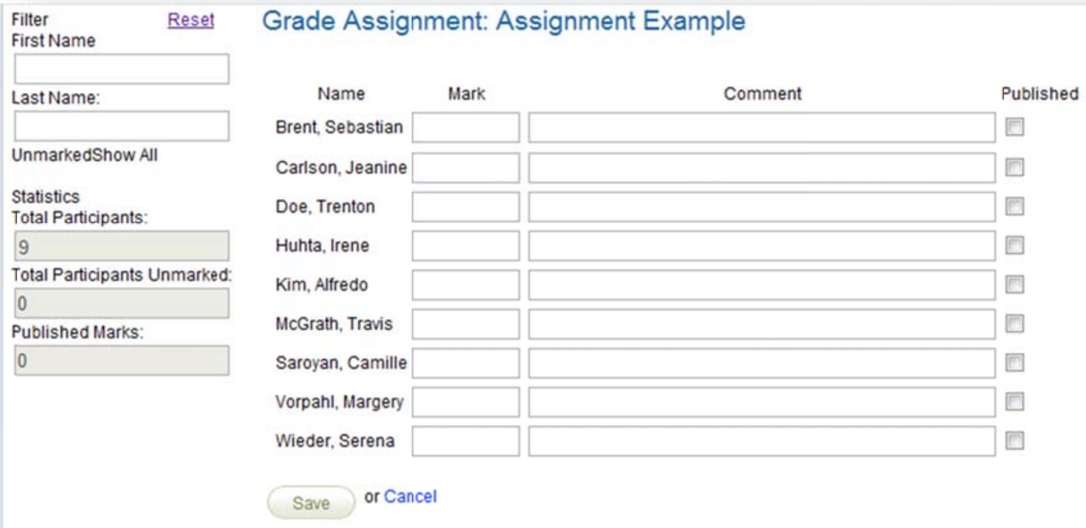
24.4 Grade an Assignment or Module

From the Manage Assets page, you can manually grade or override a grade for an assignment or module. Click on the grade button within the asset's information box to or select the down arrow next to the Edit button.

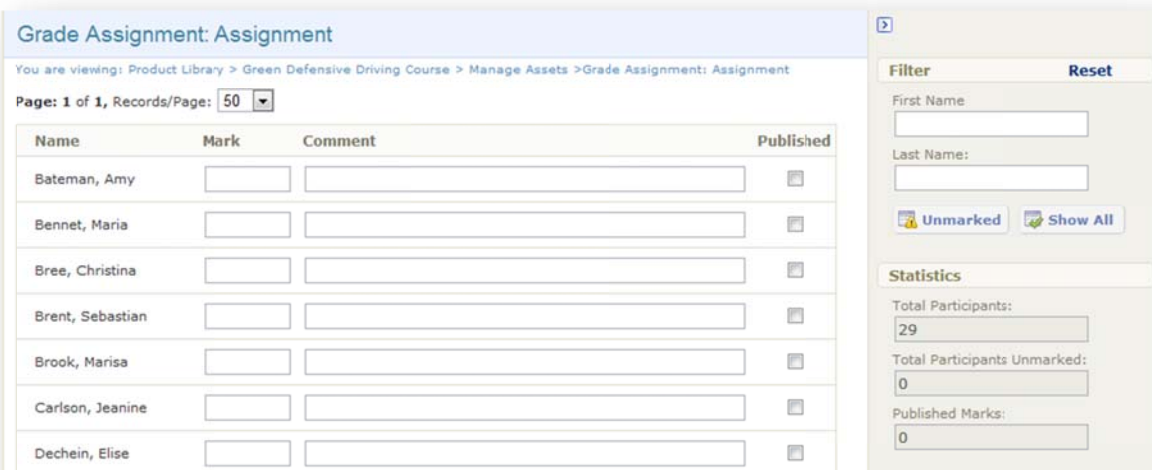


From the grade screen you can add a mark for individual participants, add comments, and publish the grade so it will be displayed on the participant's transcript. You can use the filter on the right to see only participants who have not been graded yet or to enter a specific name.

Campus Admin and Publisher View



Site Manager View



Brief description of the fields

Field	Description	Input
Mark	Enter a grade or mark next to the participant's name for the assignment or module.	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. Unpublished grades will still appear with a Pass/Fail result.	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

25. 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.

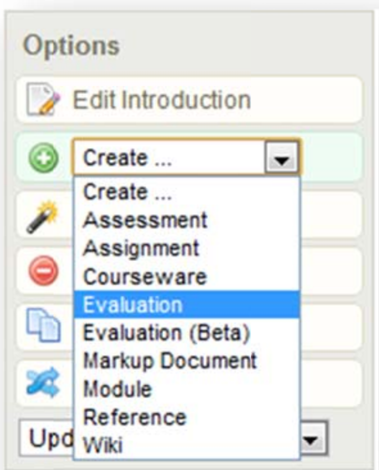
Topics Covered In This Chapter

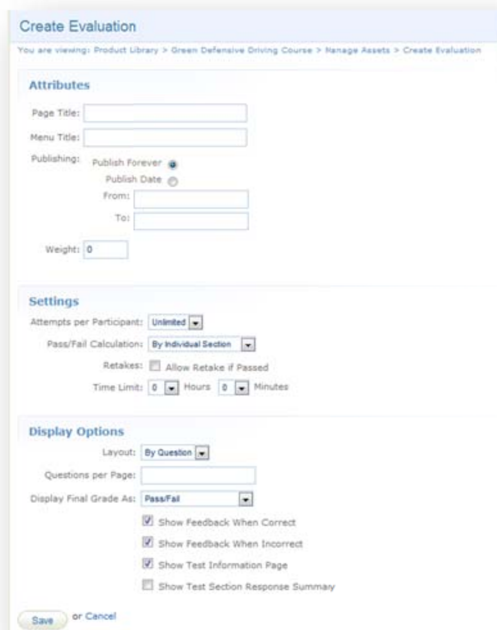
25.1 Create a New Evaluation

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.

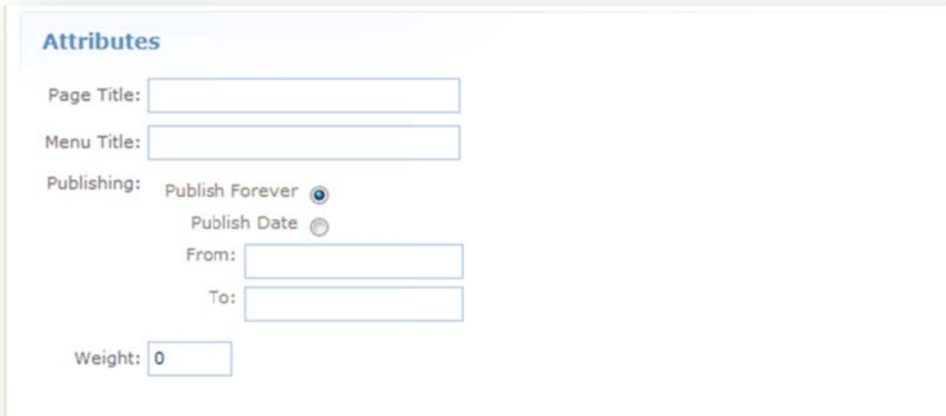




Settings are Set in Stone

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.

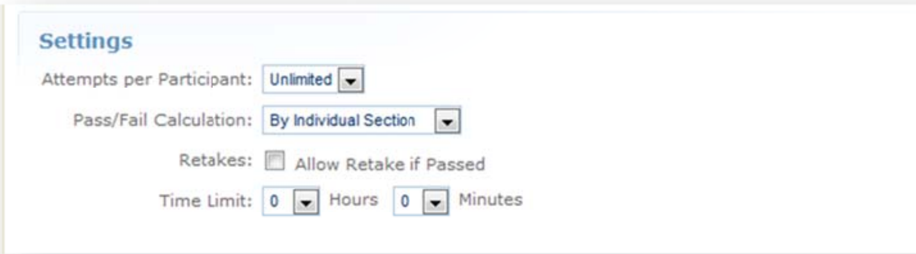
25.1.1 Evaluation Attributes



Description of the fields

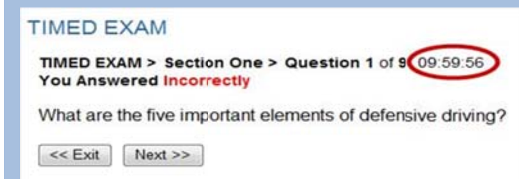
Field	Description	Input
Page Title	Enter the name of the evaluation. The page title will appear appears across the top of the page when this evaluation is open.	Required
Menu Title	Enter a name for the evaluation as it will appear in side menus, user transcripts, bread crumb trails, and reports. Menus 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

25.1.2 Evaluation Settings



Description of the fields

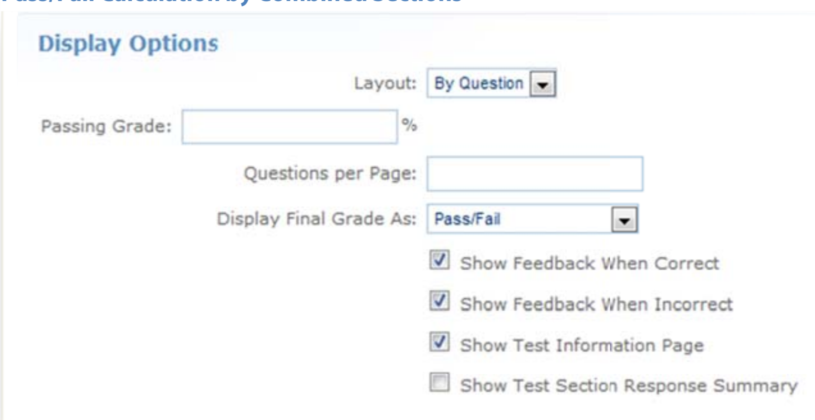
Field	Description	Input
Attempts per Participant	Select the number of times a participant is allowed to take this evaluation (1-5 attempts or unlimited).	Optional
Pass/Fail Calculation By	Use the drop down menu to select one: Combined Sections: Questions are scored and a percentage is determined against 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

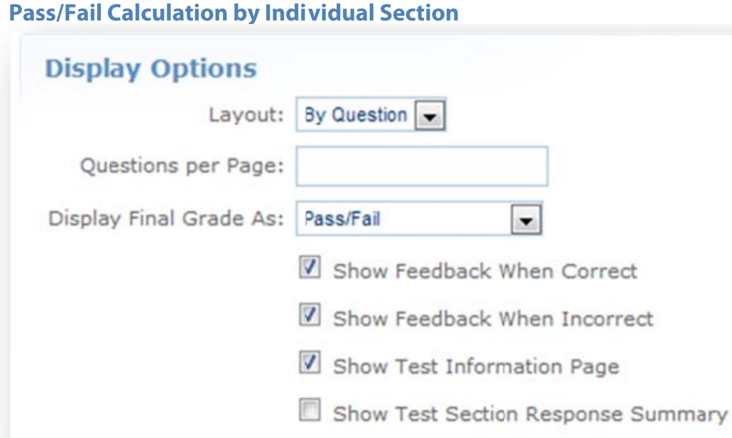
25.1.3 Display Options

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.

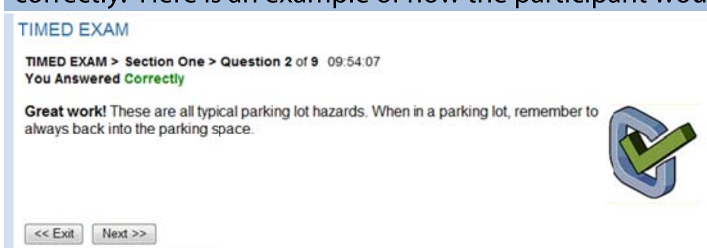
Pass/Fail Calculation by Combined Sections

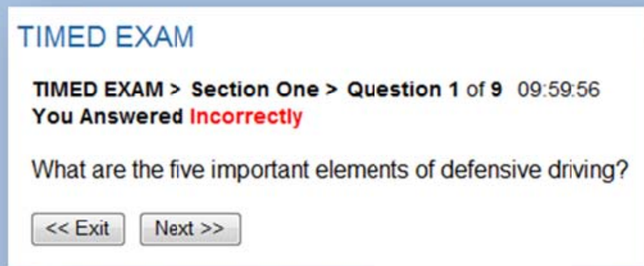
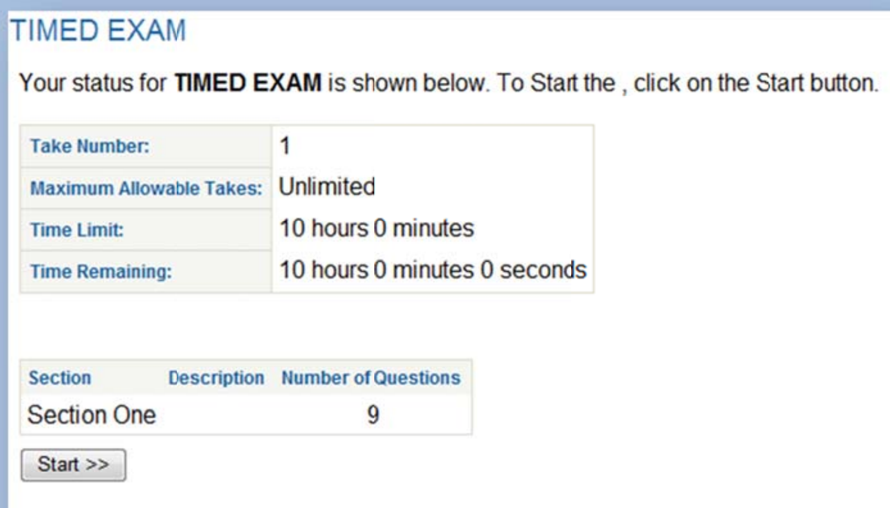


Pass/Fail Calculation by Individual Section

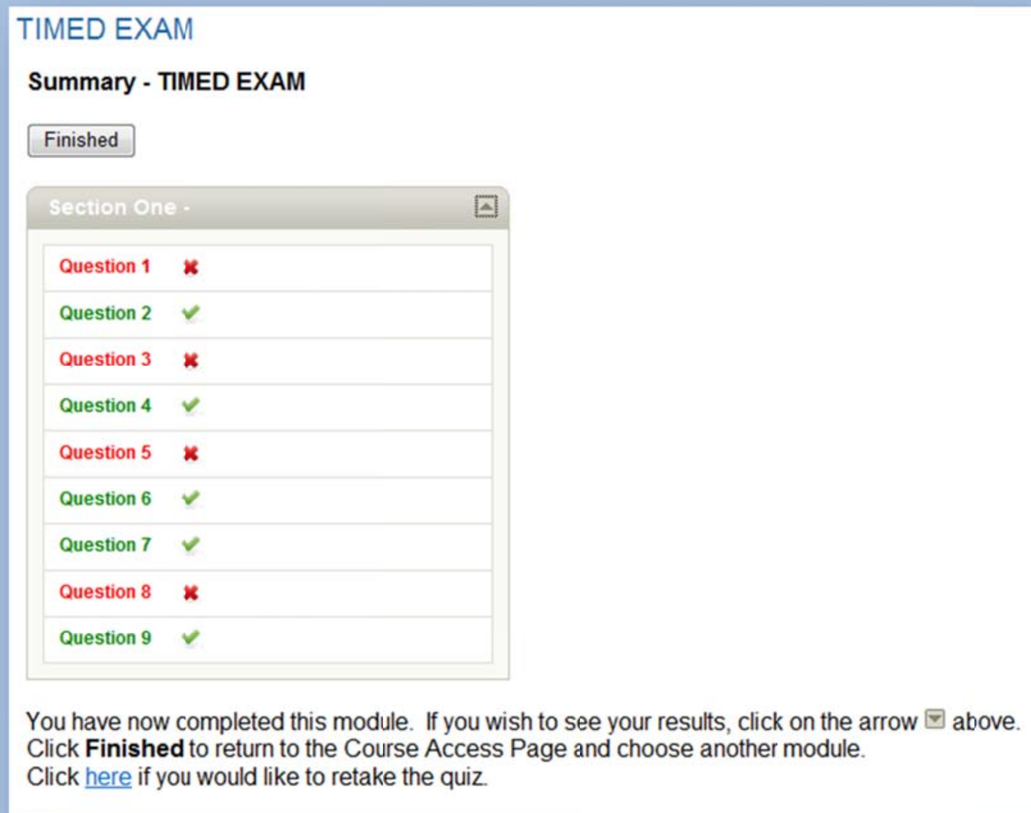


Description of the fields

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>

<table>
<tr><th>Field</th><th>Description</th><th>Input</th></tr>
<tr><td>Show Test Section Response Summary</td><td>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:



</td><td>Optional</td></tr>
<tr><td>Save</td><td>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.</td><td>Required</td></tr>
<tr><td>Cancel</td><td>This button will return you to the manage assets page without creating a new evaluation.</td><td>Optional</td></tr>
</table>

25.1.5 Create an Evaluation Section

After you have created a new evaluation, you will need to create at least one section to hold your questions.

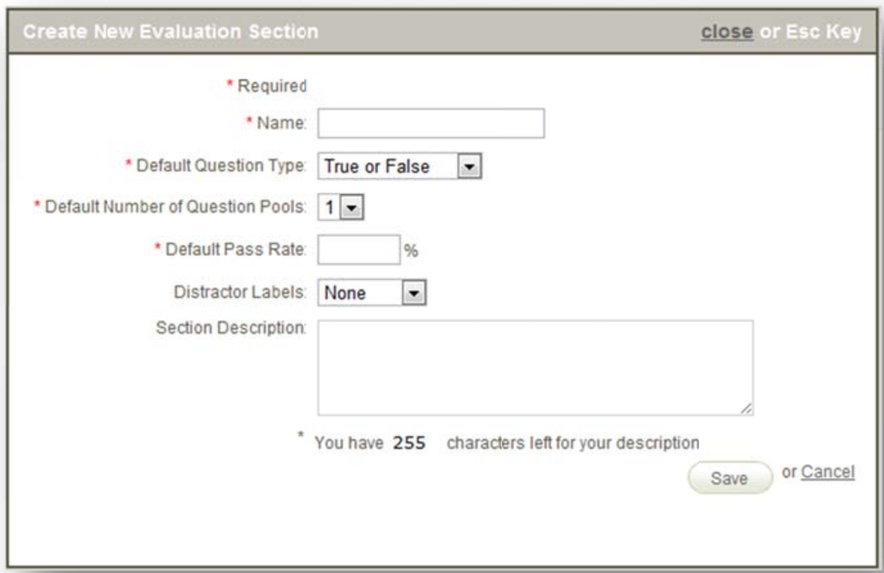
Open the evaluation. The sections that have been created are listed under the evaluation sections menu. Next to the name of each section is a number representing how many questions are within that section (9 in the example below).

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.

Required Fields

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.

You must make the Section active before Participants will be able to see it.



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

25.1.6 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.

25.2 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.

25.2.1 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.

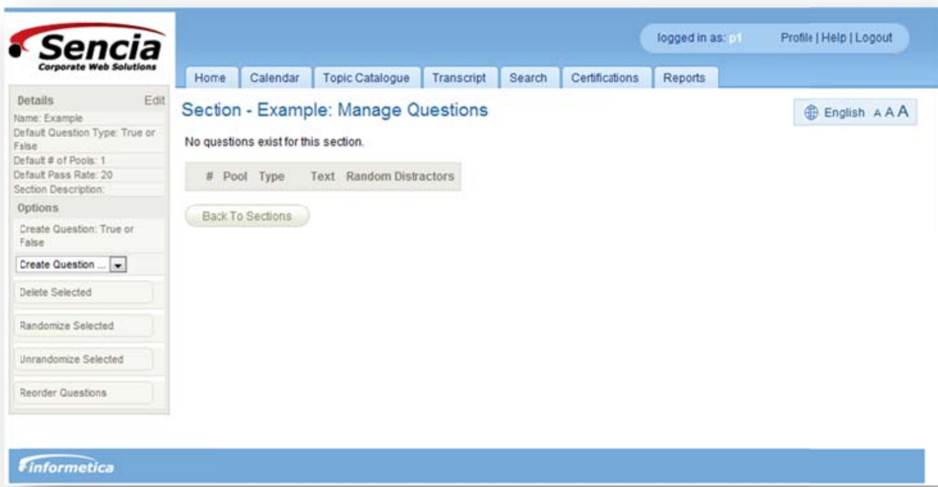
Multiple Choice questions requite the participant to select the correct answer from several offered choices. There is only one correct answer to this type of question since all items that are correct must be selected.

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.

25.2.2 Creating Questions

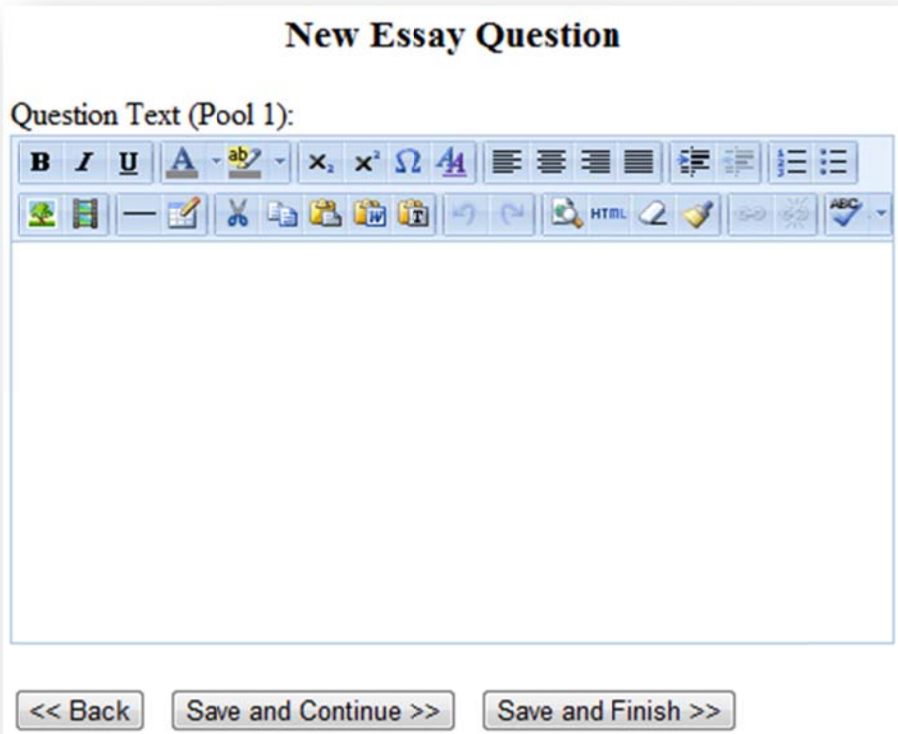
Questions are assigned an automatic number as you create them. This is the default order in which they are presented during an evaluation. In the evaluations section menu on the left, click the name of the section to open the manage questions page.



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.

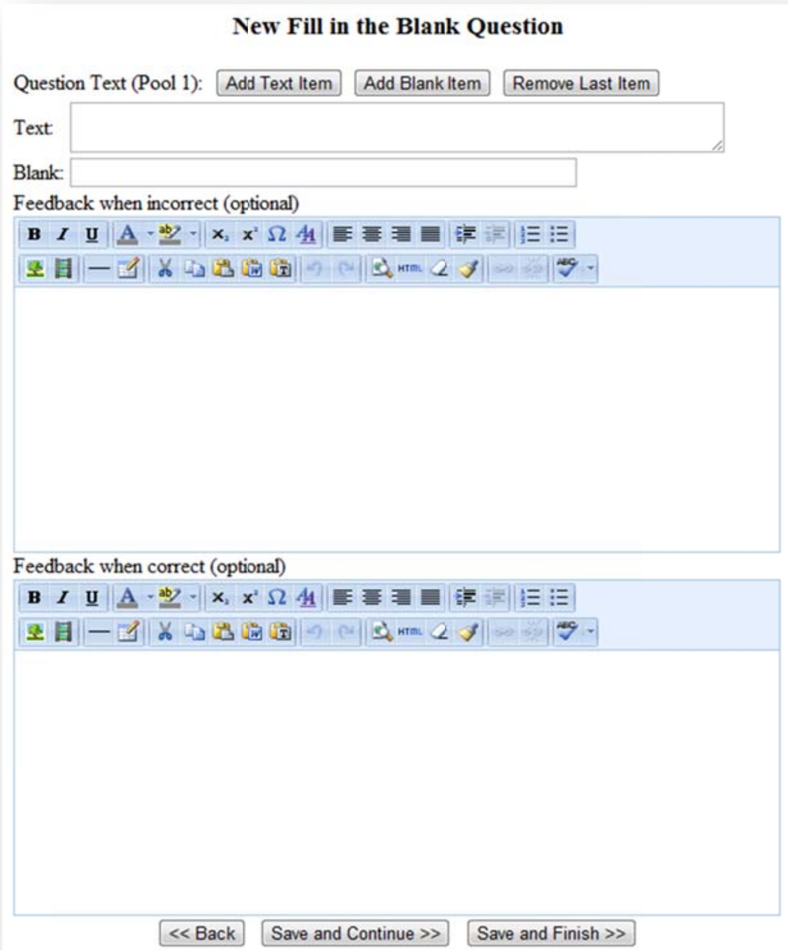
Back: This button will return you to the manage questions page without saving the question.

Save and Continue: This button will save the question and immediately let you create another essay question.

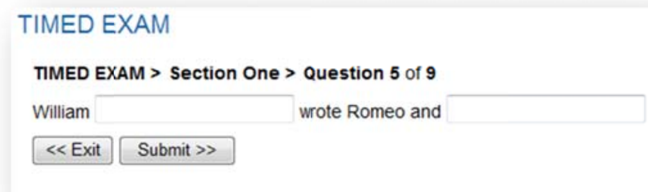
Save and Finish: This button will save the essay question and return you to the manage questions page.

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.

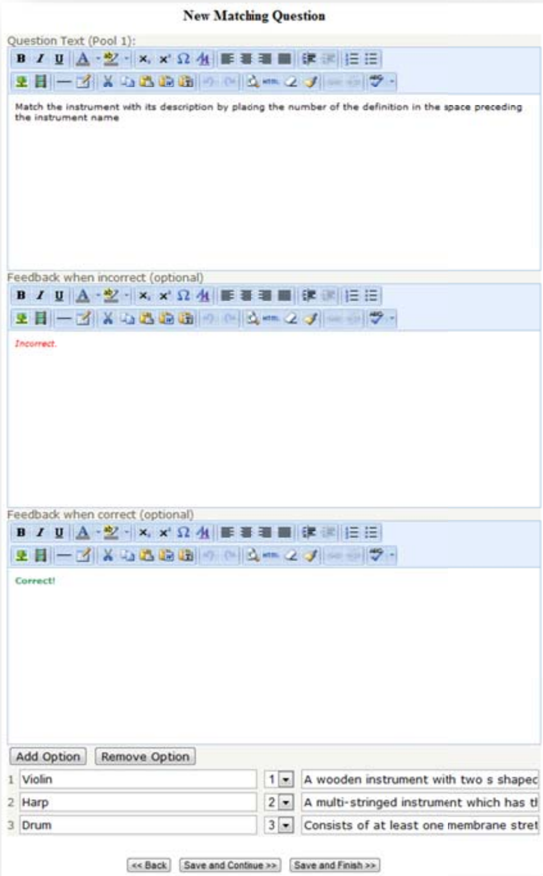
Back: This button will return you to the manage questions page without saving the question.

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.

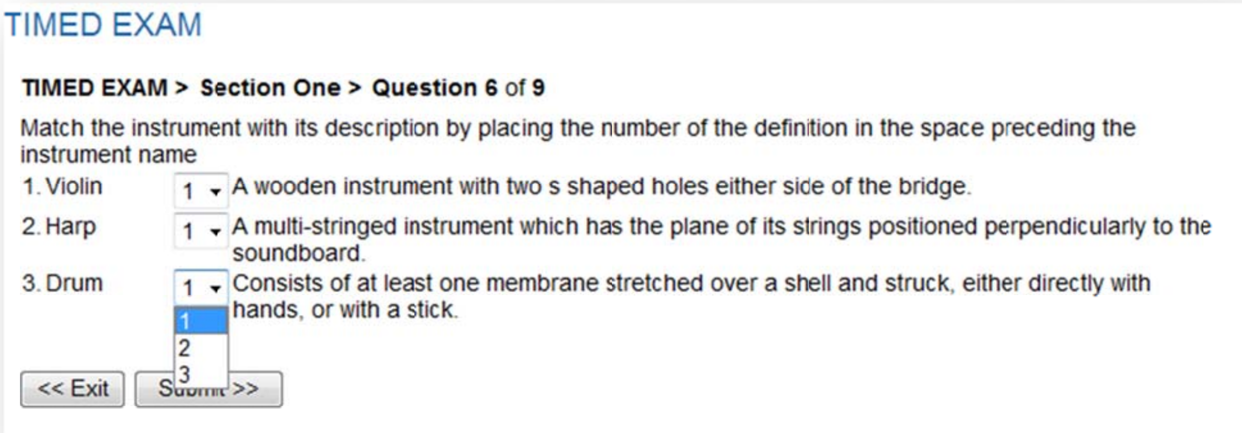
Feedback: - use the publishing windows to write optional feedback for correct and incorrect answers.

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.

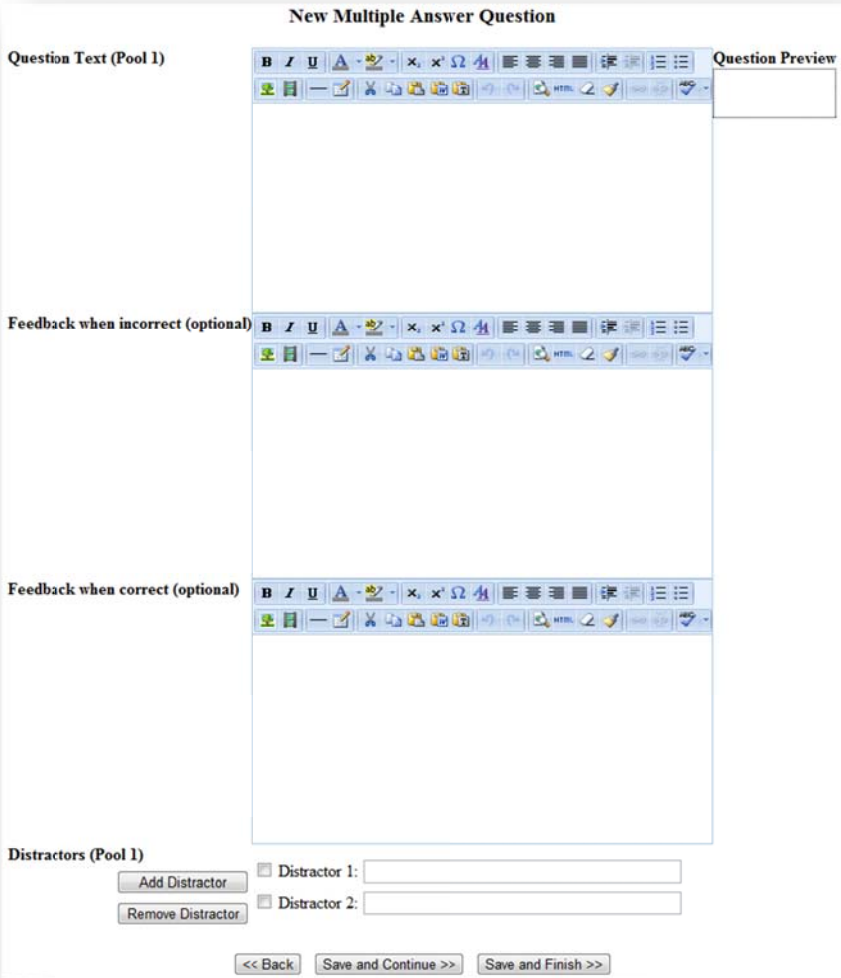


Back: This button will return you to the manage questions page without saving the question.

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.

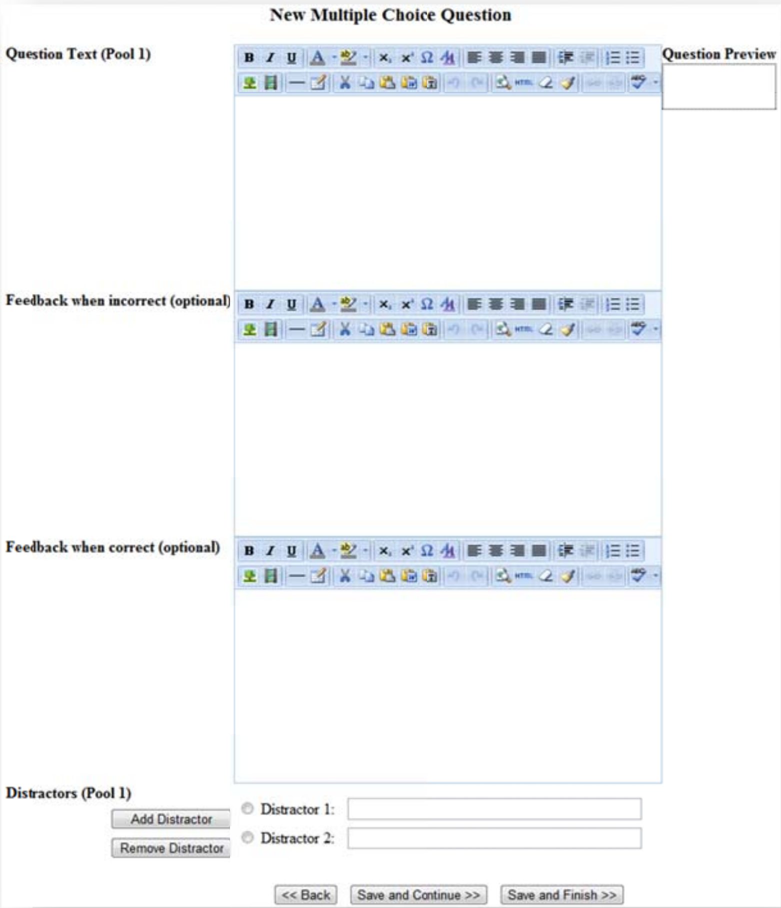
Feedback: - use the publishing windows to write optional feedback for correct and incorrect answers.

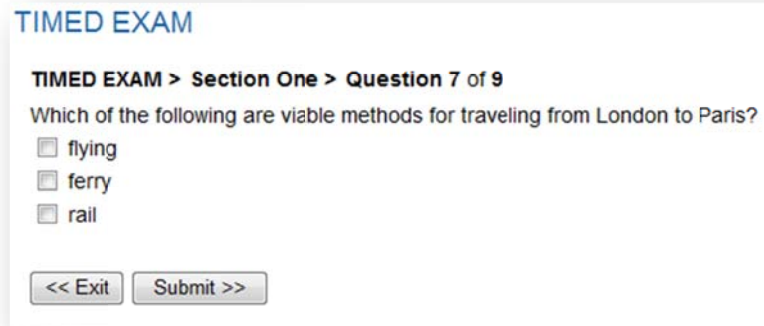
Distractors: Distractors are the list of answers offered as choices for the participant. For the answers that are correct selections, ensure that the box in front of the distractor is checked.

- 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.

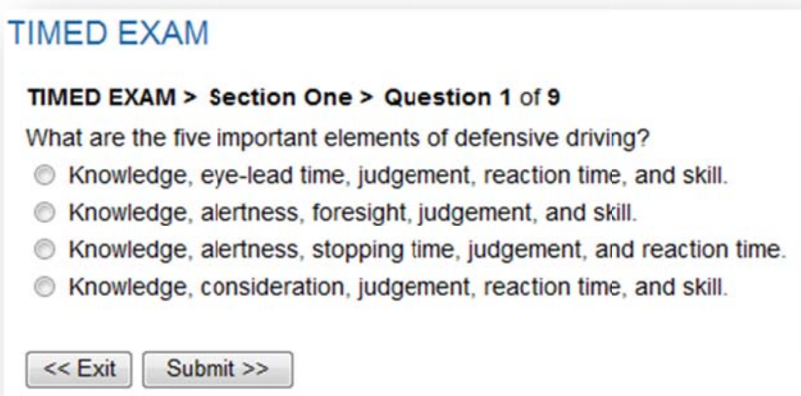
Question Text: Use the publishing window to design the question using whatever text and supporting files you want.

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.



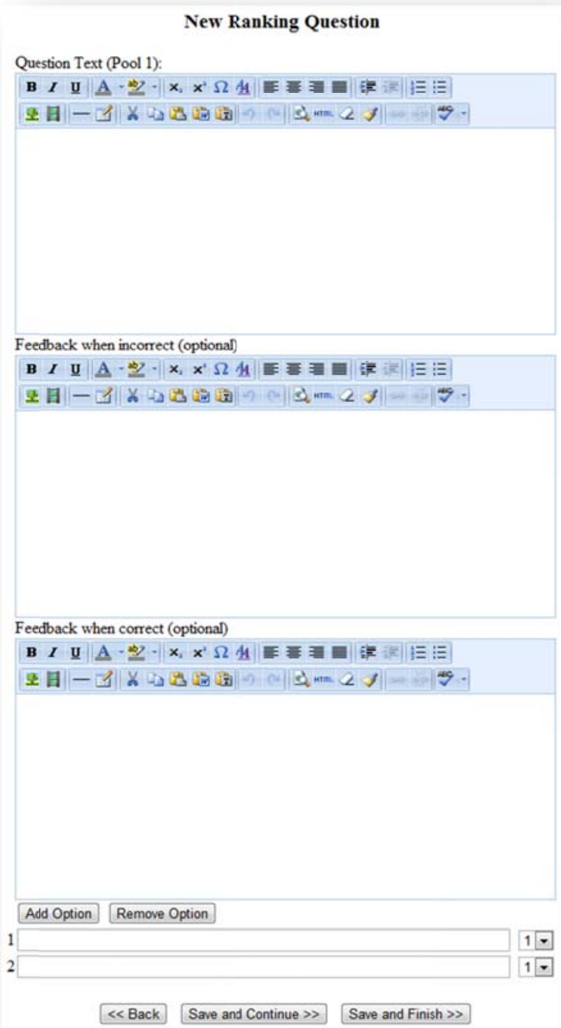
Back: This button will return you to the manage questions page without saving the question.

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.



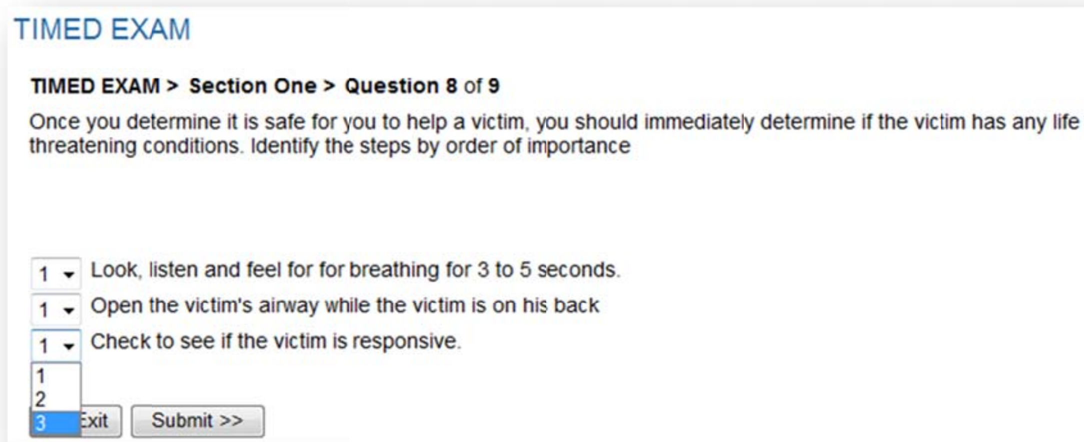
Question Text: Use the publishing window to design the question using whatever text and supporting files you want.

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.



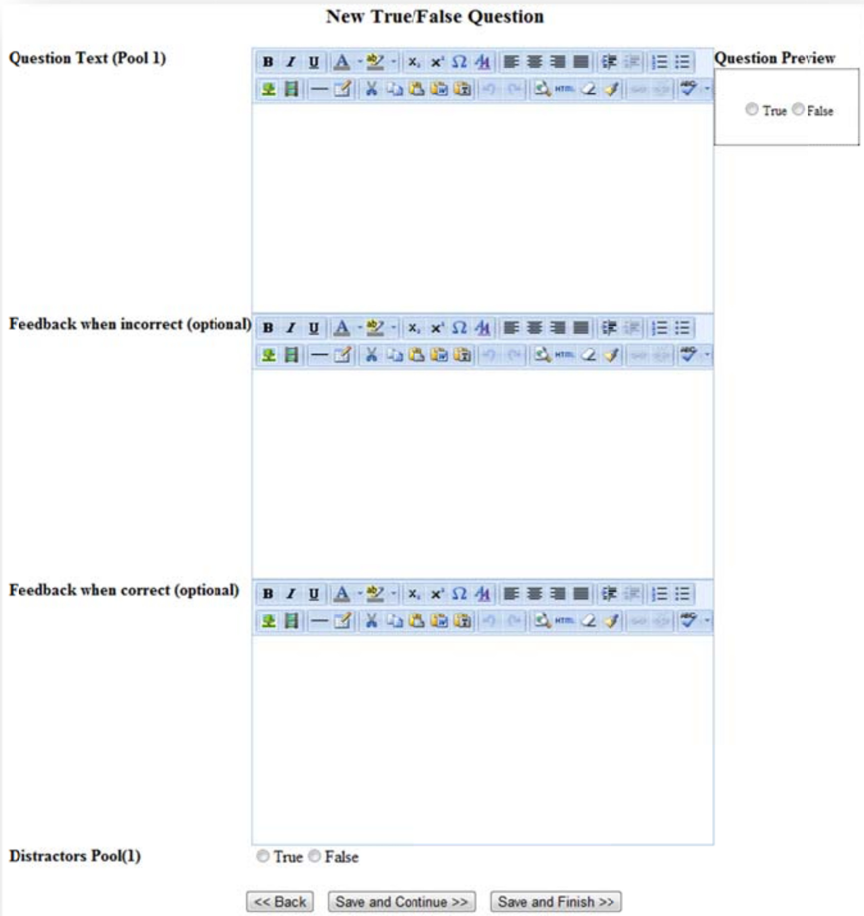
Back: This button will return you to the manage questions page without saving the question.

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.



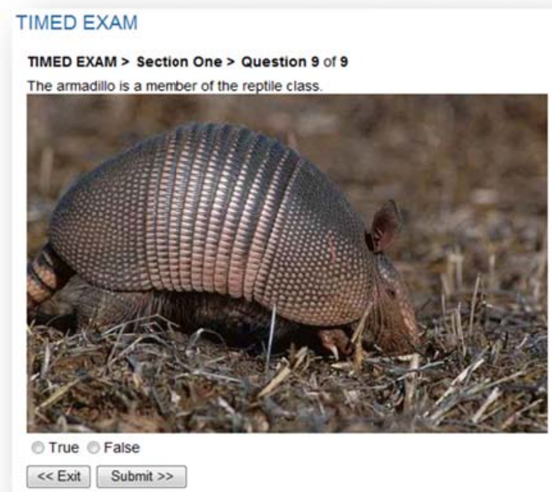
Question Text: Use the publishing window to design the question using whatever text and supporting files you want.

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.



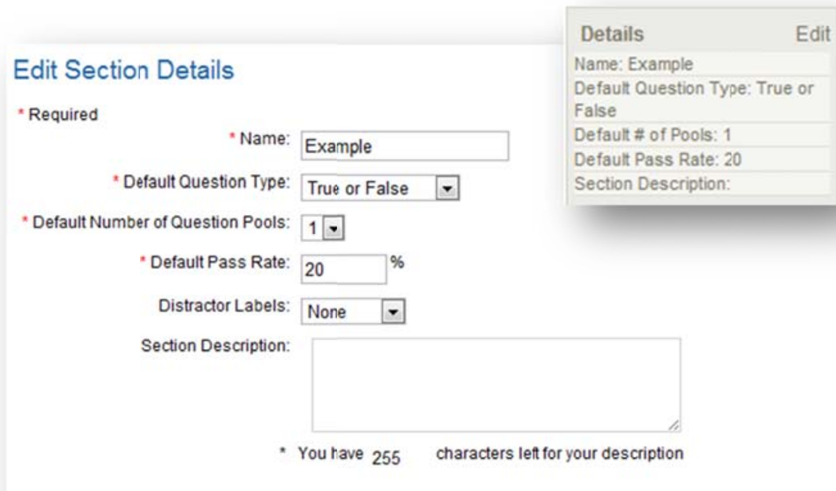
Back: This button will return you to the manage questions page without saving the question.

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.

25.3 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.



25.4 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.

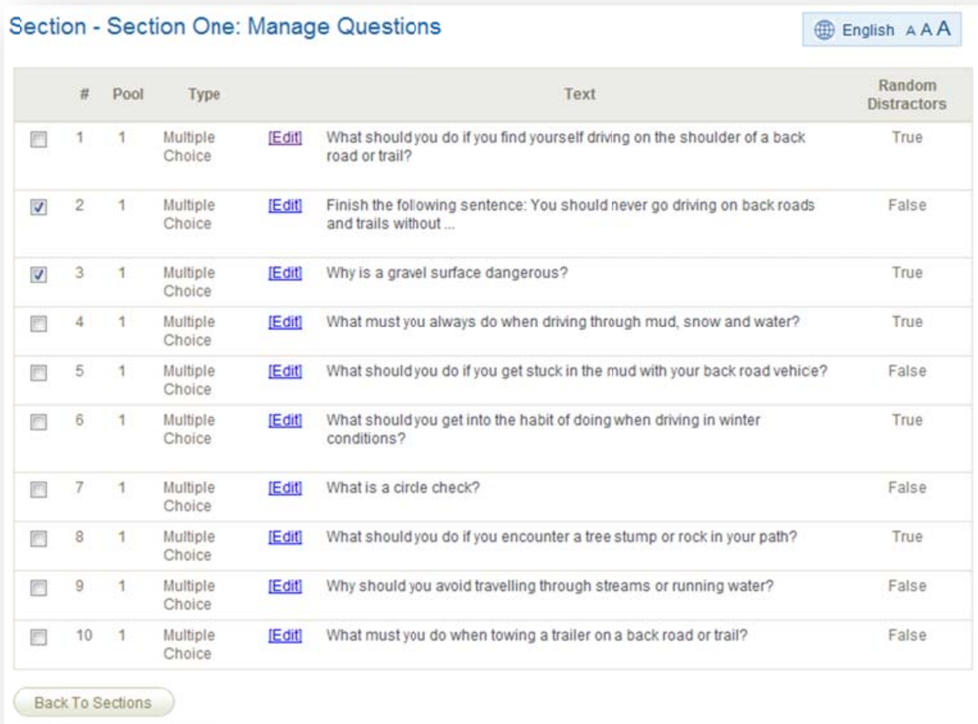
Manage Additional Information: Create a link to another relevant file within the product that participants will see linked at the bottom of the question.

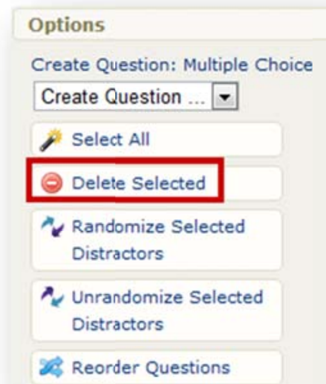
25.4.1 Manage Additional Information

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.

25.4.2 Delete Evaluation Questions

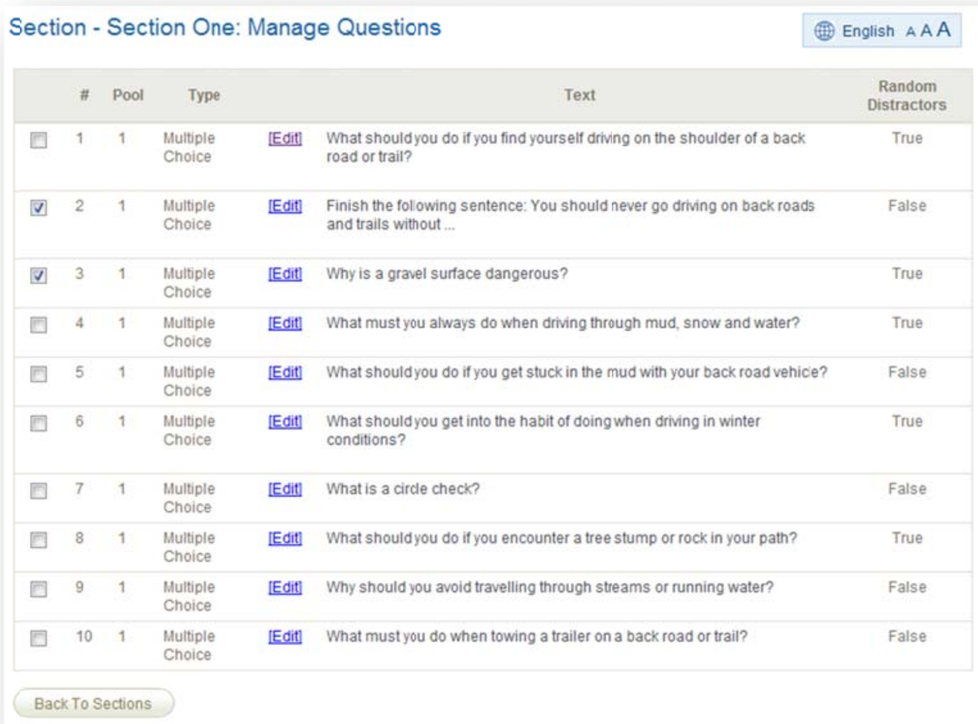
Click on the name of the evaluation section that you want to edit questions for. This will open the manage questions window. Select the questions you wish to delete using the checkboxes and then click **Delete Selected** from the options menu.





25.4.3 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.


Section - Section One: Manage Questions

English A A A

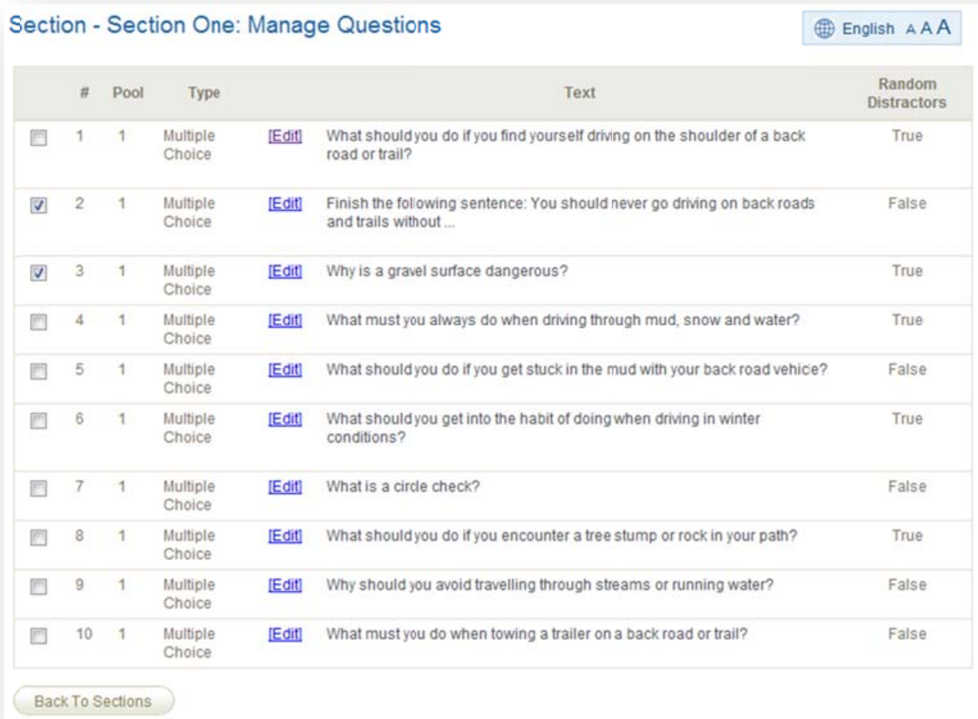
	#	Pool	Type		Text	Random Distractors
☐	1	1	Multiple Choice	[Edit]	What should you do if you find yourself driving on the shoulder of a back road or trail?	True
☑	2	1	Multiple Choice	[Edit]	Finish the following sentence: You should never go driving on back roads and trails without ...	False
☑	3	1	Multiple Choice	[Edit]	Why is a gravel surface dangerous?	True
☐	4	1	Multiple Choice	[Edit]	What must you always do when driving through mud, snow and water?	True
☐	5	1	Multiple Choice	[Edit]	What should you do if you get stuck in the mud with your back road vehice?	False
☐	6	1	Multiple Choice	[Edit]	What should you get into the habit of doing when driving in winter conditions?	True
☐	7	1	Multiple Choice	[Edit]	What is a circle check?	False
☐	8	1	Multiple Choice	[Edit]	What should you do if you encounter a tree stump or rock in your path?	True
☐	9	1	Multiple Choice	[Edit]	Why should you avoid travelling through streams or running water?	False
☐	10	1	Multiple Choice	[Edit]	What must you do when towing a trailer on a back road or trail?	False

Back To Sections

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.

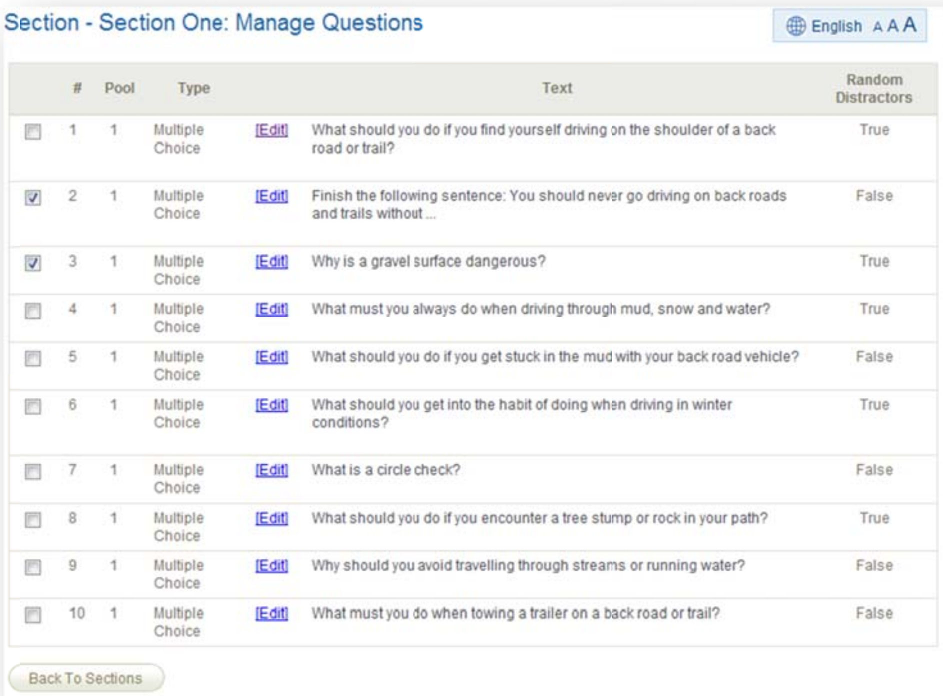
25.4.4 Unrandomize Evaluation Questions

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.

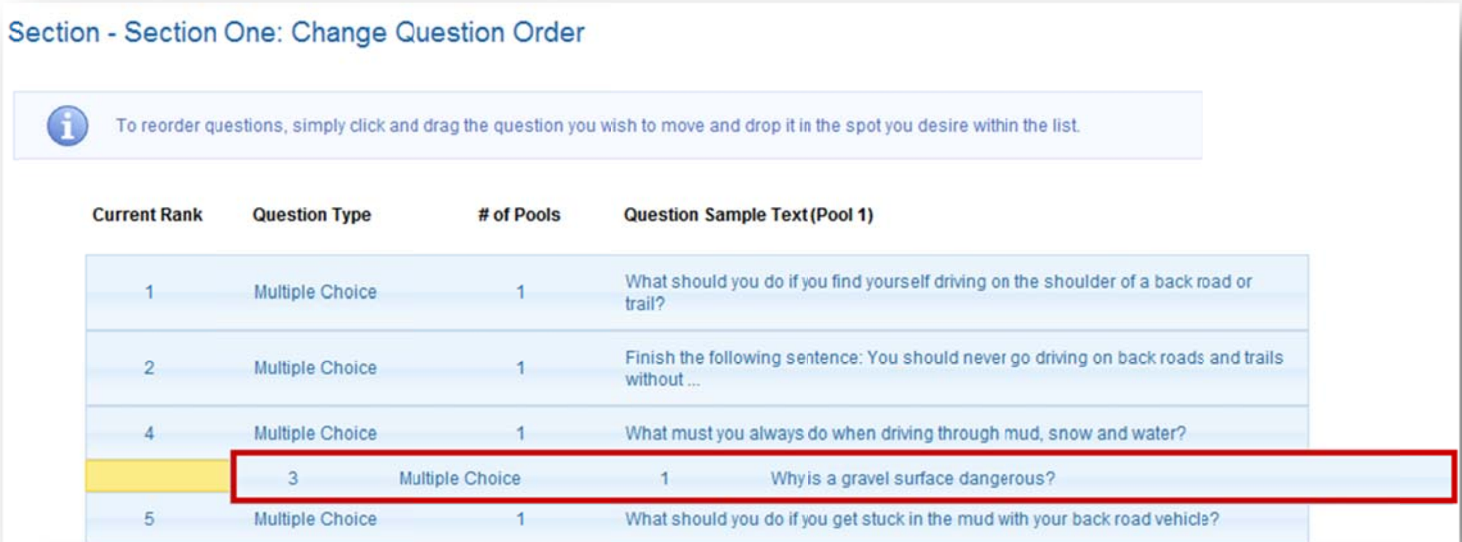


25.4.5 Reorder Questions

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.

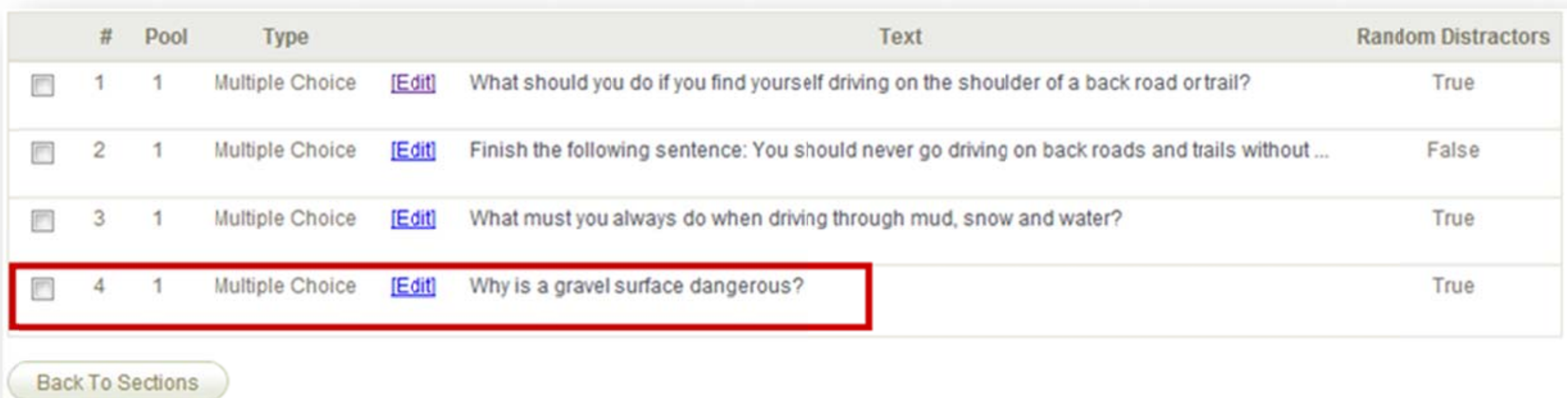


Section - Section One: Change Question Order

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.

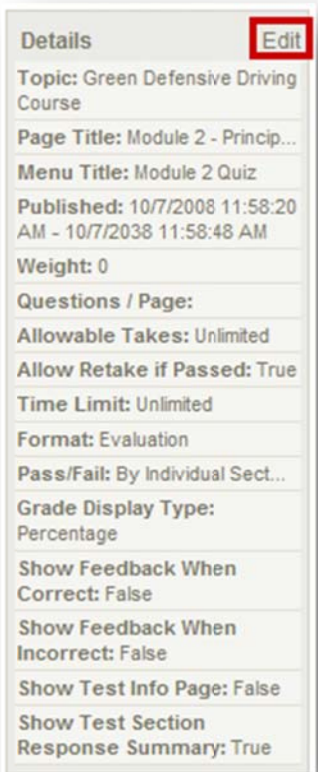


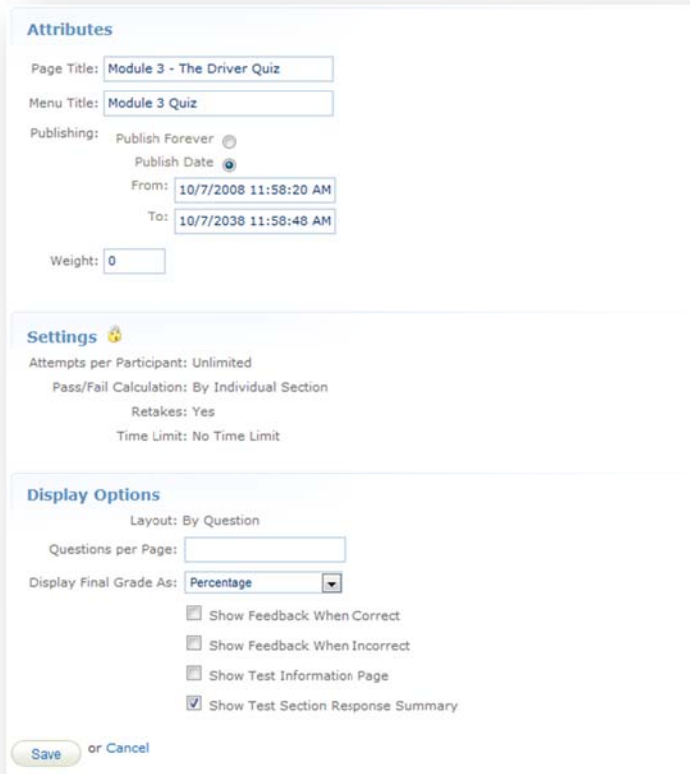
	#	Pool	Type		Text	Random Distractors
	1	1	Multiple Choice	[Edit]	What should you do if you find yourself driving on the shoulder of a back road or trail?	True
	2	1	Multiple Choice	[Edit]	Finish the following sentence: You should never go driving on back roads and trails without ...	False
	3	1	Multiple 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

25.5 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.



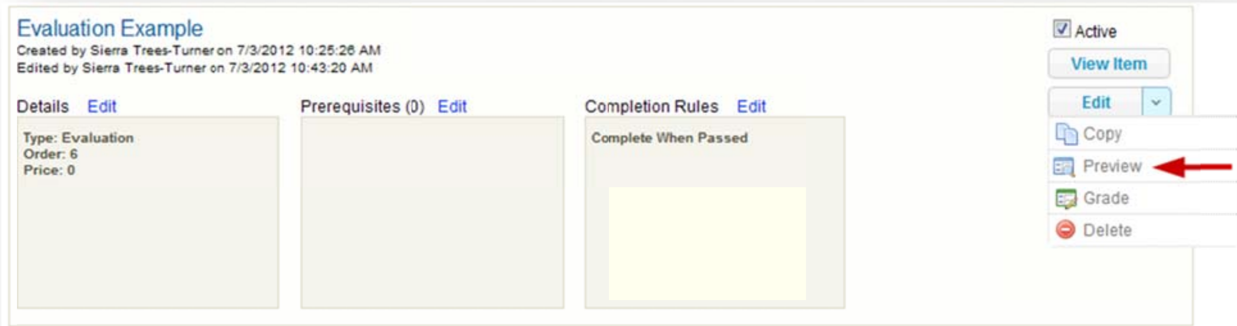


Required Fields

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.

25.6 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.



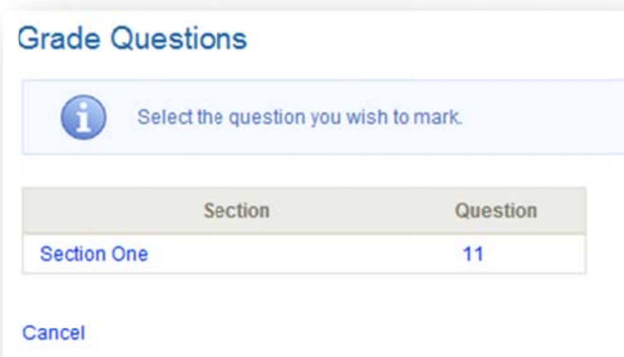
This will open a page that lists the questions in order, the answer options and an indication of the correct answer as well as correct and incorrect feedback.

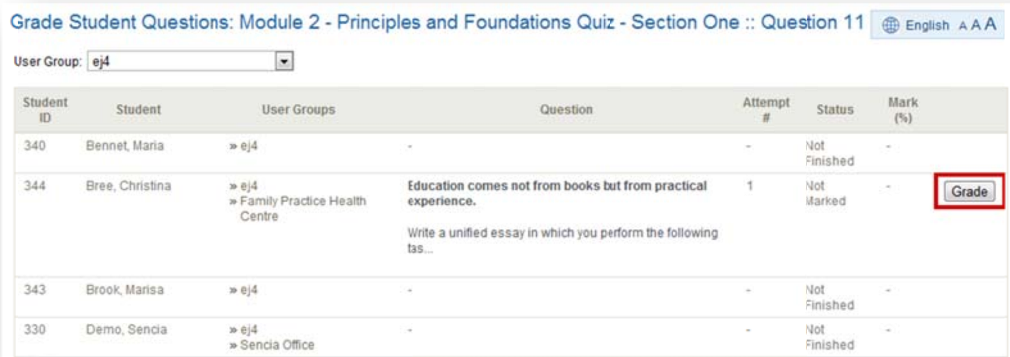
Question #	Pool #	Question Type	Question Text	Distractors / Answers	Feedback (Incorrect)	Feedback (Correct)
1	1	Multiple Choice	What are the five important elements of defensive driving?	[x] Knowledge, alertness, foresight, judgement, and skill. [ ] Knowledge, alertness, stopping time, judgement, and 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.

25.7 Grade Questions

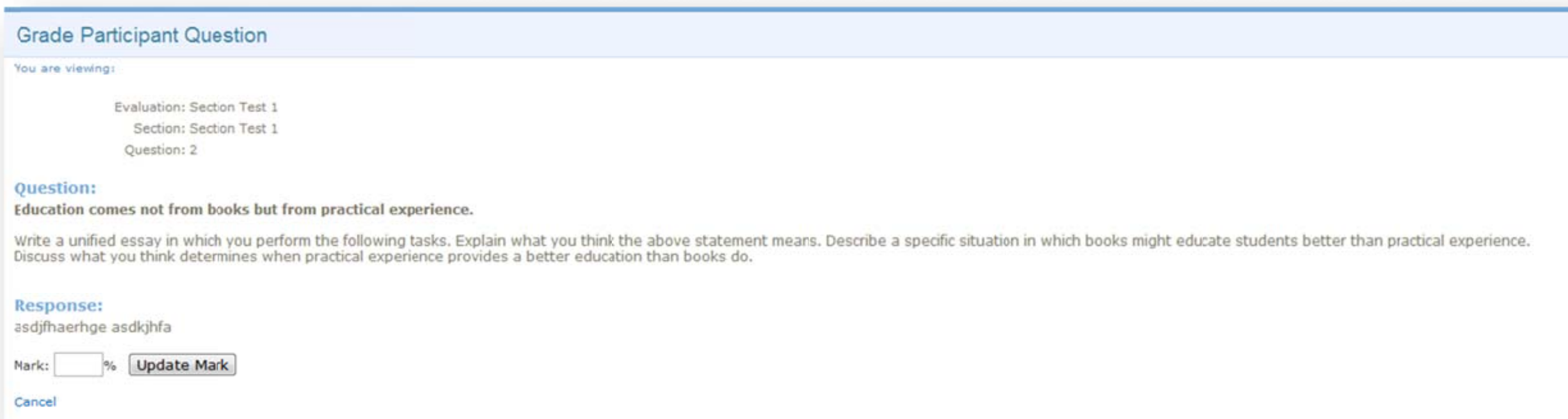
This option is used to grade essay questions (essay questions cannot be automatically graded by the system) or by site managers who need to override a participant's answer. Open the product in which you would like to grade an evaluation and navigate to the manage assets page. Click **Grade** for the 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.



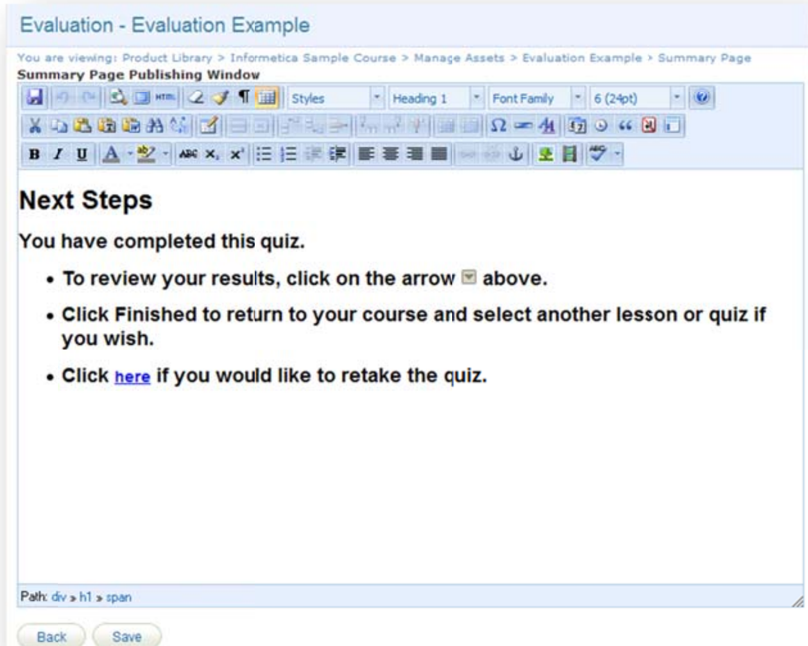


This will open the "Grade Participant Question" page. Enter a grade for the question in the Mark field and then click **Update Mark**. You can **Cancel** to go back to the list of participants for this question.

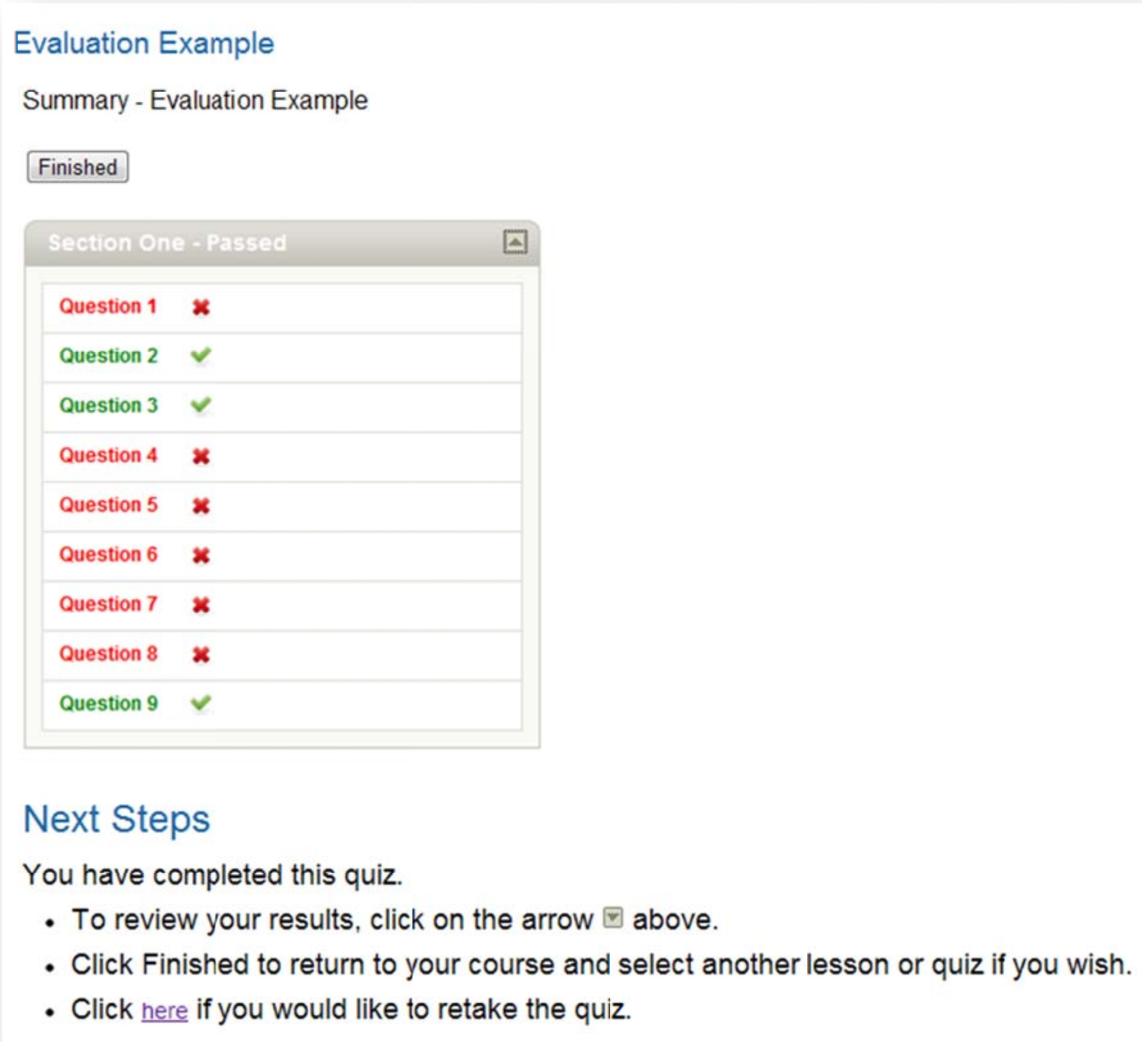


25.8 Create an Evaluation Summary

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.



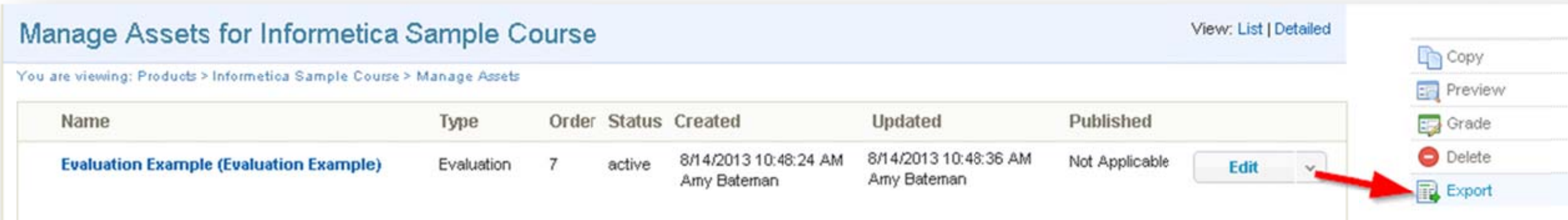
What Should I Write in the Customized Summary?

This is a great place to let your participants know what their next steps should be after completing the evaluation.

25.9 Question Export

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.



1. From the manage assets page, select the down arrow on the **Edit** button for the evaluation you would like to export.
2. Select **Export.**
3. When the confirm window appears, **Save** the resulting XML file.

What is QTI?

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.

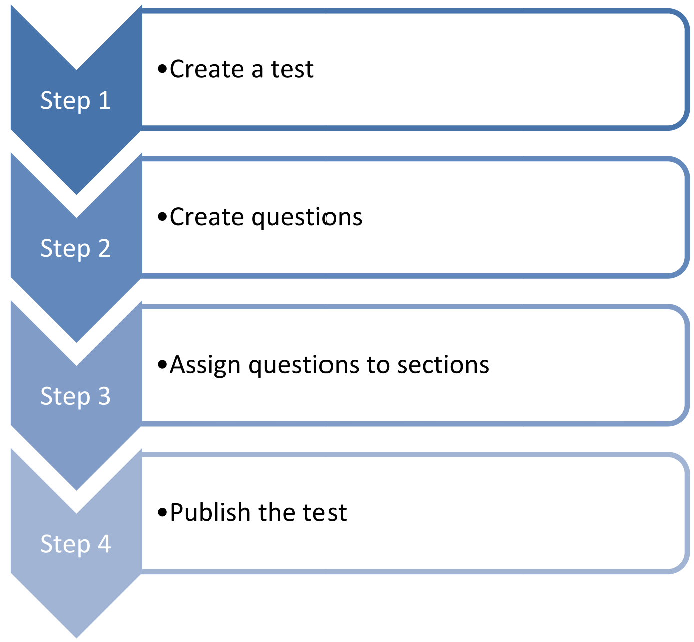
Some factors to consider when using the QTI Export tool:

- 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.
- QTI Export does not consider pools. All questions are exported as a unique question whether they are in pools or not.
- An XML File is generated upon QTI Export and can be imported into Prova Tests.

26. Prova Tests

Topics Covered In This Chapter

Prova Creation Overview



SECTIONS

CONCLUSION PAGE

EXIT NAVIGATION

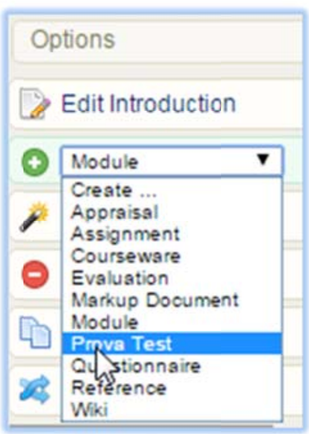
PUBLISH

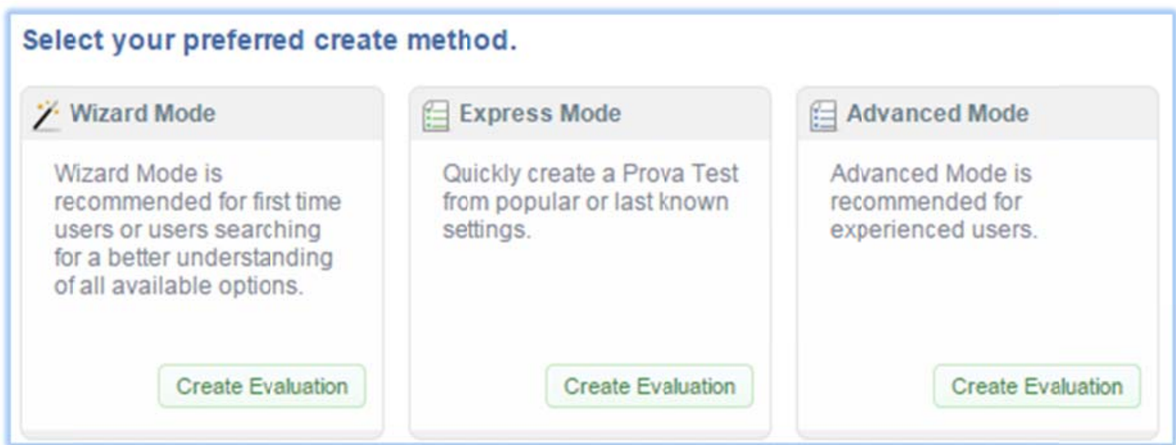
MANUAL GRADING

Prova tests are automatically graded and can be used to determine a participant's knowledge of your content. Apply passing grades, prerequisites, weights, randomize answer options, create question pools, test by section or by question, give feedback for answers, and offer a variety of question types. You can incorporate audio, video, graphics, hyperlinks and more.

Create a New Test

From the manage assets pages, click **Create** from the options menu and then select **Prova Test** from the dropdown menu. You must then choose one of the three different methods to create a Prova test. Each method is explained in detail below. Whichever method you choose, you can change the default options later from the configuration menu. .





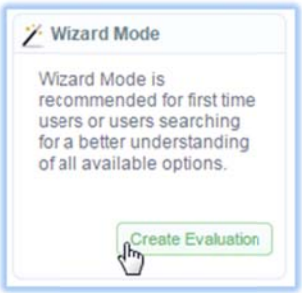
Drafts

Prova tests are created and edited as drafts. A draft cannot be attempted by participants until published. See the Publish portion of this chapter.

Unpublished Prova drafts are indicated on the manage assets page.

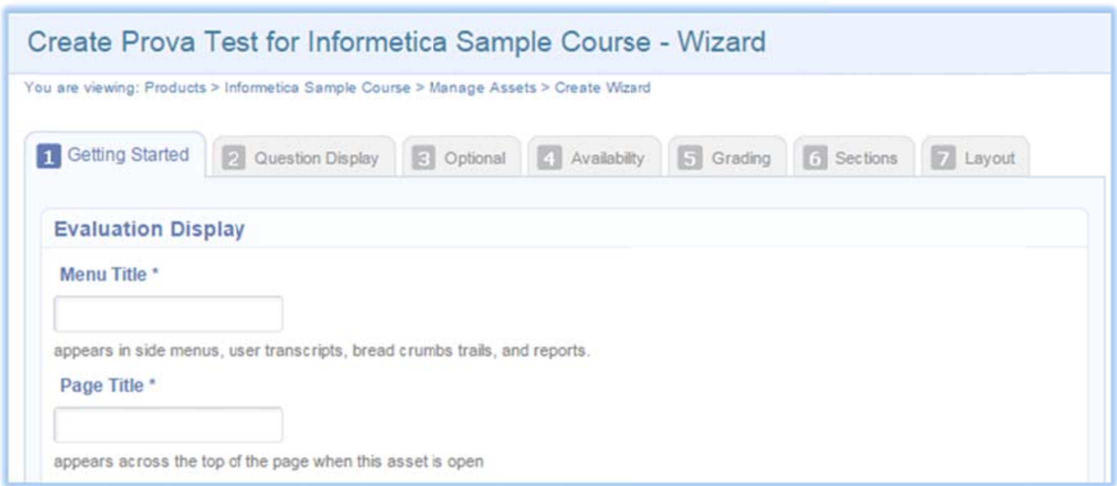
Name	Type	Order	Status	Created	Updated	Published	
Sencia Staff Trivia (Sencia Staff Trivia)	Prova Evaluation	1	draft	7/13/2012 8:49:13 AM Sierra Trees-Turner	2/1/2013 10:05:48 AM Amy Bateman	Unpublished Draft	Edit

26.1.1 Creation Using Wizard Mode



Wizard Mode is recommended for first time users or users searching for a better understanding of all available options. Wizard mode guides you through a seven step process for creating a test, including one optional step. Select **Create Evaluation** 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 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 in this chapter for details on each of the configurations.



Summary of the Wizard Steps

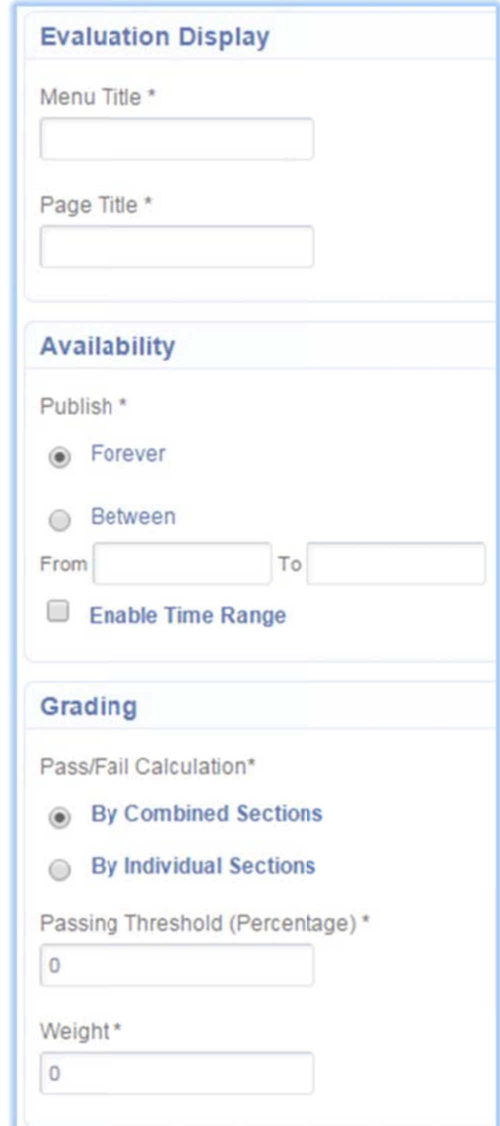
1. **Getting Starting:** Give your evaluation a title and other important display information.
2. **Question Display:** Determine how many questions should appear on each test page.
3. **Optional:** These default configurations (such as feedback options) are completely optional so this step can be skipped, if desired.
4. **Availability:** Define the number of test attempts and the dates the test will be available.
5. **Grading:** Define the passing grade and how the grade should appear to participants.
6. **Sections:** Set up more than one section and opt randomize question order.
7. **Layout:** Opt to use a graphical design package for the test.

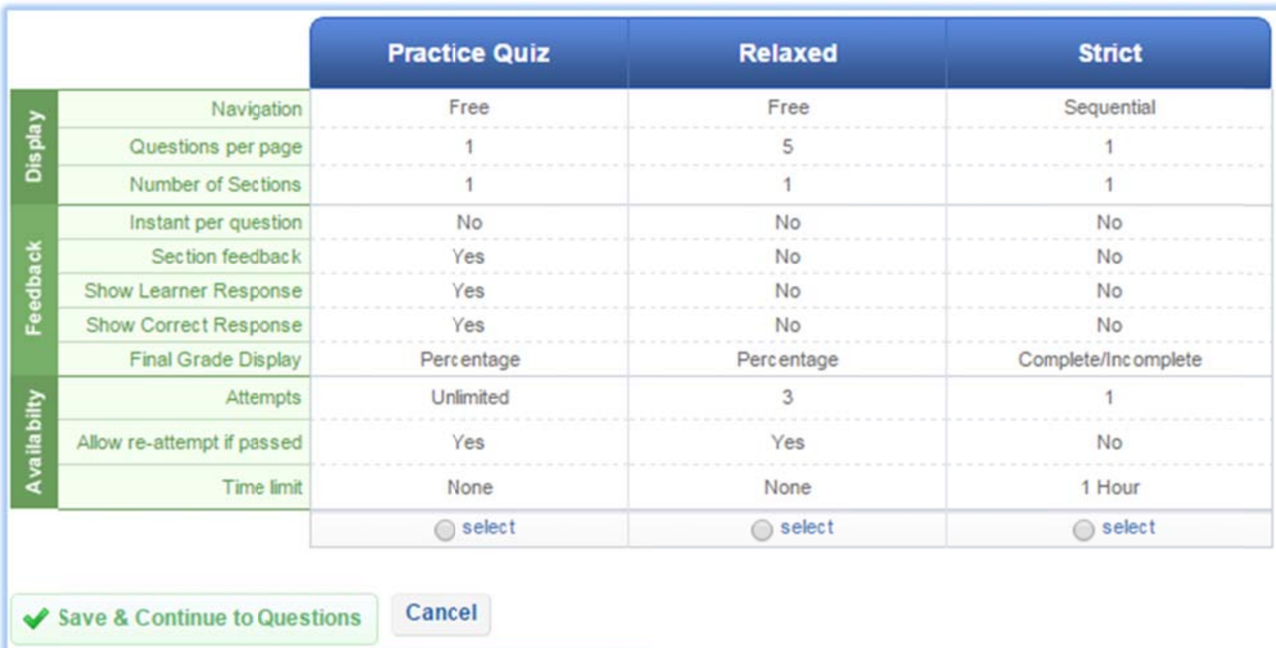
26.1.2 Creation Using Express Mode

Express Mode lets you quickly create a test from popular settings. Express mode has only one page of required configurations to set up, and then makes assumptions for many of the details, based on the type of test you select. The test details you set up while in express mode can be changed from the configuration menu later.

See Configuration in this chapter for details on each of the configurations.

Select **Create Evaluation** at the bottom of the express mode box. Complete the form for Evaluation Display, Availability, and Grading options, and then 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. Select **Save & Continue to Questions** 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	No	No	No
	Section feedback	Yes	No	No
	Show Learner Response	Yes	No	No
	Show Correct Response	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

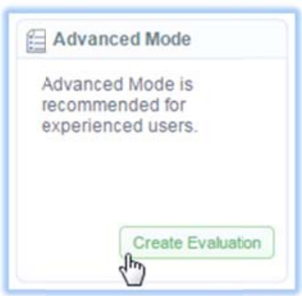
Save & Continue to Questions   Cancel

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.

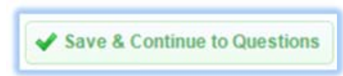
Relaxed: Is set up so participants have as much time as they need to complete the test. Five questions are shown per page and participants will not know which questions they get correct or incorrect during the exam. The exam can be attempted three times, and can be taken again if it is passed.

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.

26.1.3 Creation Using Advanced Mode

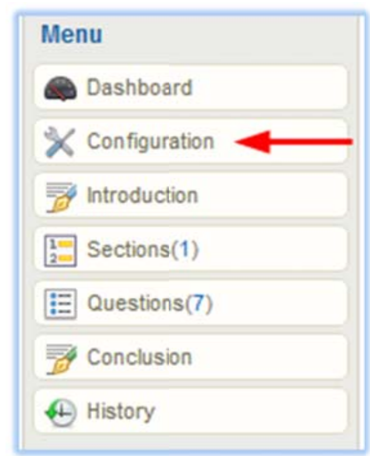


Advanced Mode is recommended for experienced users, this mode will let you create the entire test manually. Advanced mode includes all of the test configurations on one page, but instead of using a wizard to help explain and guide you through them, the options are laid out in more of a line list format 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. The test details you set up while in advanced mode can always be changed from the configuration menu later. ***See Configuration in this chapter for details on each of the configurations.*** Select **Create Evaluation** at the bottom of the advanced mode box. Once you have filled out the form, select **Save & Continue to Questions** at the bottom of the page.

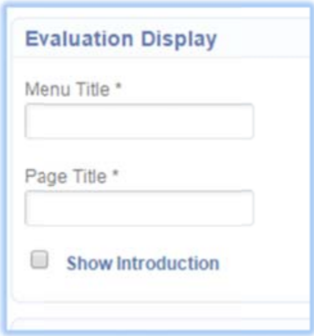


Configuration

Configuration is where you can set up and edit the details and behavior of a test. 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.



26.1.4 Evaluation Display



Menu Title: Appears in side menus, user transcripts, bread crumb trails, and reports.

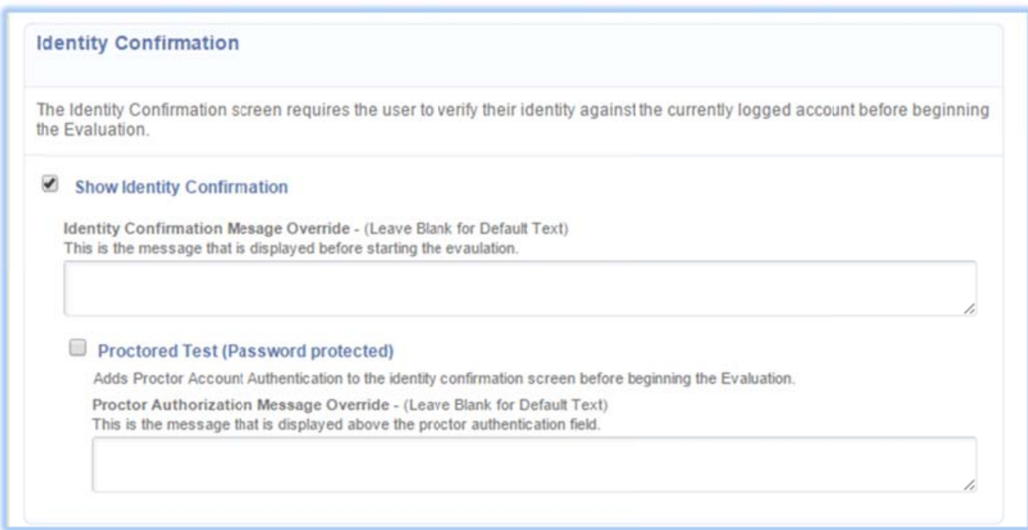
Page Title: Appears across the top of the page when the test is open.

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.

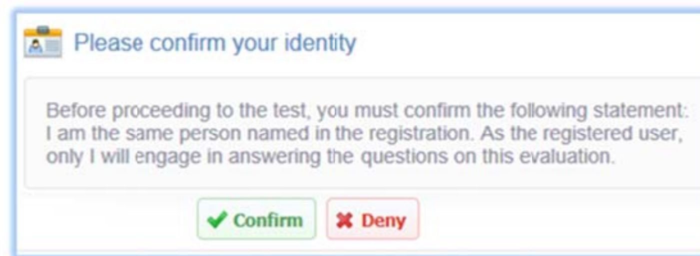
Tidy Menus

Menus have limited display areas, so avoid long menu titles that can make displays look cramped and untidy.

26.1.5 Identity Confirmation and Proctored Tests

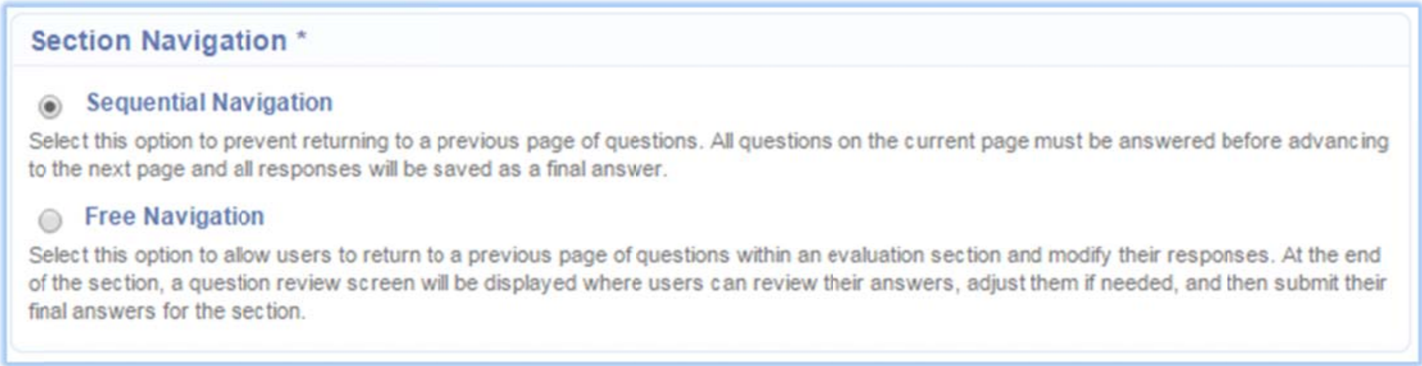


Identity Confirmation: An identity confirmation screen requires participants to verify their identity against the currently logged account before beginning the test. **Deny** will log them out of the system.



Proctored Test: Creating a proctored exam requires that a Proctor must sign in to authorize the exam before the user may attempt the test. This option is used for exams that are administered under supervision. You must have Show Identity Confirmation enabled to select this option.

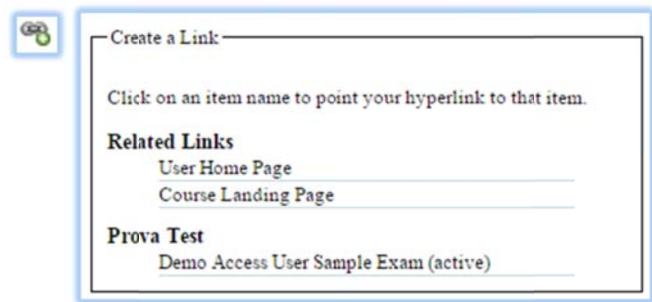
26.1.6 Section Navigation



Sequential Navigation prevents 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** allows users to return to previous questions within a section to review and modify their responses before submitting their final answers.

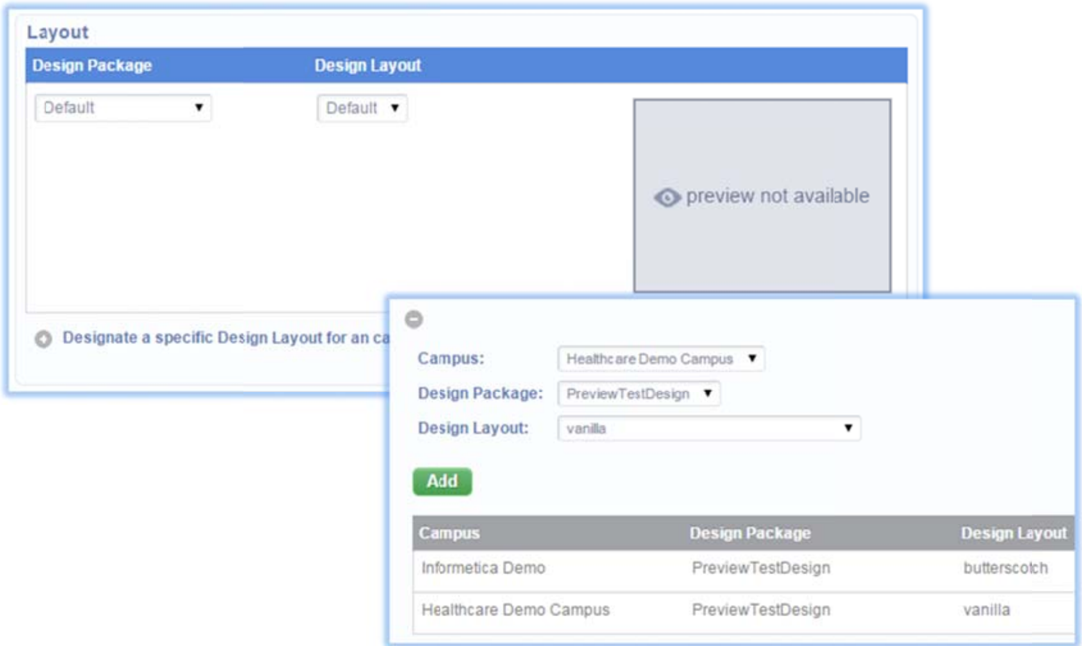
26.1.7 Test Completion Redirect URLs

On Successful Completion: Enter the URL 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 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.

26.1.8 Layout and Question Display



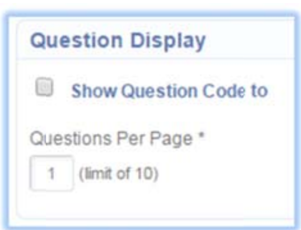
Design Package: Select a design package to apply to this test.

Design Layout: Select a layout from the design package you selected.

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

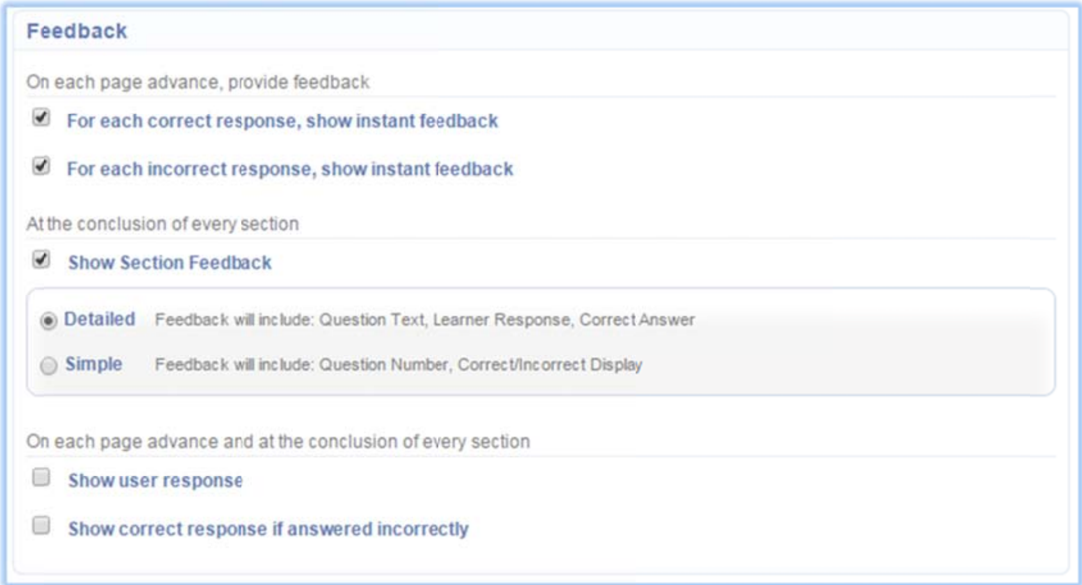
Repeat the process for as many campuses as you like. To remove a campus design, use the **delete** button next to the design.



Show Question Code: Select to display an identification code for each question to learners. The test author is responsible for entering an identification code for each question. Codes are 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.

26.1.9 Feedback



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.

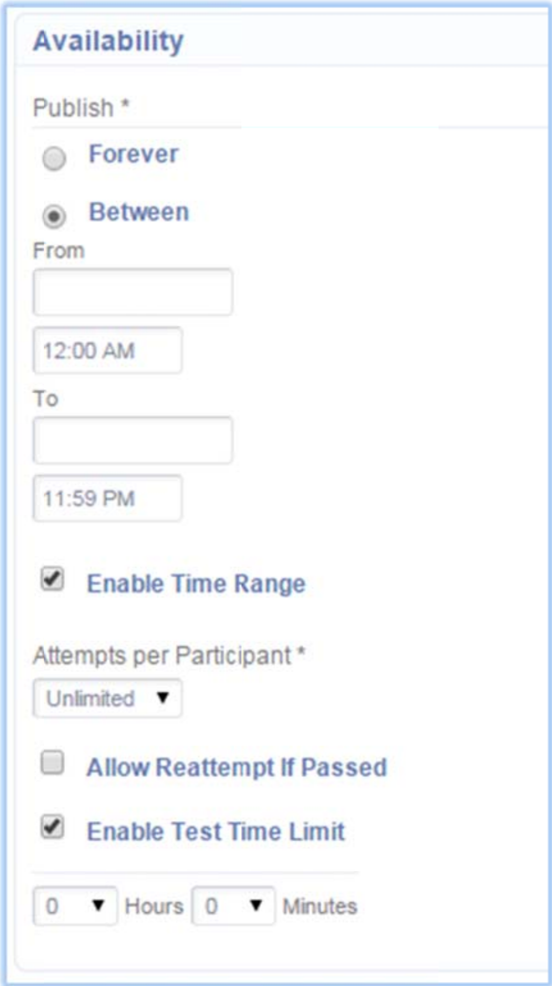
Show Section Feedback: Select to show feedback at the end of the section.

- 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.

26.1.10 Availability



Publish Forever: Create a test that is always available to enrolled participants.

Publish Between: Create a test that is 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.

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*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.*

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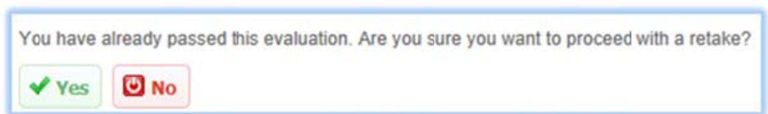
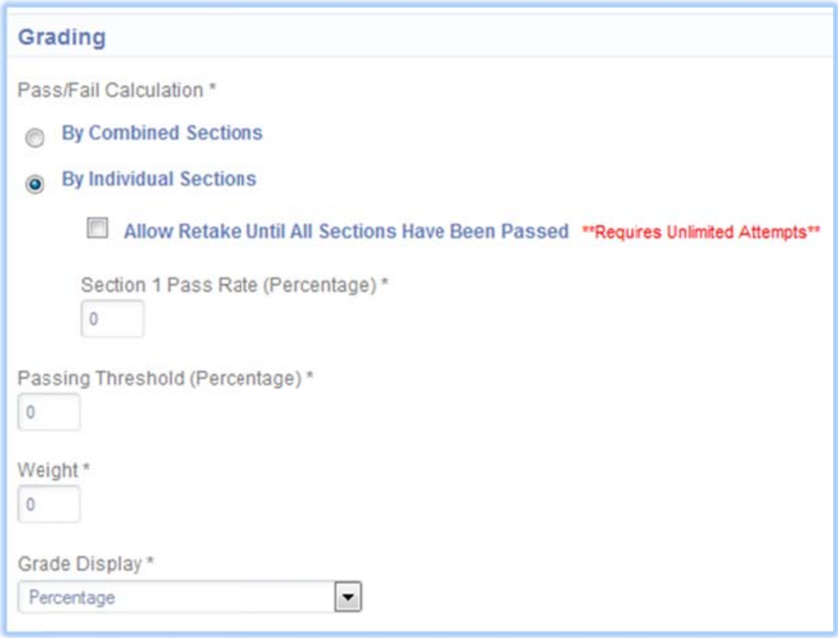
*When retakes are enabled in combination with a pass/fail calculation by **combined sections,** then a participant may reattempt the test, assuming that the product itself allows retakes.*



Time Limit: Select hours and minutes to define the time allowed for completing the test. The amount of time remaining appears at the top of every question page during a test in progress.

26.1.11 Grading



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.

- **Allow Retake Until All Sections Have Been Passed:** Toggle this option on so that your users may retake any sections they failed, but are not required to retake any passed sections. **Note!** Selecting this option also forces the **attempts per participant** to unlimited.
- **Pass Rate**: enter the passing grade requirement for each section
- You must have the **Pass/Fail Calculation** set to **Individual Sections**
- **Attempts per Participant** must remain at **Unlimited**

If the Pass/Fail calculation or attempts per participant do not meet these criteria, this feature will be automatically disabled.

Passing Threshold: Enter the percentage of correct questions required to pass this test and individual sections if applicable). 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, or Percentage to the participant.

Weight: Enter a percentage that the test is worth towards the entire product's grade, if applicable. The weight of each test is used to calculate the participant's final score for 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:

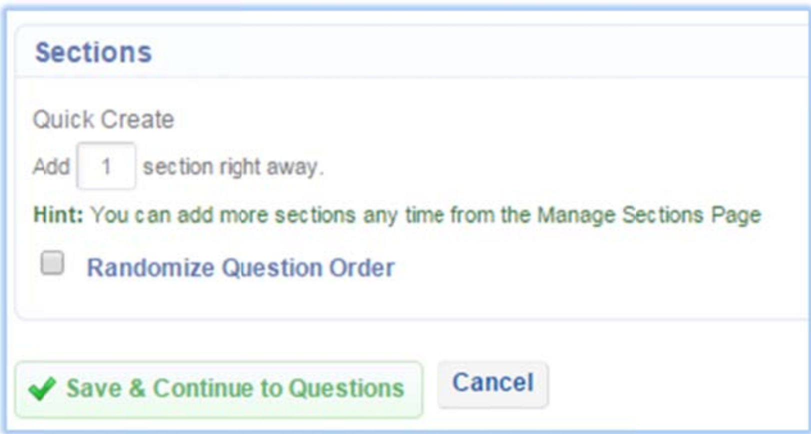
- Complete/Incomplete displays grade results as complete or not complete.
- Pass/Fail displays grade results as an overall pass or fail result.
- Percentage displays grade results as a percentage (default option).

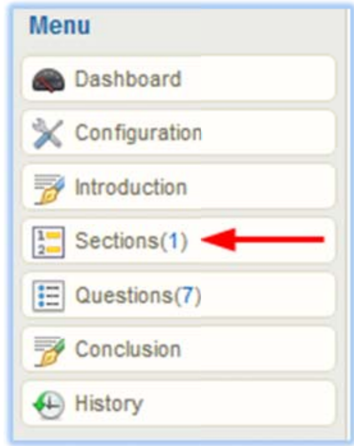
What if no Grade is Necessary?

Enter a 0 for the **Passing Threshold** to create a test with no passing grade, such as a practice test.

26.1.12 Sections

The Section configuration is only seen during initial set up of a test, but not when editing a test configuration. You can add more sections later from the **Sections** in the menu, if desired. Details about sections can be found in the Sections portion of this chapter.





Quick Create: Enter the number of sections you want to have in this test. All tests must contain at least one section. You can add more sections later from the **Sections** in the menu, if desired.

Randomize Question Order: Select this to have questions within each section presented to participants in random order.

26.1.13 Create a Test That Must Be Passed

If you require that users must continue to take a test until they have passed it, then here are the required configuration(s) for some scenarios.

Scenario 1: Users must pass the test - Requires that users reattempt the test until it's passed. Required configuration(s):

- Attempts per Participant must be set to UNLIMITED. *Availability > Attempts per Participant > Unlimited*
- Passing Threshold but be set greater than 0. *Grading > By Combined Sections > Passing Threshold*

Scenario 2: User must pass all sections - Requires that users reattempt the test until each test section is passed. Required configuration(s):

- Attempts per Participant must be set to UNLIMITED. *Availability > Attempts per Participant > Unlimited*
- Grade by Individual Sections. *Grading > By Individual Sections > *Allow Retake Until All Sections Have Been Passed> Section Rate Pass*

Scenario 3: User must answer all questions correctly - Requires that users reattempt the test until all questions are answered correctly. You may also configure the test so that users only need to reattempt the questions that they missed. Required configuration(s):

- Attempts per Participant must be set to UNLIMITED. *Availability > Attempts per Participant > Unlimited*
- Grade by Individual Sections. *Grading > By Individual Sections > Allow Retake Until All Sections Have Been Passed > Section Rate Pass*
- Each question must be in a separate section. So if the test has 100 questions, you will have 100 sections with one question in each.

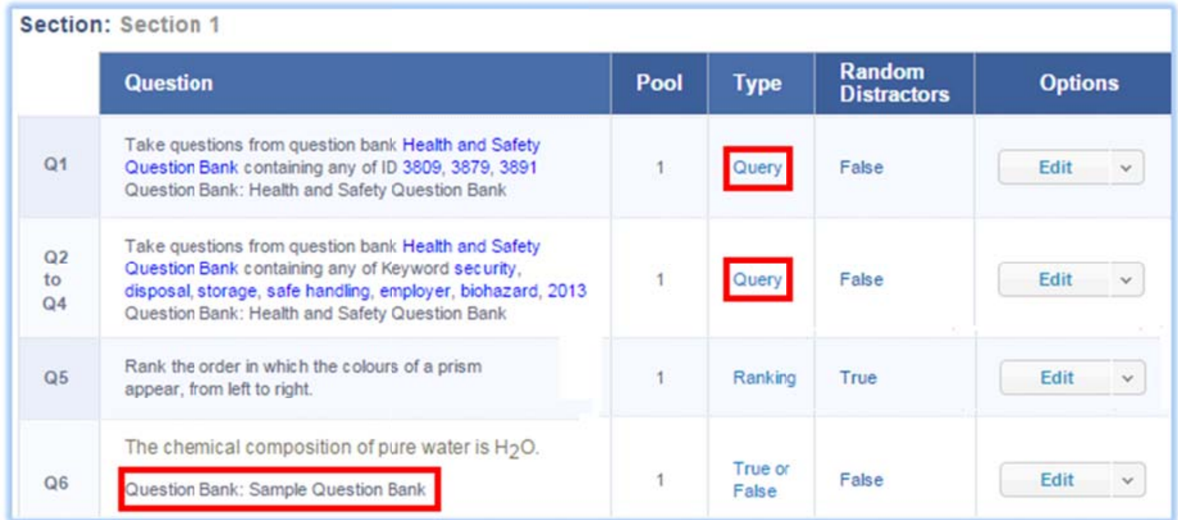
Test Questions

Immediately after creating a new test, you will be prompted to create questions. There are several methods for populating questions for a test; each is discussed in this section.

- Create questions directly within the test
- Import questions
- Select pre-created questions from question banks to use in the test

What about Unanswered Questions?

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.



Section: Section 1

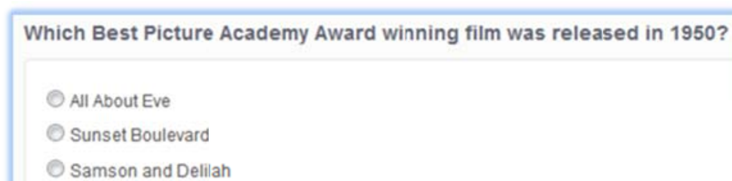
	Question	Pool	Type	Random Distractors	Options
Q1	Take questions from question bank Health and Safety Question Bank containing any of ID 3809, 3879, 3891 Question Bank: Health and Safety Question Bank	1	Query	False	Edit
Q2 to Q4	Take questions from question bank Health and Safety Question Bank containing any of Keyword security, disposal, storage, safe handling, employer, biohazard, 2013 Question Bank: Health and Safety Question Bank	1	Query	False	Edit
Q5	Rank the order in which the colours of a prism appear, from left to right.	1	Ranking	True	Edit
Q6	The chemical composition of pure water is H_2O. Question Bank: Sample Question Bank	1	True or False	False	Edit

This example shows test questions that were created using the different creation options. The unmarked item was written within the test itself.

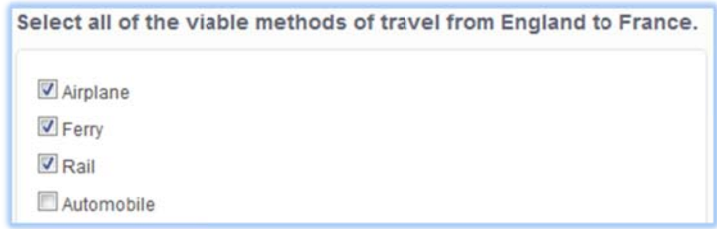
26.1.14 Question Types

True or False questions require 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. Here is how a true or false question would appear to participants:

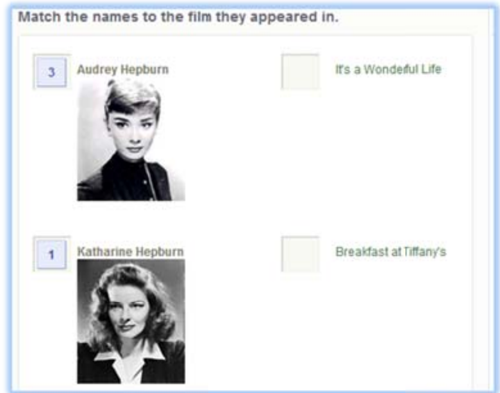
Multiple Choice questions require participants to select one answer from several choices. There is only one correct answer to this type of question. Here is how a multiple choice question would appear to participants:



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:



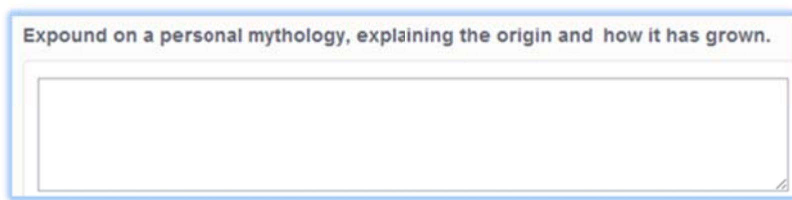
Matching questions require the participant to use a drag and drop technique to correctly match the items on one list with the items on another list. There is only one correct answer to this type of question since all items must be correctly matched. Here is how a matching question would appear to participants; the number on the left must be dragged over to the correct match on the right:



Fill in the Blank questions require a short, correctly spelled (non-case sensitive) answer entry into a blank field. There is only one correct answer to this type of question. Here is how a fill in the blank question would appear to participants:

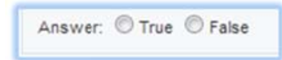
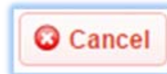
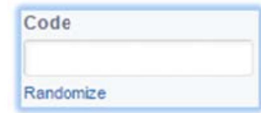
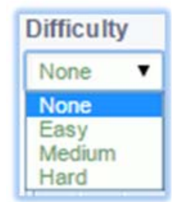
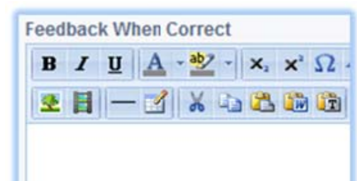
Ranking questions require participants to rank items in the correct order. An answer is only correct if all items are in the proper order. Numbers are dragged from the left column to their appropriate match in the right column. Here is how a ranking question would appear to participants:

Essays 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:



26.1.15 Question Fields

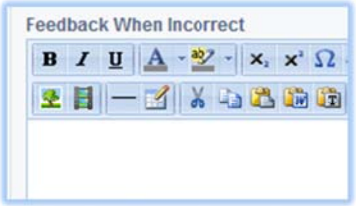
This section describes the various fields you will find during question creation and which questions that are in, listed in alphabetical order.

Actual Order *Found in ranking questions* Use the drop down menu to select the correct rank for the associated distractor text.  	**Add Distractor** *Found in multiple choice, multiple answer, ranking, and matching questions* Select + to increase the choices for users to select as answers up to a maximum of 10.  	**Answer** *Found in true or false questions* Select either true or false as the correct answer for this question. 
Blank Content *Fill in the Blank* The portion of the question that users fill in during the test. “Add Blank” to create more fill ins. Use the delete button to remove a blank field.  	**Cancel** *Found in all question types* This button will return you to the questions page without saving the question.  	**Code** *Found in all question types* Optionally add a unique code to questions (must be enabled in test configuration). Uses can refer to a code which is especially useful with randomized questions. 
Correct *Found in multiple choice and multiple answer questions* Select the distractors that are correct answers for the question.  	**Create** *Found in all question types* Saves the question and returns you to the questions page.  	**Difficulty** *Found in all question types* Optionally choose a difficulty for this question from the drop down menu. 
Display Order *Ranking* These are the numbers users will drag over to rank items in the question.  	**Distractor Text** *Found in multiple choice, multiple answer, and ranking questions* 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.  	**Feedback When Correct** *Found in all question types except essay* Create optional feedback for users that answer correctly (must be enabled in test configuration). 

Feedback When Incorrect

Found in all question types except essay

Create optional feedback for users that answer incorrectly (must be enabled in test configuration).



Match From Order

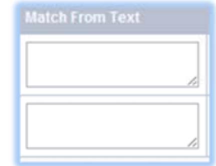
Found in matching questions

This automatically generated number must correlate to the correct Match From Text field.

Match From Text

Found in matching questions

Enter the text that that must be matched to the content in the Match To Text field. It must correlate to the correct Match From Order. You may use simple HTML to insert images.



Match To Order

Found in matching questions

Use the drop down menu to select the number that correctly matches the Match From Text field to create a correctly matched pair.

Match To Text

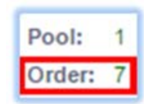
Found in matching questions

Enter the text that that must be matched to the content in the Match From Text field. You may use simple HTML to insert images.

Order

Found in all question types

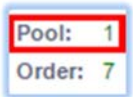
The current order questions are presented to test takers, if not randomized. If randomized, order number indicates where the question is on the edit questions page. Use the reorder tool to change question order.



Pool

Found in all question types

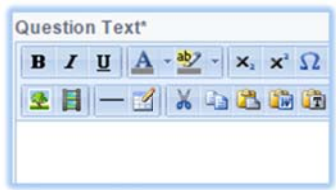
If you have more than one pool for the question, this number indicates which pool the question belongs to (1 by default).



Question Text

Found in all question types except fill in the blank

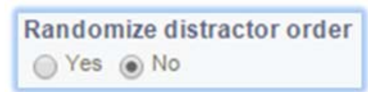
Create the question content using text and supporting files.



Randomize Distractor Order

Found in all question types except esaay and fill in the blank.

Select “yes” if you want to randomize the order in which participants will see the answers.



Save & Create Another

Found in all question types

Saves the question and starts the creation of another new question of the same type.

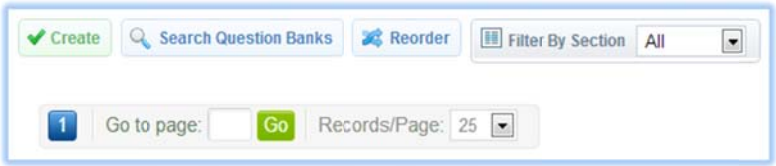
Text Content

Fill in the Blank

The portion of the question that the participant sees. Select “Add Text” to include more than one visible element to the question. Use the delete button to remove a text field.

26.1.16 Create Questions Directly in Test

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.

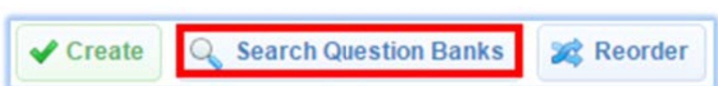
3. Select the **Section** that will house the question.
4. Questions are automatically assigned a default order number as you create them. You can override the default by using the **Order** drop down menu to select a new number and add a question before or after one you have already created. You can also reorder the questions from the Questions Menu later.
5. Select **Continue** to start creating the question content.

26.1.17 Create Static Questions from Question Banks

This feature is available to Site Managers and assigned Campus Admins and Publishers depending on system configuration.

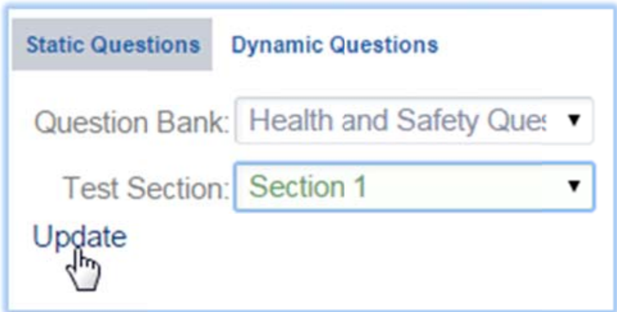
You can create a Prova test using questions from a question bank. Creating static questions means that you select specific questions from the bank. The questions can be presented in random order, but every participant will see the same questions. *For instructions on creating question banks and the questions within them, please see the Question Banks chapter of this manual.*

1. Select **Search Question Banks**. Return to questions at any time by selecting **Questions** from the Prova test menu.

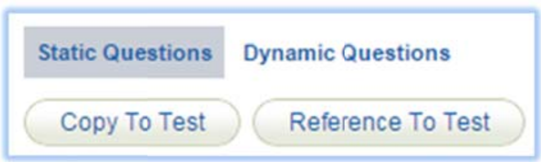


2. Select Static Questions.

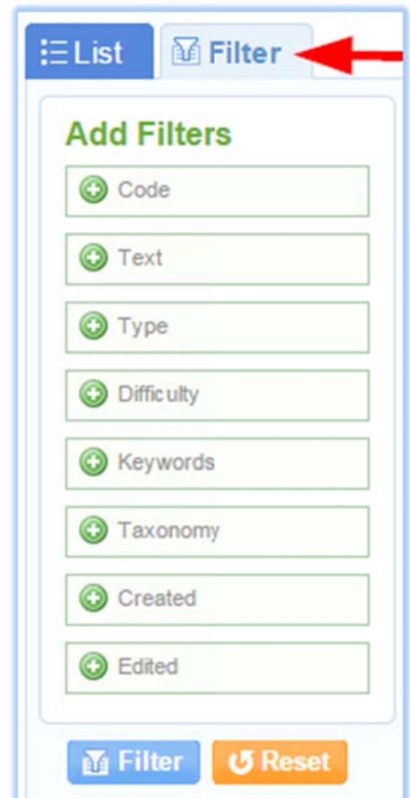
3. Select a **Question Bank** from the drop down menu.
4. Select a **Test Section** from the drop down menu. The questions you select will be added to the selected section.



5. Select **Update**.
6. Select questions from the list of presented questions (highlight by clicking or tapping). You can opt to use all of the questions from the bank in your test, or you can narrow the questions by using the filter.
7. Choose **Copy to Test** or **Reference to Test**.



8. Select **Update**.



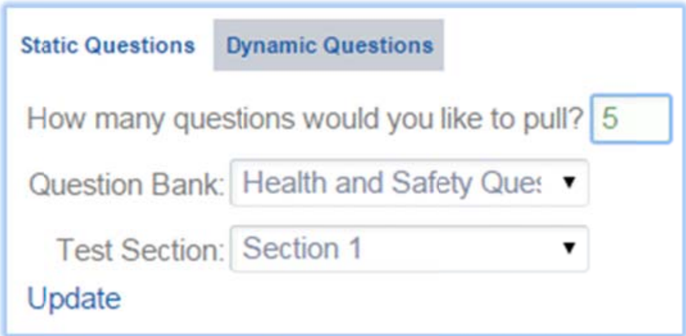
Copy to Test VS Reference to Test

Copy isolates questions from the bank. Copied questions are not updated when there are updates to the question from the question bank.

Reference points to the questions in the bank. Referenced questions are updated when there are updates to the question from the question bank.

26.1.18 Create Dynamic Questions from Question Banks

Creating dynamic questions lets you select a subset of questions from a bank and then randomly display a defined number of questions from the subset to test takers. Test takers may not have the same questions presented in the test across multiple takes or displayed to other test takers.



What about Duplicate Questions?

Informetica prevents a test taker from getting duplicates as the test pulls dynamic questions.

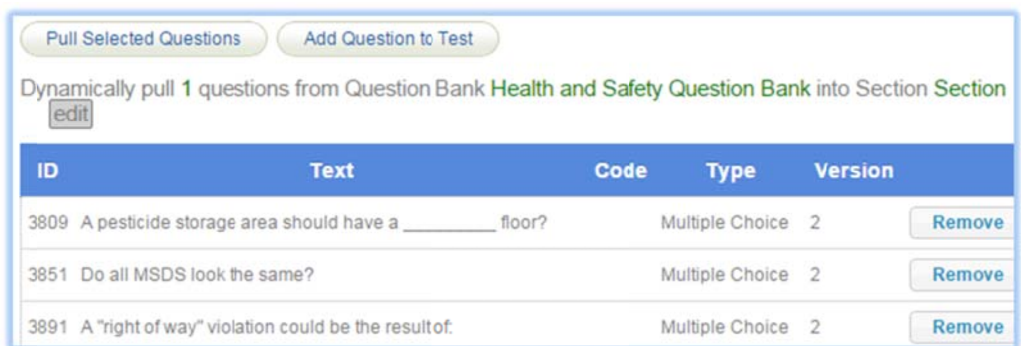
When pulling dynamic questions, you will be notified of conflicts and cannot publish the test until conflicts are resolved.

1. Enter the number of questions you want to pull from the bank.
2. Select a **Question Bank** from the drop down menu.
3. Select a **Test Section** from the drop down menu. The questions you select will be added to the selected section.
4. Select **Update**.
5. Select **Add Question Bank Questions** or **Add Question Bank Query.**

A. Add Question Bank Questions

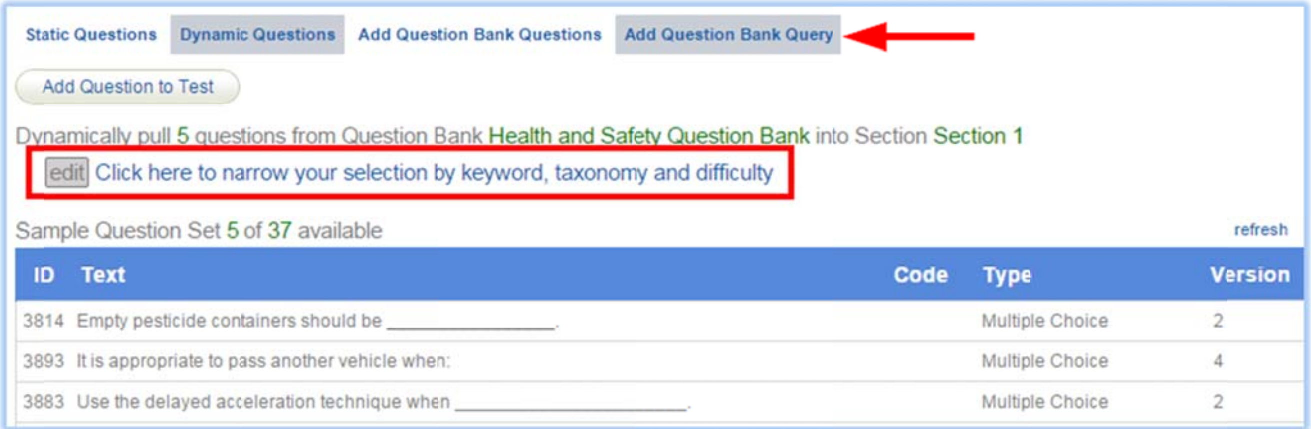
Manually select a subset of bank questions. From this subset, the number of questions you entered to pull from the bank will be randomly displayed to test takers.

1. Select questions from the list of presented questions (highlight by clicking or tapping).
2. Select **Pull Selected Questions**. You can review the questions you selected and decide to remove them before adding them to the test.
3. Select **Add Question to Test**. Any of the questions listed in your review will be added to the test section.

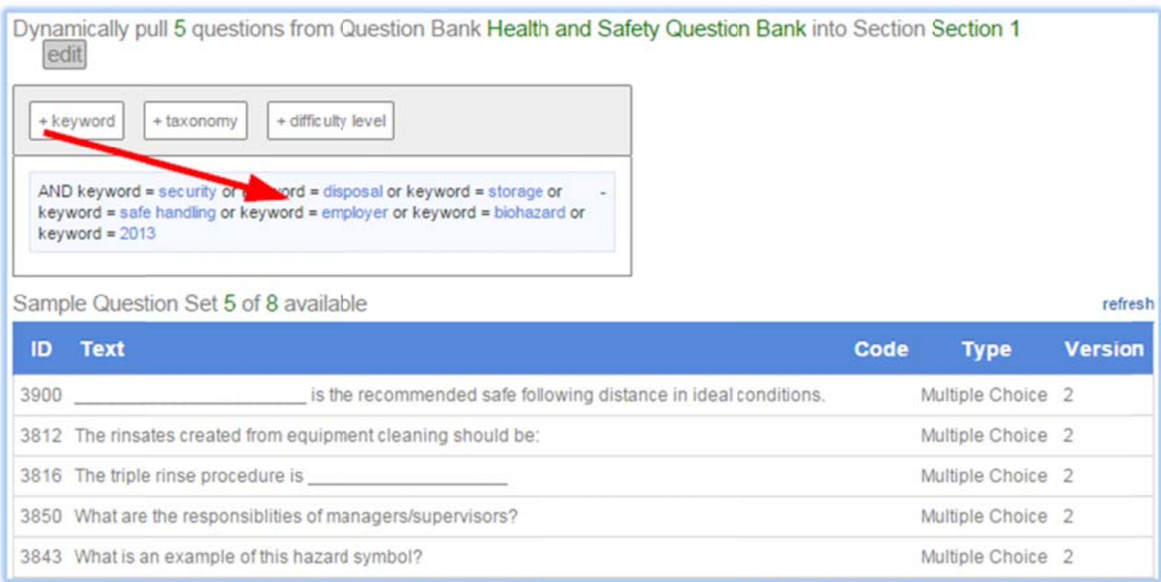


B. Add Question Bank Query

Query a subset of questions from the bank without selecting specific questions. You can narrow your selection by keyword, taxonomy, and difficulty. From this subset, the number of questions you entered to pull from the bank will be randomly displayed to test takers.

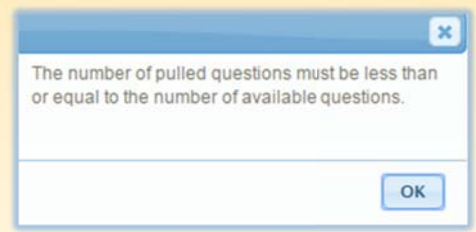


1. Select **Add Question Bank Query**.
2. Optionally narrow the results by selecting **click here to narrow your selection by keyword, taxonomy and difficulty** and then select one or more filters. This example shows a sampling of questions with one of several keywords.



Query Match

The available questions must satisfy the number of query questions pulled. For this example, it means that there must be 5 or more available questions. If not, then you will be warned when you **Add Question to Text**.



3. Select **refresh** to preview different questions available in your subset.
4. If you are happy with the results, select **Add Question to Test**.

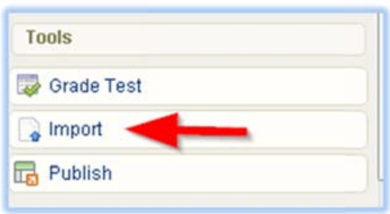
5. You can repeat new queries as needed to add more questions to your test.

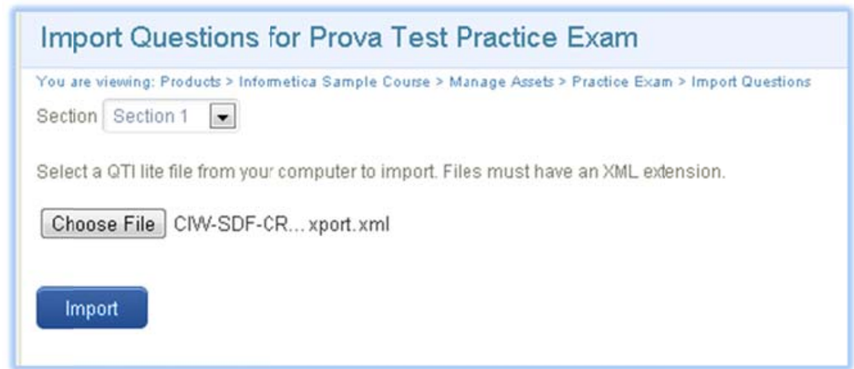
26.1.19 Import Questions

Available to Site Managers, Campus Admins, and Publishers depending on system configuration.

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**.

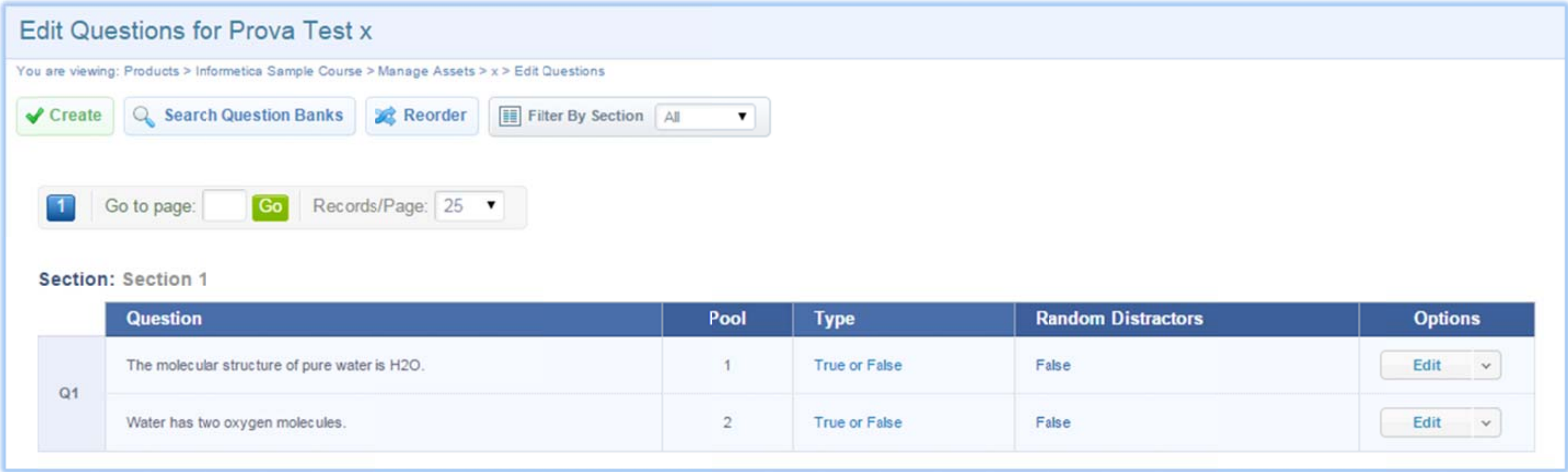
This can take a few minutes to upload, depending on the number of questions. We recommend that you use a wired connection during the upload to reduce any connection issues. Modern browsers should display the upload progress. You can use QTI to preserve the following type of data for your multiple choice questions:

- Multiple choice questions
- Feedback
- Question codes
- Randomize distractors

What is QTI?

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.

26.1.20 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.

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.

One Automatic Pool

Questions automatically have one pool. If you have only the one question pool, then all participants will see the same question.

Add a Pool to an Existing Question

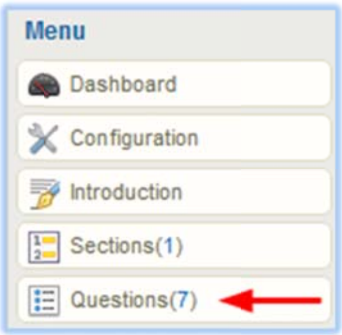
To add pools to an existing question:

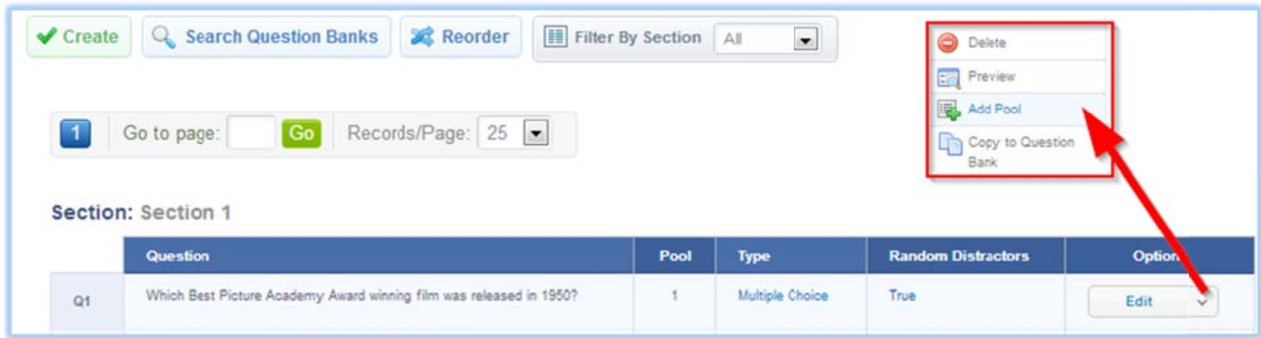
- Navigate to **Questions**

New Question

This option also lets you create a different question within the pool.

- Select the **down arrow** on the edit button for the relevant question
- Select **Add Pool**

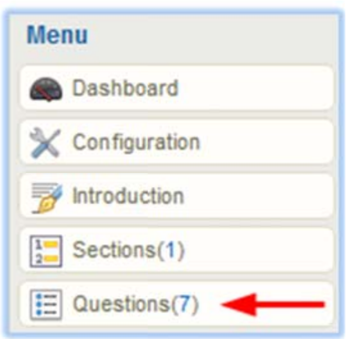




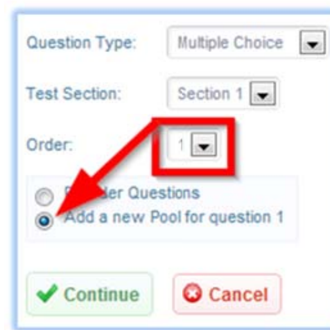
Add a New Question as a Pool to an Existing Question

While creating a new question, you can opt to add it as a pool to an existing question.

1. Navigate to **Questions** and then **create** a new question



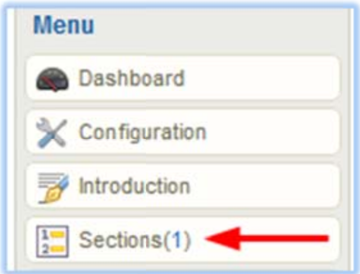
2. Select the **Question Type**
3. Change the **order** number to match the destination question
4. Select **add a new pool for question #**



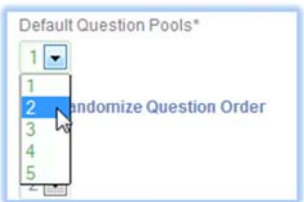
Create a Number of Default Pools

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:

1. Navigate to **Sections**



2. **Create** or **edit** a section
3. Select a number of pools (1-5) under **Default Question Pools**.



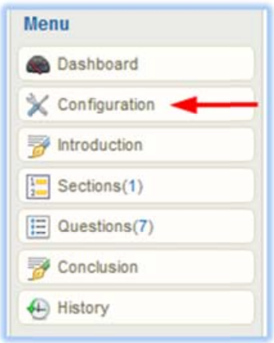
Pools Have the Same Question Type by Default

To create another question type, see Add a New Question as a Pool to an Existing Question.

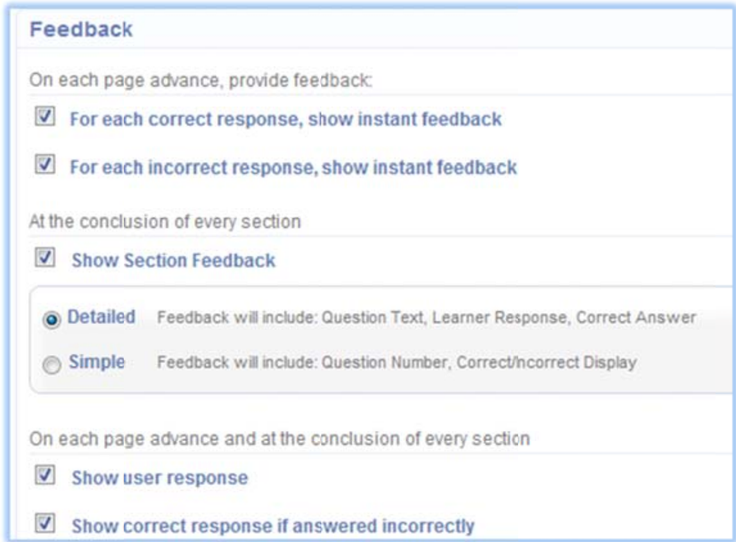
26.1.21 Feedback

Feedback is an option that allows you to give simple or customized feedback to 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. For more details on feedback configuration, see the Configuration Options section of this chapter.

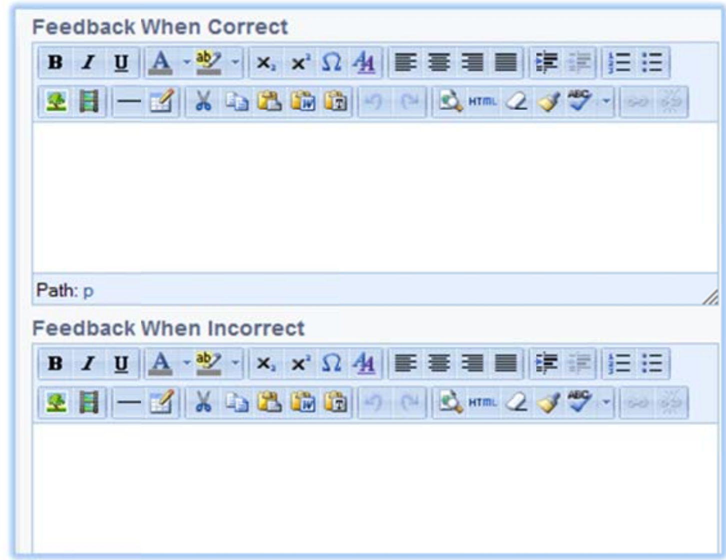
1. Open the test and then click the **configuration** option from the menu.



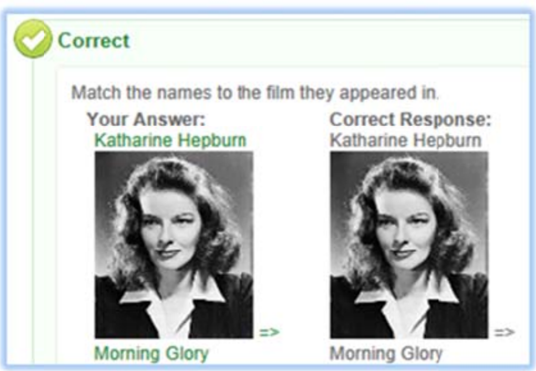
2. Scroll down to **feedback** and ensure that feedback options are enabled for the test.



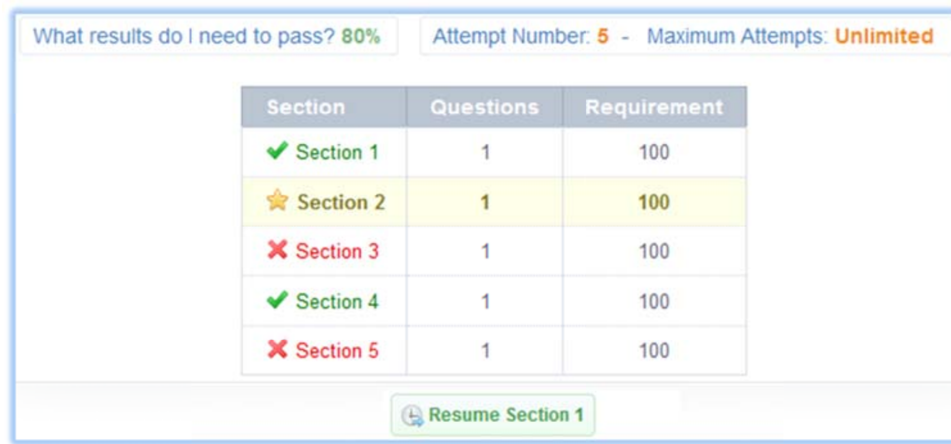
3. Open the question and use content editors to design feedback using text and supporting files, if desired.



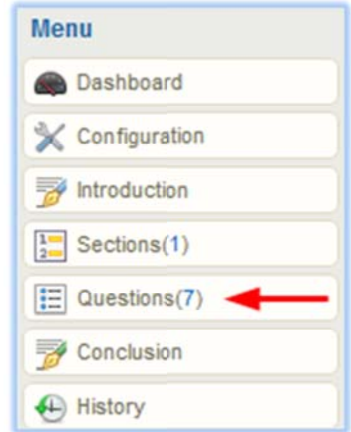
Example of feedback after correctly answering a matching question. The configuration enabled for this is "For each correct response, show instant feedback."



Example of a feedback summary after completing a test section. The configuration enabled for this is "Show Section Feedback: Detailed." The star indicates the section the user is about to launch.

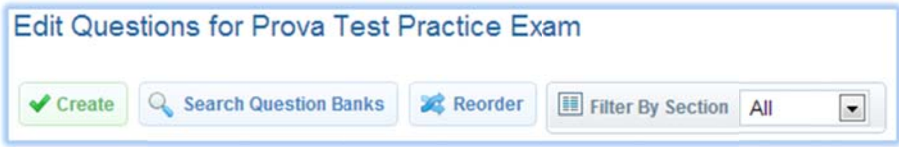


26.1.22 Question and Answer Order

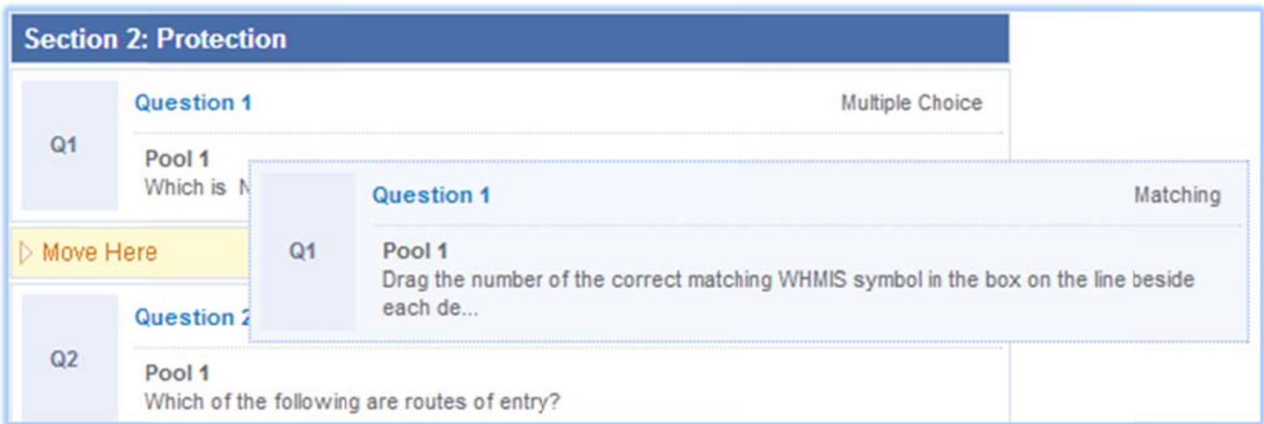


Reorder Questions

1. Select **Questions** from the menu.
2. Select Reorder at the top of the page.



3. Drag the question to move it and drop it into a new spot within the list or to a different section.



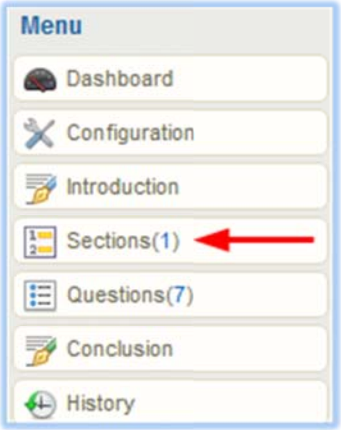
4. **Save Order** when done.

Randomize Questions

Test questions are presented during a test in a default order by question number. You can instead opt to have the questions presented randomly. If you have created multiple pools, randomized questions will still only present on one of the pools at random during the test.

1. Select **sections** from the options menu.
2. Select **Edit**.

3. Click the box to insert a check mark in front of **Randomize Question Order**. To unrandomize questions, uncheck the box.



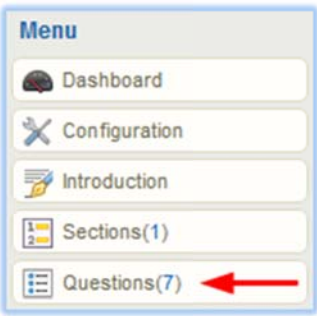
Randomizing Affects the Entire Section

Opting to randomize questions will affect all questions within that section.

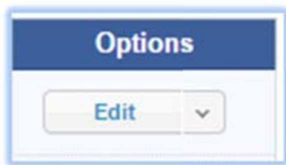
Randomize Answers

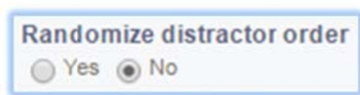
You can choose to randomize the order in which participants will see the answers (distractors).

1. Select **Questions** option from the menu.



2. Select Edit next to the appropriate question. Move down the page to **Randomize Distractor Order**, select **Yes** next to randomize distractor order, and then **Update**. To unrandomize, select **No.**





Not so Random

Note that answer order cannot be randomized for fill in the blank or essay questions.

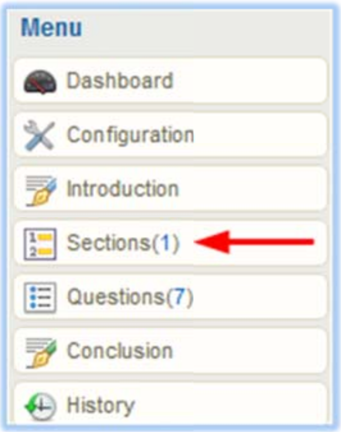
26.1.23 Distractors

Distractors are the possible answers for a question, including the correct answer presented to users during tests. This section covers the labeling options and how to add images to your distractors.

Labels

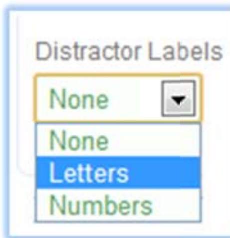
Distractor labels are applied to all eligible questions within a section. Essay and fill in the blank questions do not have distractor labels.

1. Select **Sections** from the menu.



2. Select **Edit**.

3. Use the drop down menu to add or remove alpha or numeric distractor labels to the answer options.



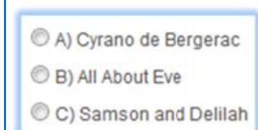
Example of a multiple choice question using different distractor labels:

No Label

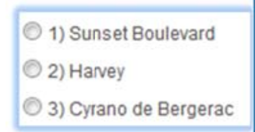
Decimal Alphabetic

Decimal Numeric

Bracketed Alphabetic



Bracketed Numeric



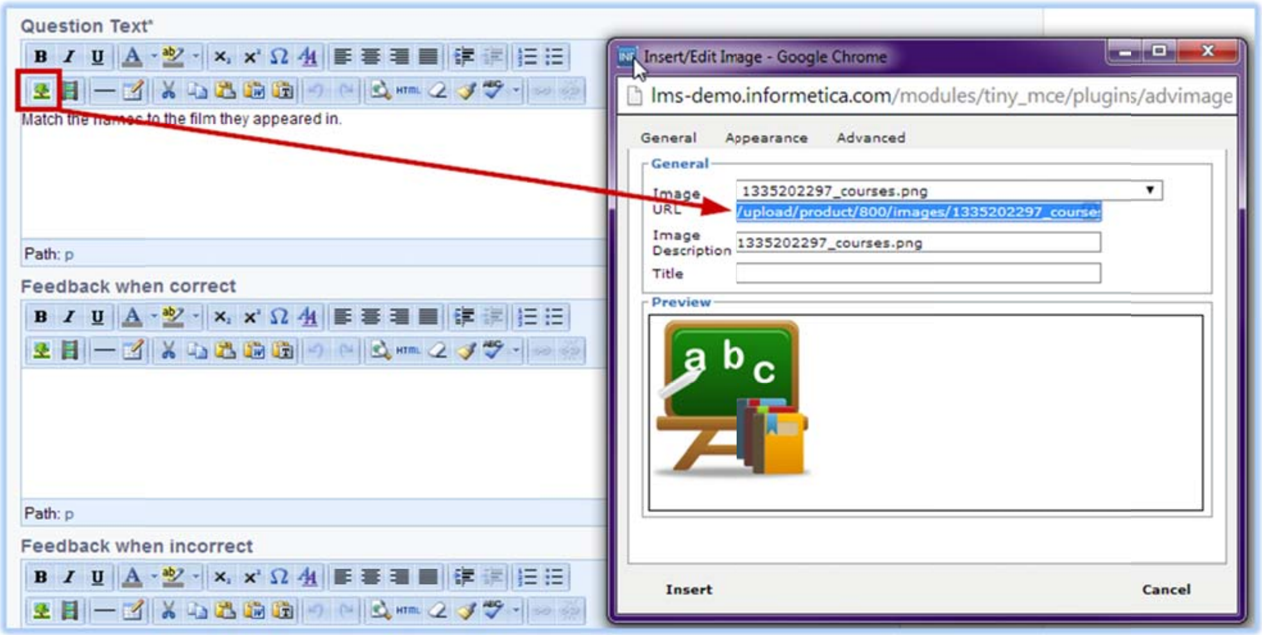
Add Images to Distractors

You can use some simple HTML code to add images to your question distractors. Below are two scenarios.

A. HML Code for Images uploaded to your course library

**Biohazard Symbol
**

- The **blue bolded** text is the distractor answer. Use <br /> if you want to make the image appear on its own line, not next to the text.
- The yellow highlight between the quotations is the link to the image that is uploaded to your product's media library. To find the link, use the image insert button in the question's content window and copy the URL image link from the pop up window. You can just cancel the insert if you don't want to use the image in your question text.



- The height in grey highlight is completely optional. Height can be used to ensure that all images used in the distractors are the same size so they all look uniform. Increase or decrease the number to make the image larger or smaller according to your preference.

B. HTML Code for images hosted external to the LMS

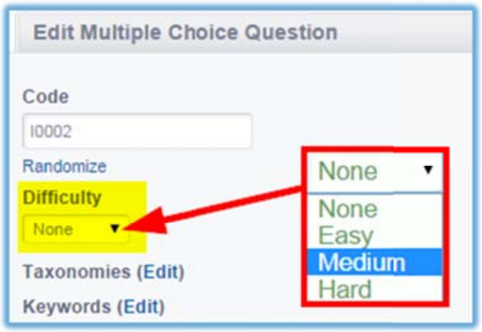
**Audrey Hepburn
**

- The **blue bolded** text is the distractor answer. Use <br /> if you want to make the image appear on its own line, not next to the text.
- The yellow highlight between the quotations is the URL link to the image where it is hosted online.
- The height in grey highlight is completely optional. Height can be used to ensure that all images used in the distractors are the same size so they all look uniform. Increase or decrease the number to make the image larger or smaller according to your preference.

26.1.24 Apply Difficulties

This feature is available to Site Managers and assigned Campus Admins and Publishers depending on system configuration.

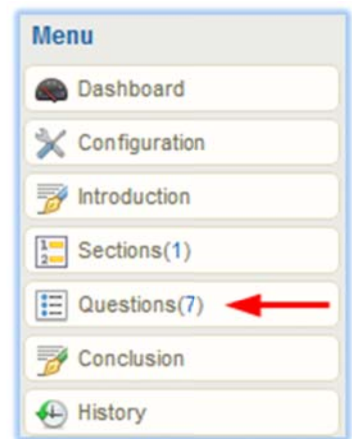
When creating or editing a question, use the difficulty drop down menu to select a difficulty and then **Save.** Note that you can also apply a difficulty during question creation.

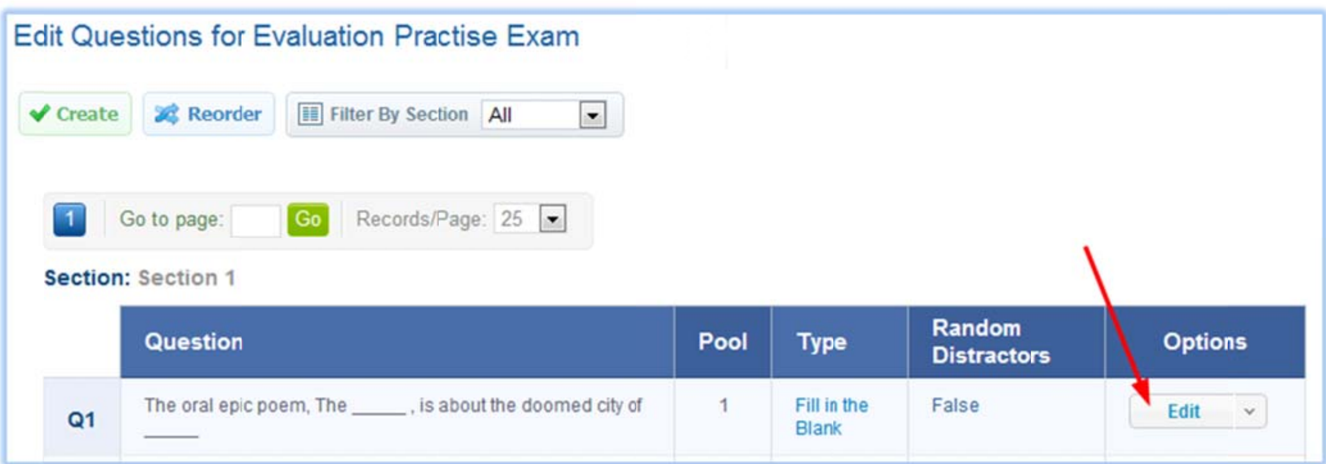


26.1.25 Edit and Delete Questions

Edit

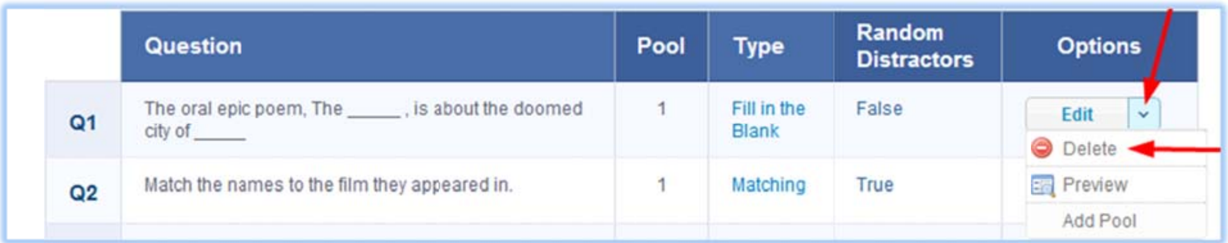
Open the test that contains the question you wish to edit, and then click the **questions** option from the menu to open the edit questions page. Click the **edit** button next to the appropriate question, make your changes, and then click the **update** button.

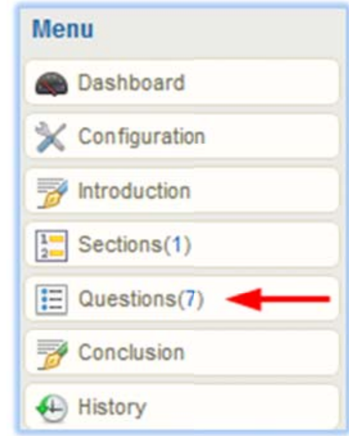




Delete Questions

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.

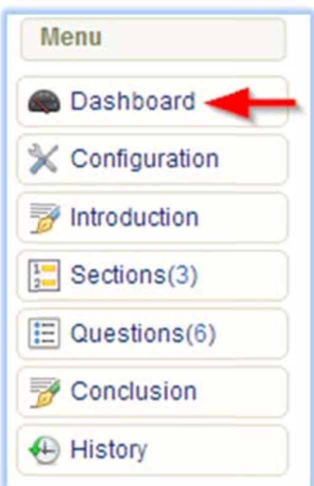


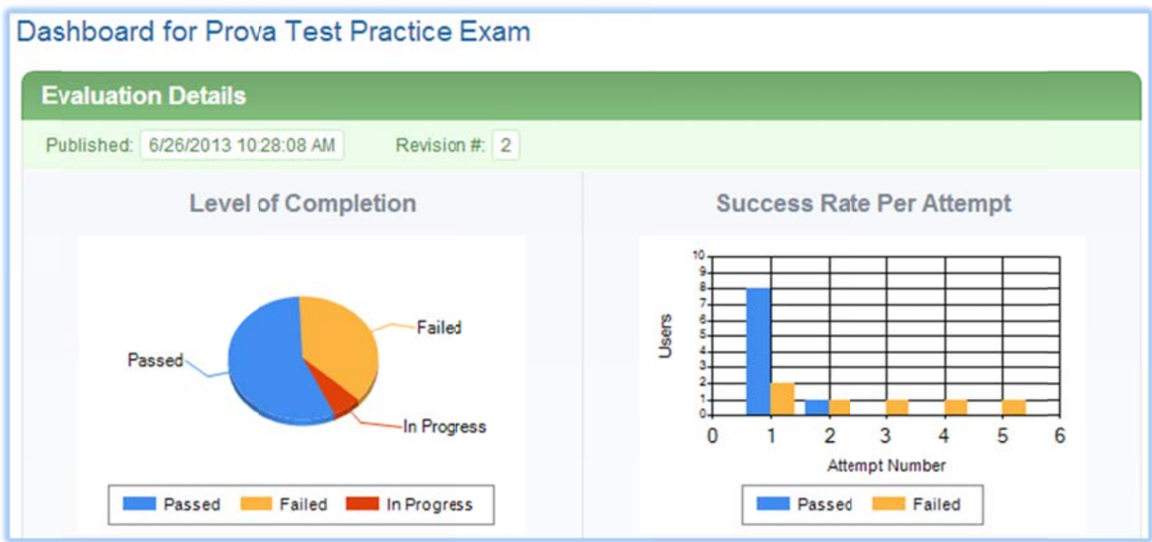


Dashboard

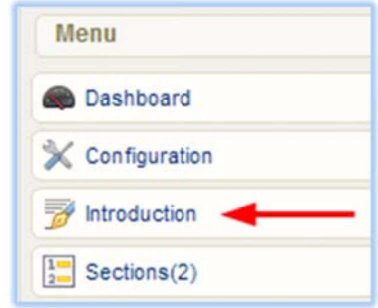
Available to Campus Admins, and Publishers depending on system configuration.

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.





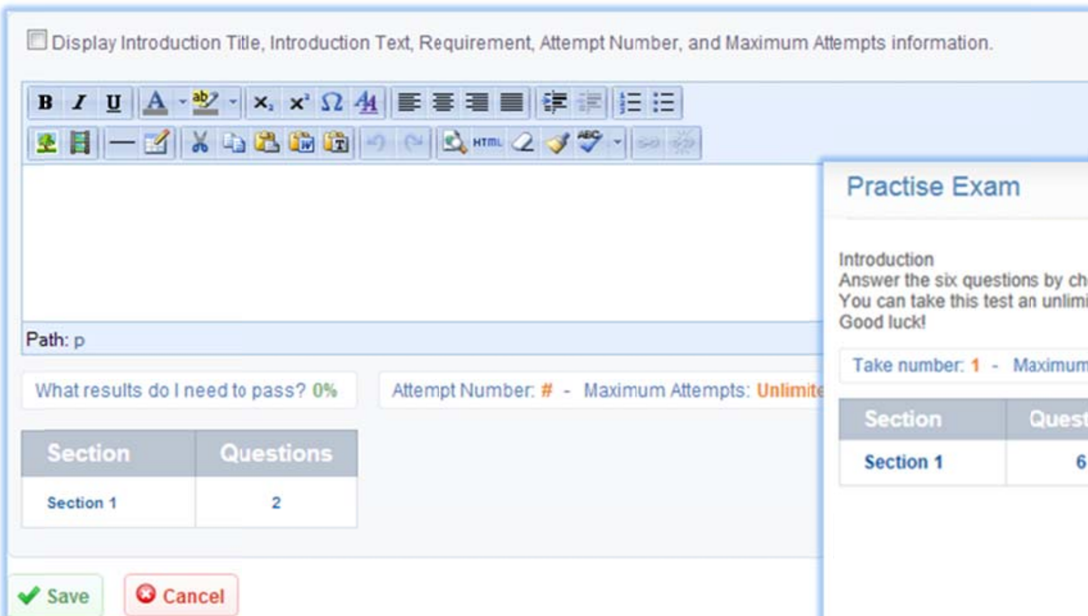
Introduction Page

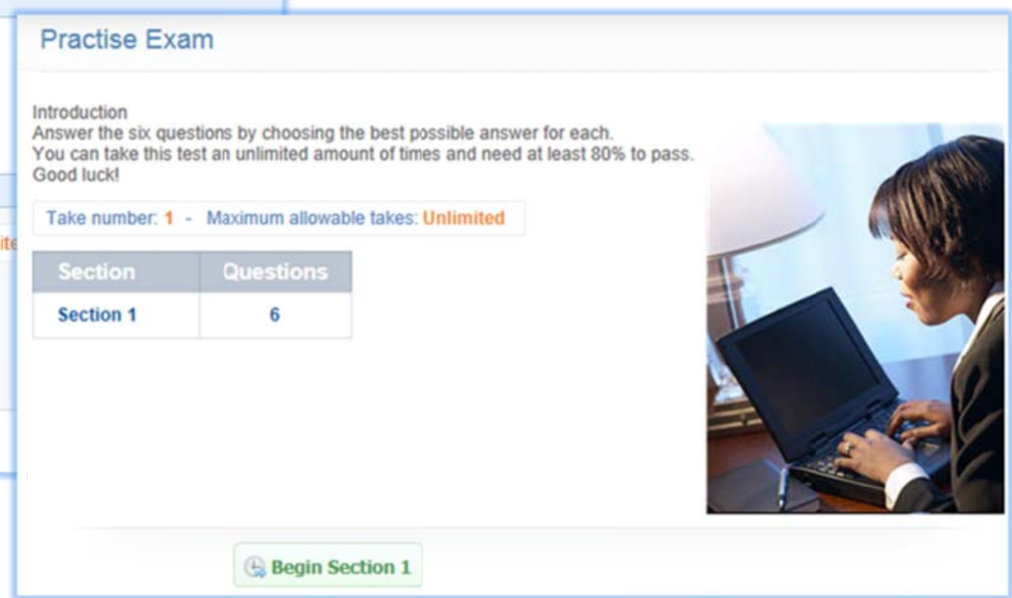


If the test is configured to show an introduction, then an introduction page will be displayed to participants after the identity confirmation screen (if enabled) and before the test questions. The default introduction screen will show which take number the participant is on, how many attempts they are 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 select Edit.

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.

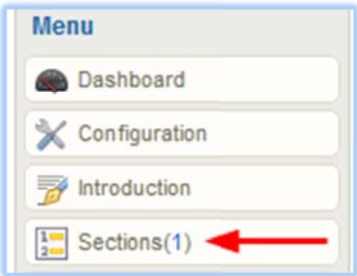


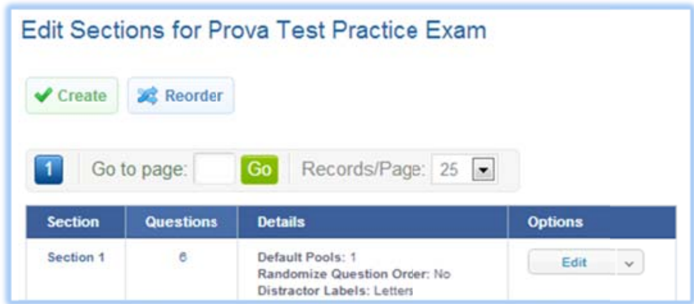


Here is an example of a custom introduction as it appears to participants.

Sections

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.





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

Select **Reorder** to change the order sections are presented to participants, for tests that are configured for test by individual section.

Questions indicates how many questions are in the section. Click the number to view the questions themselves.

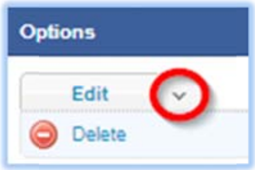
Details:

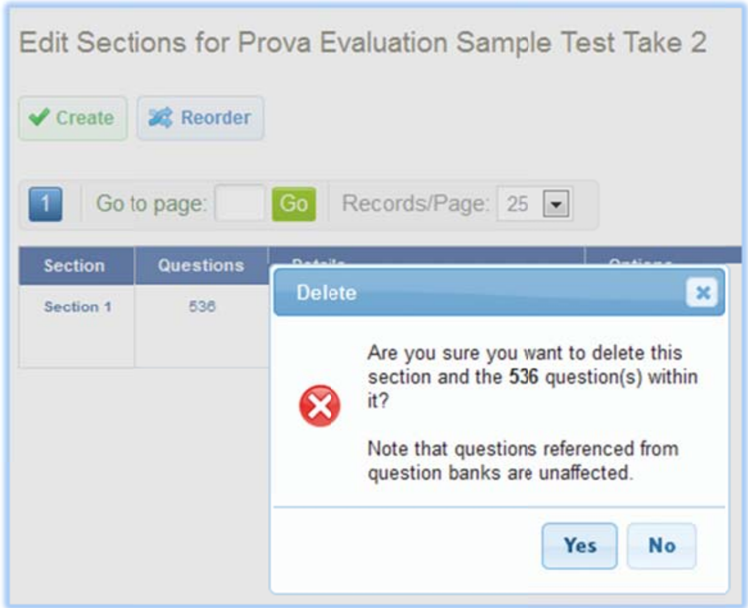
- **Default Pools** shows how many pools were set up for this section
- **Randomize Question Order** indicates whether or not the questions are randomized
- **Distractor Labels** shows which type of labels are being used in front of the answer options.

Select **Options** to edit or delete the section.

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.





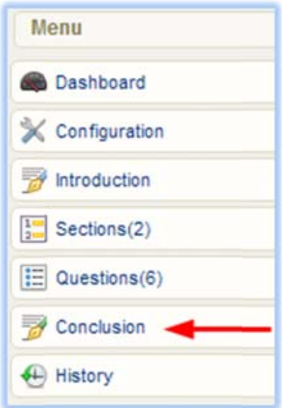
Delete a Section and the Questions Within

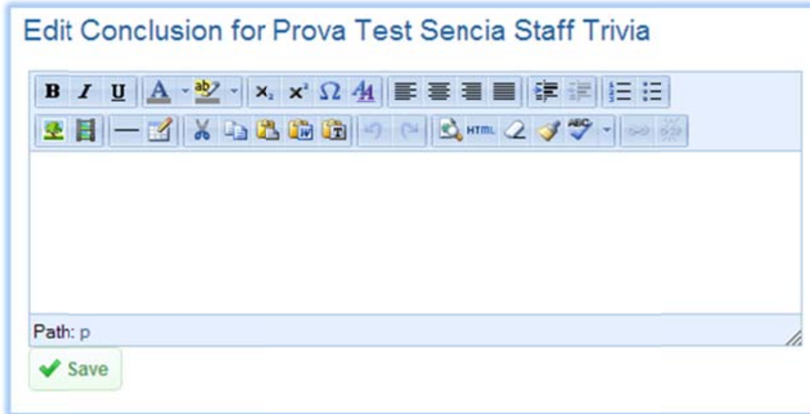
Deleting a section will also permanently delete questions within the section, unless the questions are populated from question banks or added to a bank before deleting the section.

When deleting sections with a large amount of questions, a progress bar displays below the create and reorder buttons.

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.

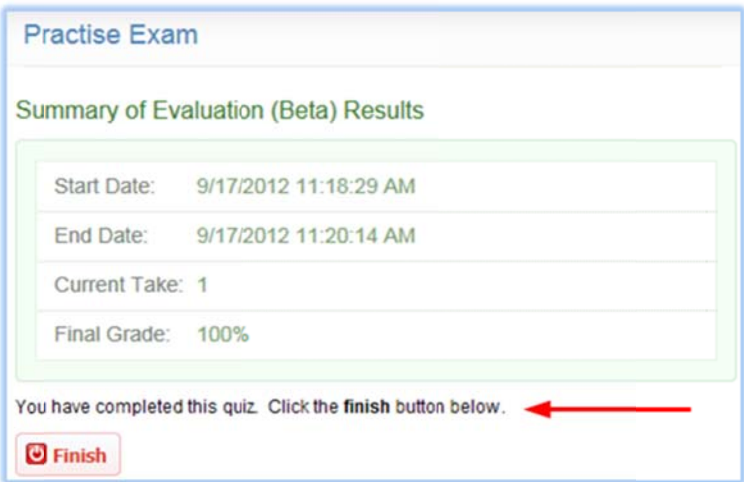




What Should I Write in the Conclusion?

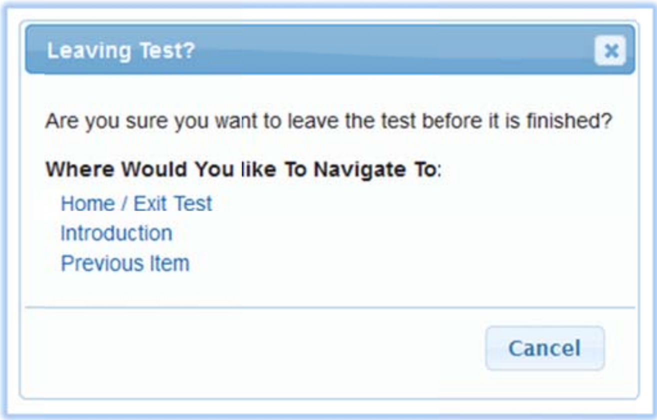
This is a great place to let your participants know what their next steps should be after completing the test.

This example shows how a participant sees the conclusion. The summary is default content and the indicated text at the bottom is custom content.

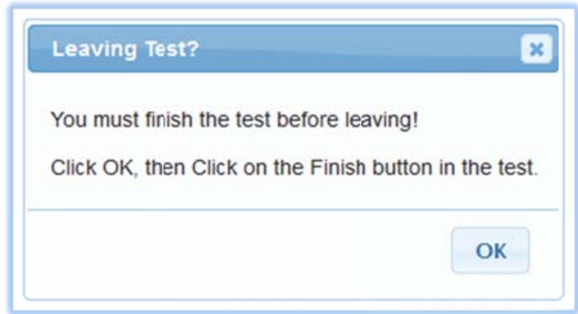


Exit Navigation

When a user attempts to exit a test before completing it, a pop up alert will ask them where they wish to navigate to. The example below shows all navigation possibilities, however, the options available are based on course and test configurations as well the participant's permission to access other assets. For example, if your course does not use the Introduction page, the option would not be available for navigation. The Home/Exit test option will always be available and users can opt to close the pop up if they wish to stay in the test.



Navigation possibilities



Users Must Submit after Reviewing

Tests configured to use "Show Section Feedback" will allow users to review their answers before submitting them. This update has added a pop up alert so that users cannot exit the test without completing this review and submitting their final answers.

Preview Test

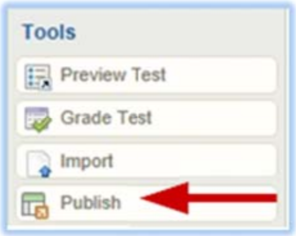
Available to Campus Admins and Publishers depending on system configuration.

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 **Preview Test** from the tools menu. This will let you attempt the test without worrying about the system retaining any records for the attempt. *We expect to add the launch button for Site Managers in future development.*

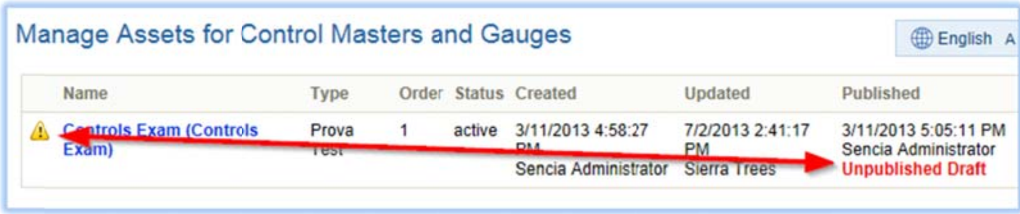
Publish

Available to Site Managers, Campus Admins, and Publishers depending on system configuration.

Tests and revisions must be published before they are available to participants. To publish, open the test and then select **Publish** from the tools menu. Each publish is retained so you can determine which version participants took.



Tests with unpublished drafts are indicated on the manage assets page with an exclamation mark and text.



Dashboard View for Campus Admins and Publishers

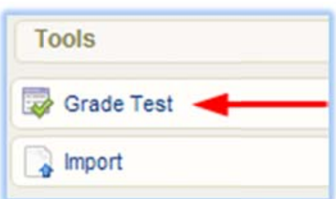
The Publish option will be in colour and available if there are pending revisions.

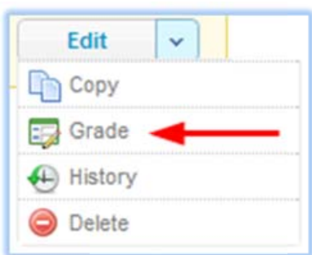
The Publish option will be greyed out and unavailable if there are no pending revisions.

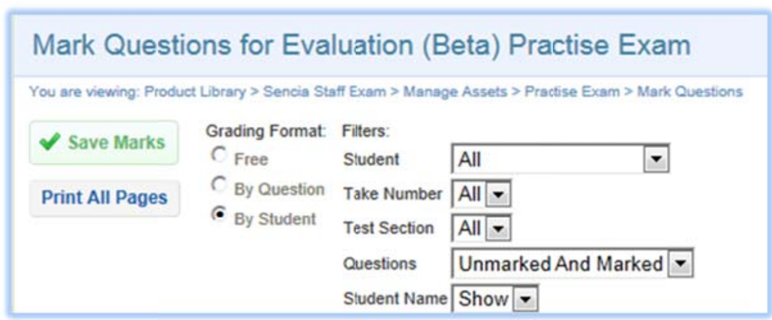
Manual Grading

Available to Site Managers, Campus Admins, Publishers, and Instructors depending on system configuration.

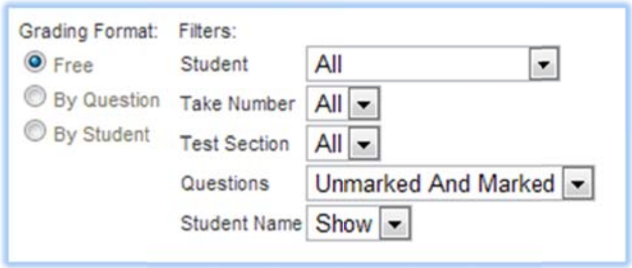
This option is used to grade essay questions (essay questions cannot be automatically graded by the system). Open the Prova Test, and then click the **grade test** button from the tools menu. Alternatively, you can click the arrow next to a question's edit button to reveal the **grade** button. This will open the "Mark Questions" page for the selected test. You have three grading formats to choose from: Free, By Question, and By Student.



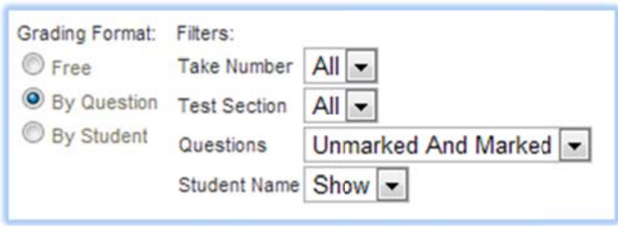




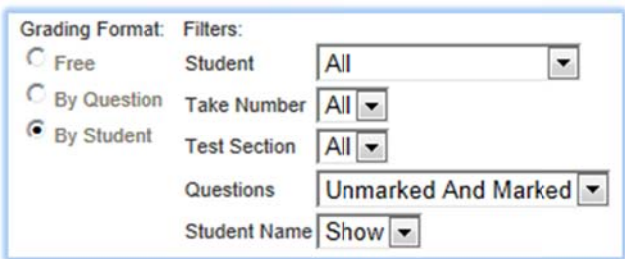
1. **Free** is solely based on the filters and has no navigation once those items are filtered. This method is best used when you have very specific criteria to filter and expect only that specific result. Enter a grade in the **mark** field and then click **update mark**.



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**.



27. Question Banks, Difficulties, Keywords, and Taxonomies

This feature is available to Site Managers and assigned Campus Admins and Publishers.

Topics Covered In This Chapter

QUESTION BANKS

QUESTION DIFFICULTIES

KEYWORDS

TAXONOMIES

Tips for Assigning Users to Question Banks, Keyword Groups, and Taxonomies

Add:

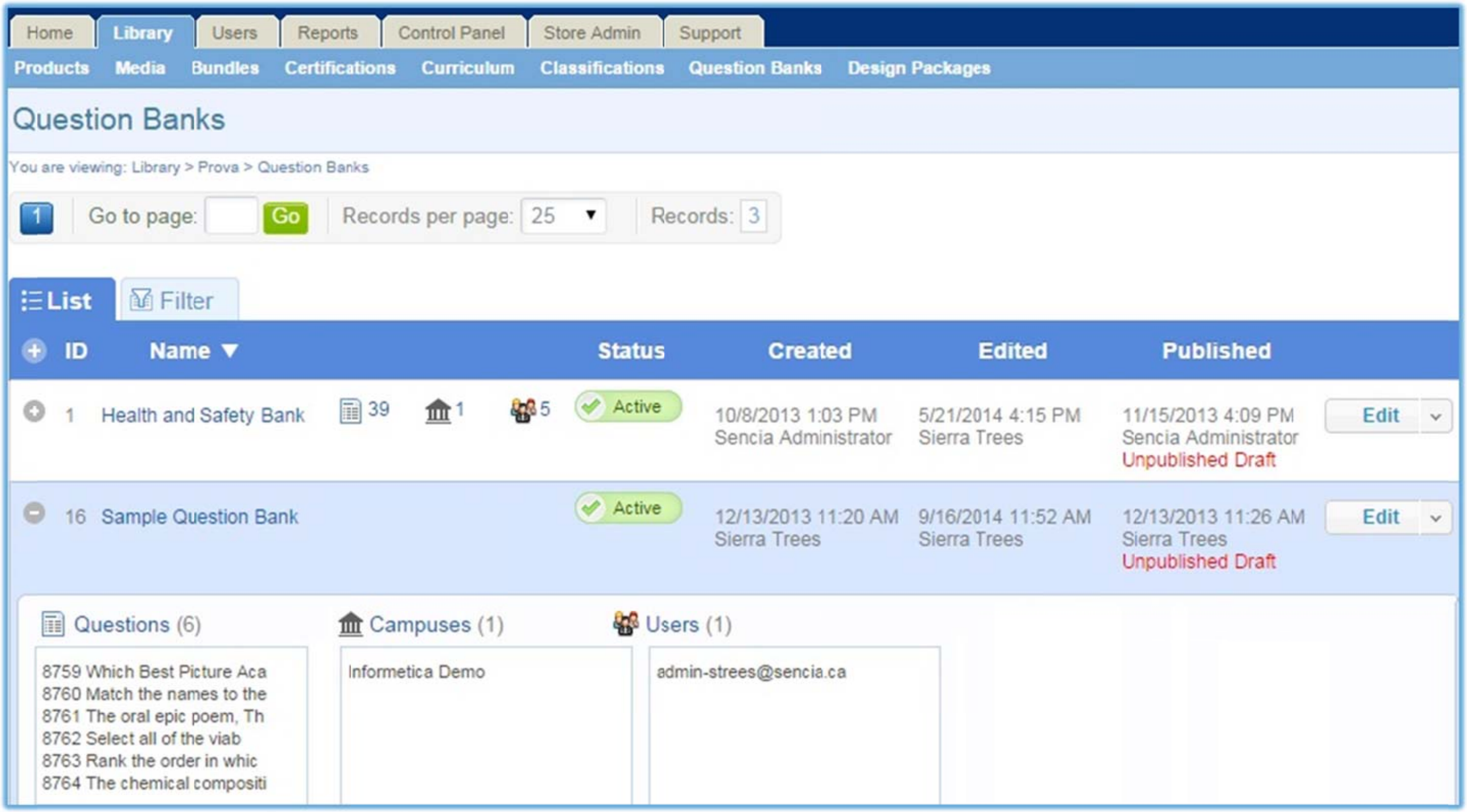
- Campus Admins and Publishers who are authorized to manage all content within question banks, keyword groups, and taxonomies

Don't Add:

- Site Managers - they can already manage question banks, keyword groups, and taxonomies
- Question bank, keyword group, and taxonomy creators - they are automatically assigned
- Campus Admins and Publishers who need to use question banks, keyword groups, and taxonomies to build tests; they just need to belong to the same campus.

Question Banks

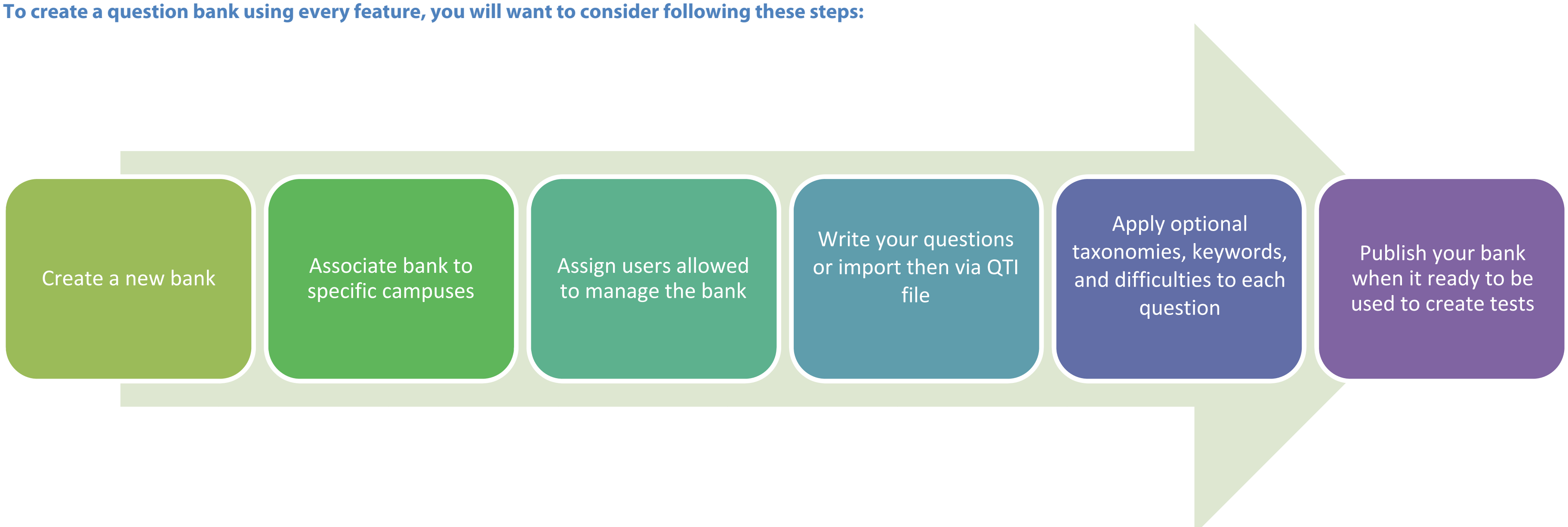
Questions created in banks can be shared among Prova tests and are searchable, so you can find specific questions when building a test. You can reference questions in the bank or create copies of the questions. **Referenced questions** can be updated in the bank and all tests referencing the questions will be automatically updated. **Copied questions** can be updated only at the test level. To access Question Banks, select the Library tab and then select Question Banks.



Description of the fields

Field	Description
ID	Informetica automatically assigns a unique ID to each question bank.
Name	The name of the question bank.
Questions	The number of questions in the bank. Expand to see a static list of the questions.
Campuses	The number of campuses assigned to the bank. Assign a campus to allow course authors (e.g. publishers) belonging to that campus to pull questions from the bank when creating a Prova test. Expand to view the campuses.
Users	Indicates the number of users that have rights to manage the question bank. You can give specific users access to question banks by adding them as a user. Expand to view the usernames.
Status	Toggle to make the bank active or inactive. Inactive banks are not available to pull questions from when creating or editing a Prova test. Tests that already reference the question bank are unaffected.
Created/EditedPublished	The date, time, and person who created, edited, and published the bank. Unpublished drafts are also indicated here.
Edit	Change the name and status of the bank, create, import, copy, and delete questions, and publish the bank.

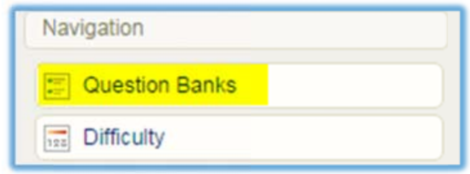
To create a question bank using every feature, you will want to consider following these steps:



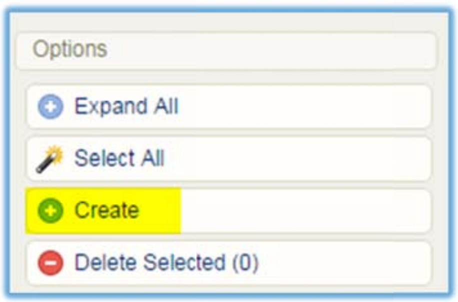
Create New Question Bank

This feature is available to Site Managers.

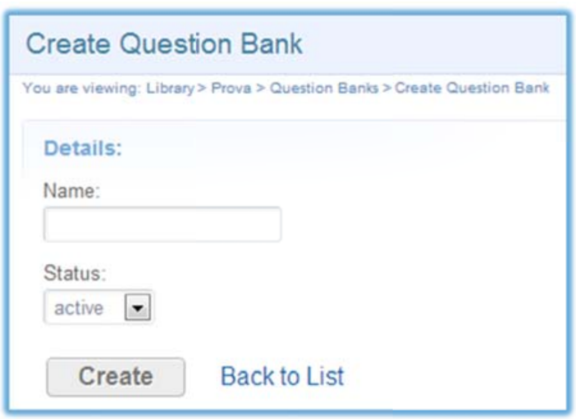
1. Select **Question Banks** from the library tab.
   If you navigate away, you can select **Question Banks** from the navigation menu to return.



2. Select **create** from the Options menu.



3. Enter the **name** of the new question bank, set the **status** to active or inactive, and then select **Create**.



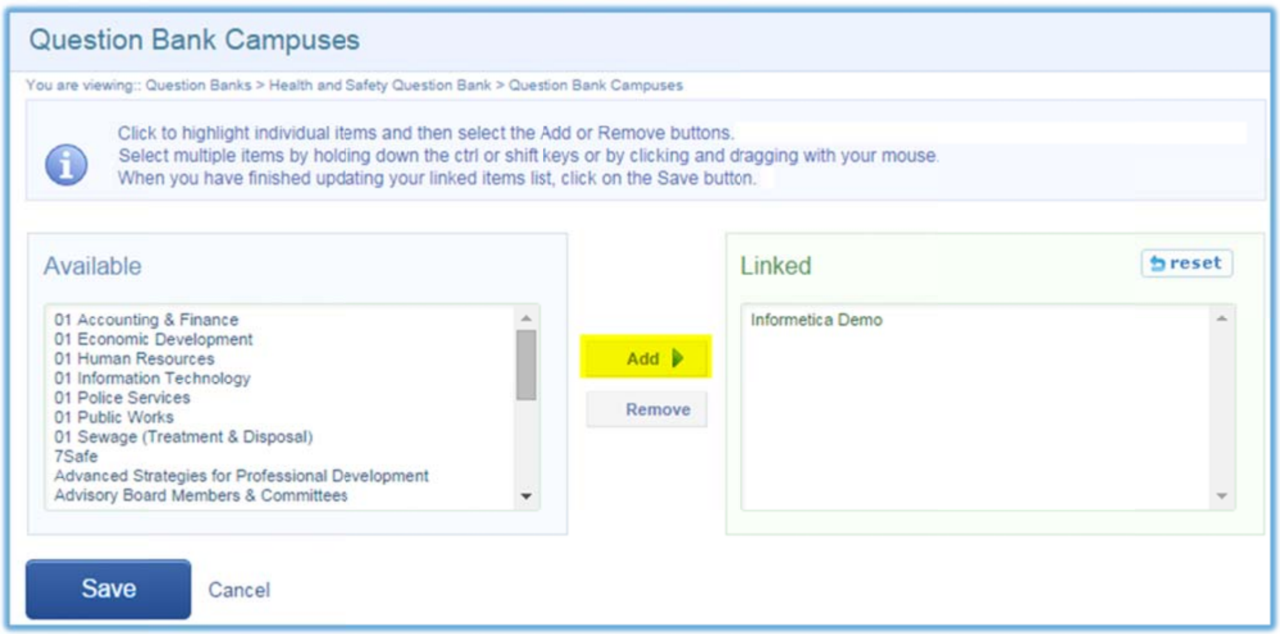
Associate Campuses

This feature is available to Site Managers and assigned Campus Admins and Publishers.

Associating a campus to a bank allows course authors (e.g. campus admins, publishers) belonging to that campus to pull questions from the bank to create a Prova test. Expand the bank to view the names of campuses already associated.

1. Navigate to question banks.
2. Select the **campuses** icon or expand the bank and select **Campuses**.

3. Add one or more selected campuses from the available list, and then **Save**.



Campus Admins & Publishers

Campus Admins and Publishers in associated campuses may pull questions from a question bank. However, they must be assigned users to add questions to the bank.

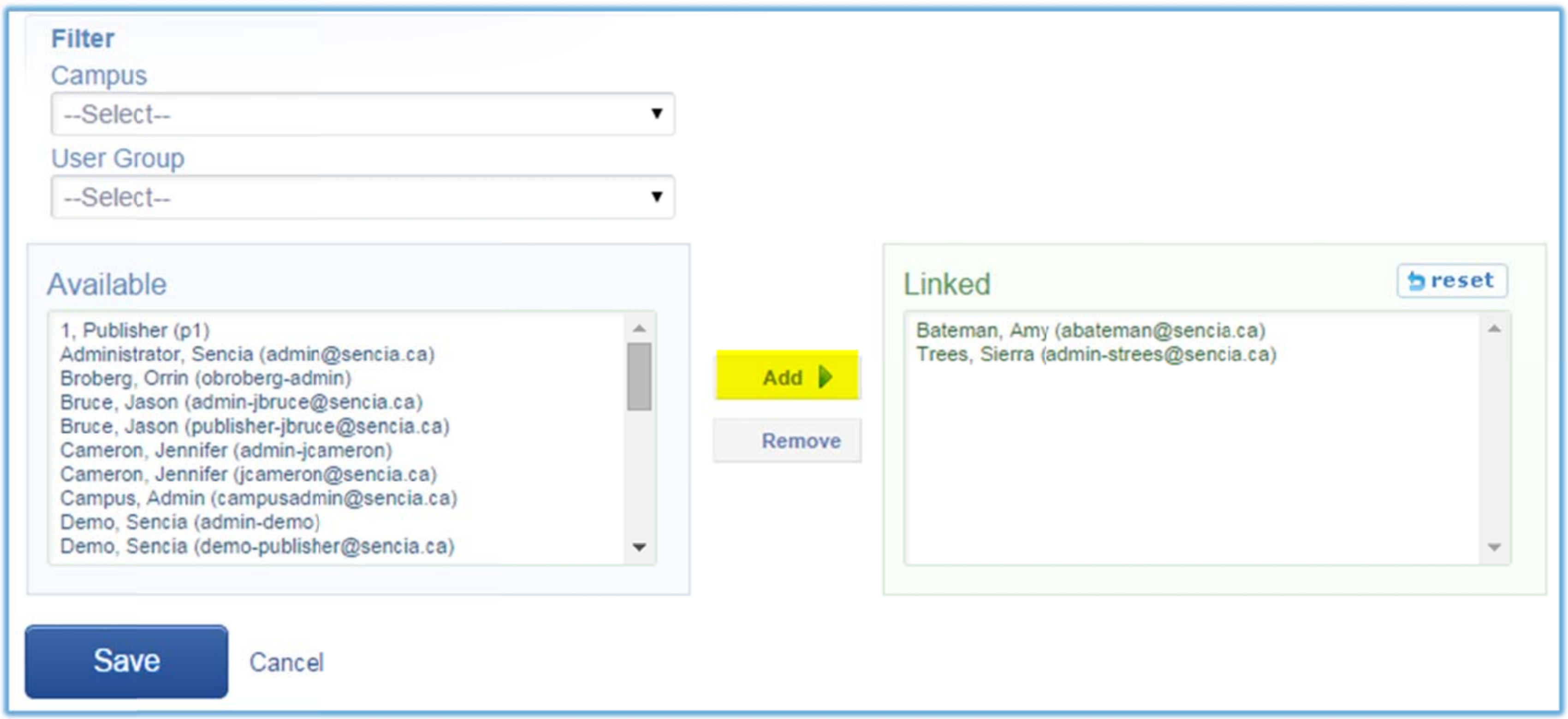
Assign Users

This feature is available to Site Managers and assigned Campus Admins and Publishers.

You can assign specific campus admins and publishers to a bank, allowing them to: create new questions, assign users, import questions, publish, copy, and delete bank, change status, add or remove campus associations, and edit questions and content (including difficulty, keywords, taxonomies, status, delete and copy). They can add questions created within a Prova test or create questions directly in the bank.

1. Navigate to question banks.
2. Select the **users** icon or expand the bank and select **Users**.

3. Add selected users from the available list, and then Save. You can filter by campus and user group to help find specific users.

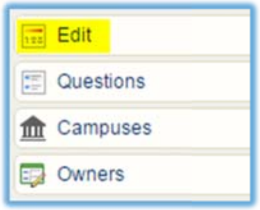


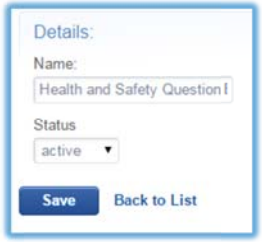
Question Banks Navigation and Tools Menu

Open any question bank to access the navigation and tools menu for that bank.

<u>Edit</u>

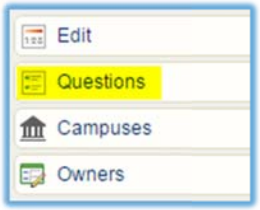
Allows you to change the name and status of the bank.

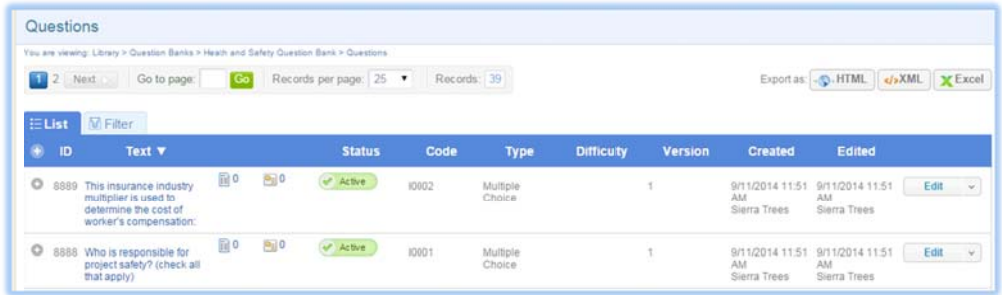




<u>Questions</u>

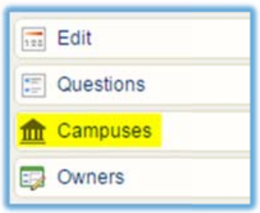
View or edit the questions within the bank.

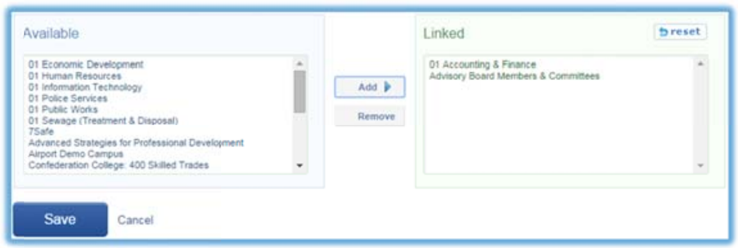




<u>Campuses</u>

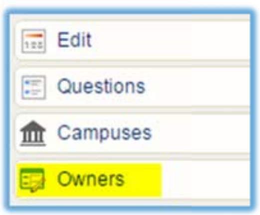
Add or edit the campuses assigned to the bank.

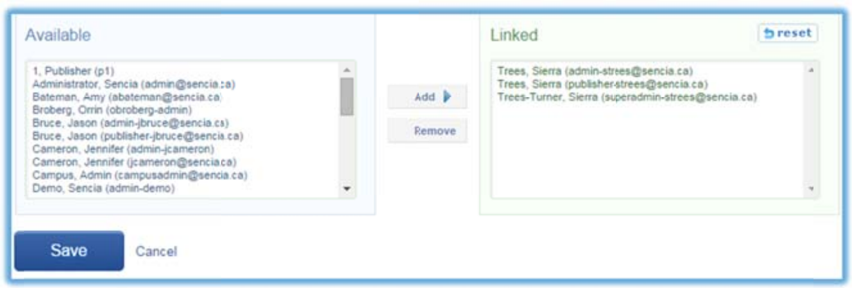




<u>Owners</u>

Add or edit the users assigned to the bank.



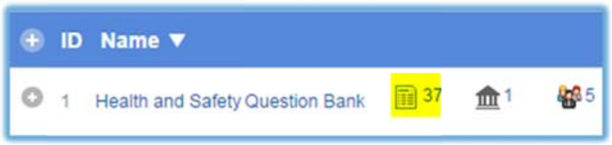


Add and Edit Questions

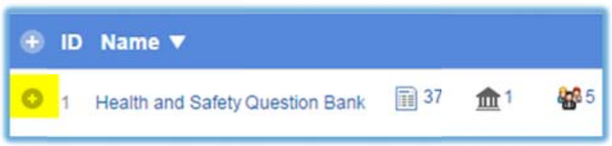
This feature is available to Site Managers and assigned Campus Admins and Publishers.

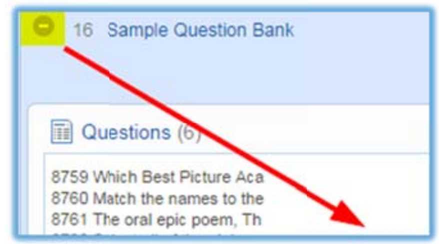
Add Questions

Once a bank is created, it can house questions. There are three methods for adding questions, which are described below. To see how many questions are in a bank refer to the questions icon. In this example, there are 37 questions.



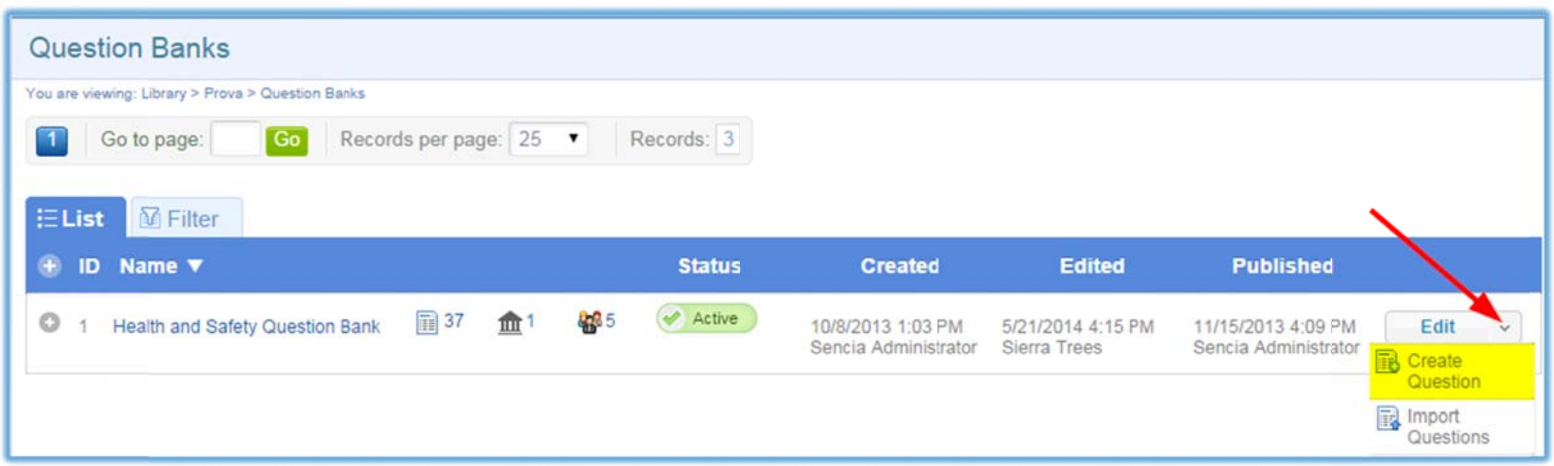
To view a summary of questions in the bank, expand the bank and review under **Questions**.



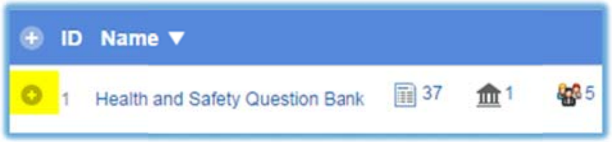


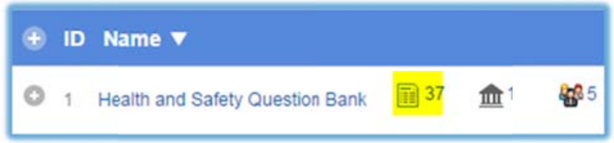
Option 1: Create Questions From Within the Bank

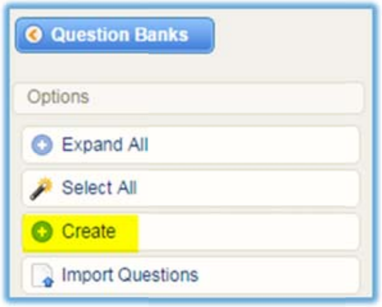
1. Select the down arrow on the edit button to reveal the menu, and then select **Create Question**.



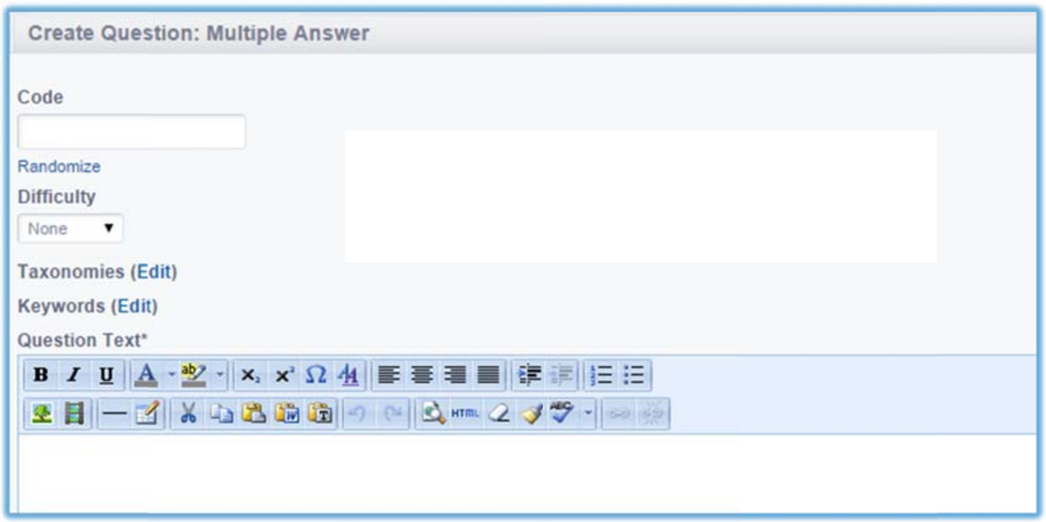
Alternatively, select the **questions** icon or expand the bank and select **Questions**, and then Create from the options menu.







2. Choose a **Question Type** and then **Continue**.
3. Create the question and then select **Create** to save the question or select **Save & Create Another** to create more questions for this bank. Details on assigning difficulty, keywords, and taxonomy terms are covered later in this chapter.)

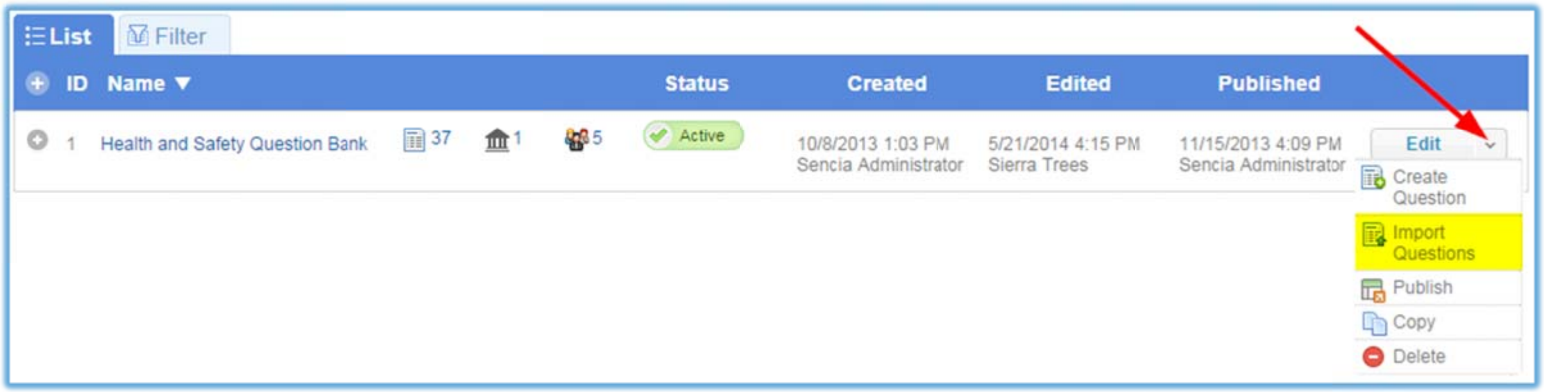


Option 2: Import Questions to a Bank

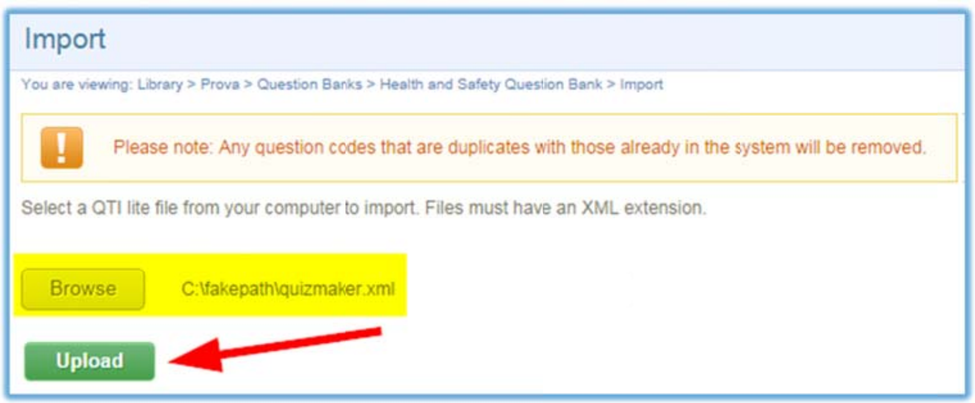
You can import questions to a question bank using a QTI file format. There are many course authoring and test building systems that allow for export to QTI. Multiple choice questions that were built using Informetica's original testing engine (classic evaluations) can be exported to QTI format and then imported into a question bank. See the Prova tests chapter of this manual for details.

> **What is QTI?**
>
> QTI is an industry standard that uses XML to store question and answer data in a format that can be imported into learning management systems.

1. On the edit button of the bank you wish to add questions to, select the down arrow to reveal the menu, and then select **Import Questions**.

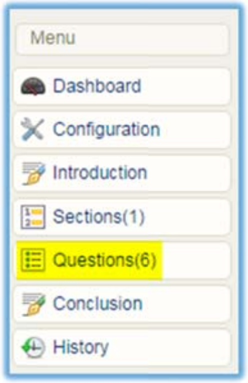


2. Select **Browse** to find the QTI file you wish to add to the bank, and then select **Upload** to import the questions to the bank. Note that the QTI file must have an XML extension.

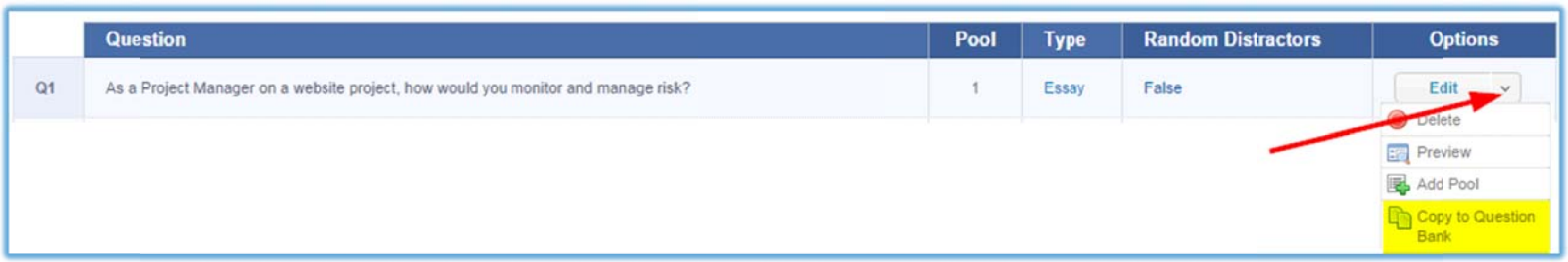


Option 3: Add Questions to Bank From a Prova Test

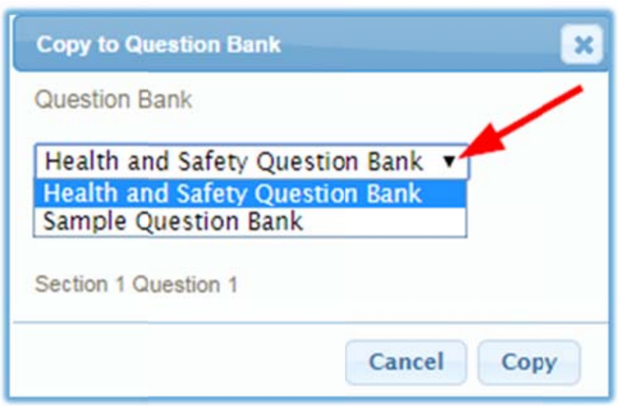
1. Open the Prova test and select **Questions** from the menu.



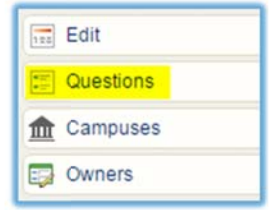
2. For the question you want to add, select the down arrow on the edit button to reveal the menu, and then select **Copy Question to Bank**.



3. Select an available bank from the drop down bar and then select **Copy.**



Edit Questions



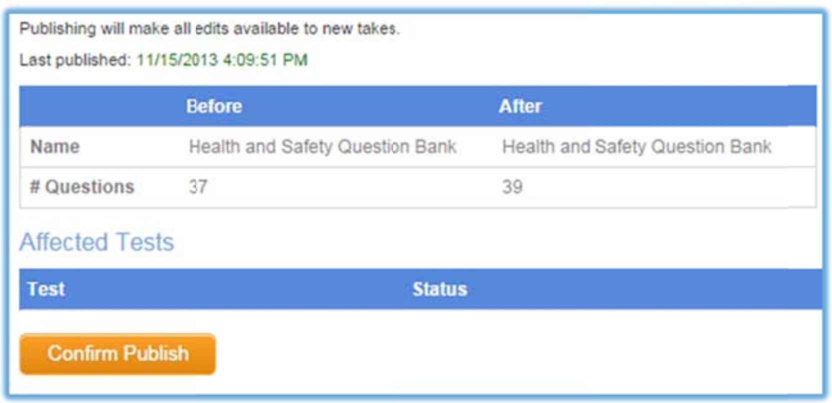
1. Open the question bank and then select Question from the navigation menu.
2. Select **Edit** next to the question you need to edit.
3. Makes any changes to the question.
4. Select **Update** to save the changes.
5. **Publish** the bank so that your changes will be reflected in any tests using the edited questions.

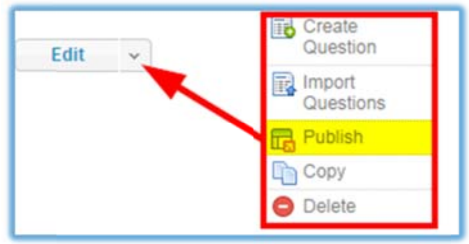
Publish

Since any changes to a question bank have the potential of affecting tests that use it, you must publish your bank before the any changes are available, such as being able to add new questions to a Prova test.

For example, if you pulled 50 questions for a test from a question bank, but then later removed several questions from the bank, you would no longer have 50 questions available to pull from to create the test. If a question bank hasn't been published, a test that uses it will use the last published version of the bank and not the bank being currently edited.

1. Choose a bank, and then select the arrow on the **Edit** button next to the appropriate question.
2. Select **Publish**.
   Review the changes and then **Confirm Publish**.

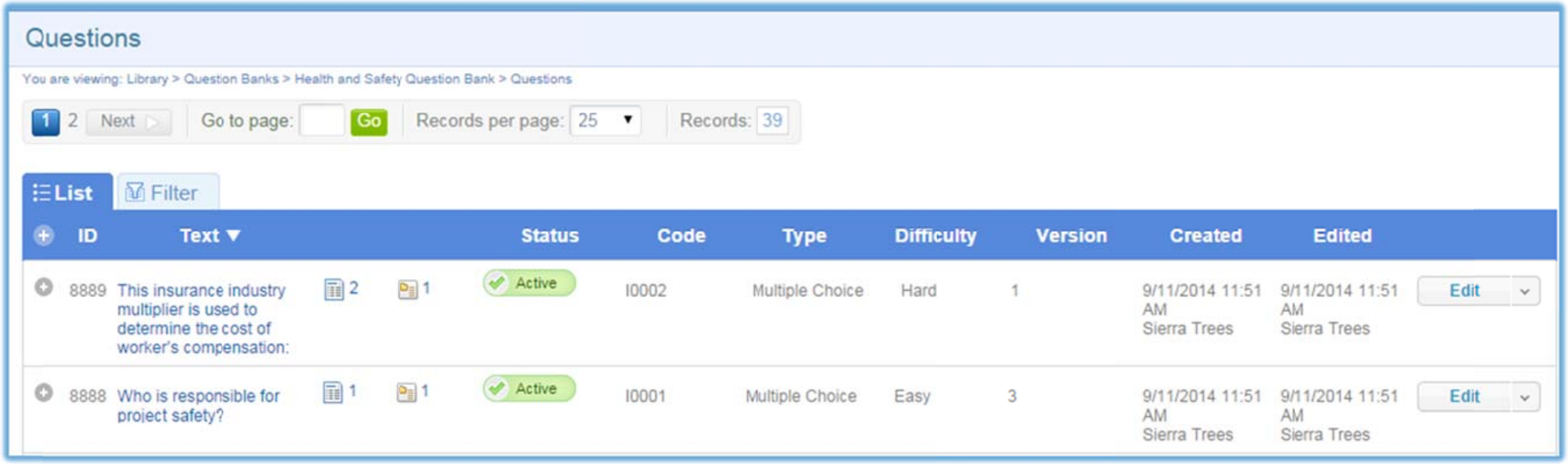




Most Recent Publish

When you create or edit a test using a question bank, you will only get questions from the most recent publish of a bank.

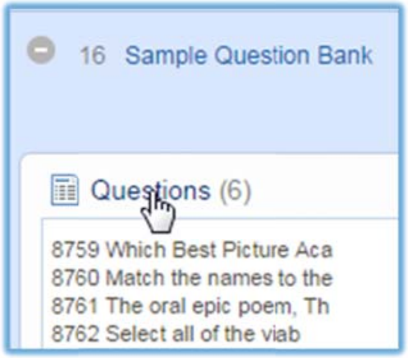
View and Edit Questions



Description of the fields

Field	Description
ID	Informetica automatically assigns a unique ID to each question bank.
Text	The wording of the question.
Keywords	The number of keywords in the question is tagged with. Expand to see a list of the keywords.
Taxonomies	Expand to see the taxomony path where this question is located.
Status	Inactive questions are not available when creating/editing Prova tests. Tests that reference inactive questions are unaffected until the bank is published. Publishing will warn of any tests that will be affected by inactive questions.
Code	Show the optional question code, if in use.
Type	The type of question: essay, fill in the blank, matching, multiple answer, multiple choice, ranking or true or false.
Difficulty	The question difficulty: Very hard, hard, medium, easy, or very easy.
Version	Indicates the current published version of the question.
Created/Edited	The date, time, and name of the person who created or edited the question. .
Edit	Change the question content, difficulty, taxonomy, and keywords, as well as copy or delete the question.

1. From within a selected bank, select the **questions** icon or expand the bank and select the **Questions** link.



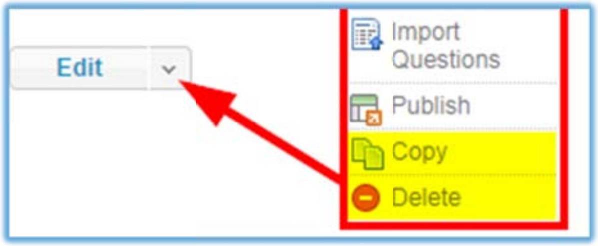
2. Select **Edit** for the question you wish to edit.

Copy or Delete a Question

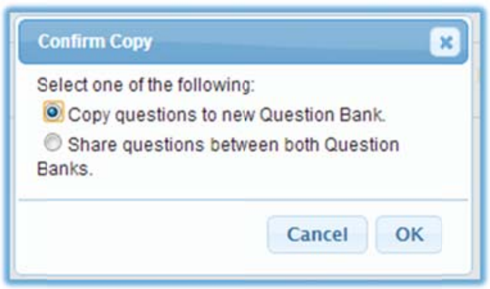
1. Choose a question bank, and then select the **questions** icon or expand the group to select **Questions**.
2. Select the arrow on the **Edit** button next to the appropriate question.
3. Select **Copy** or **Delete** as needed.

Copy or Delete a Question Bank

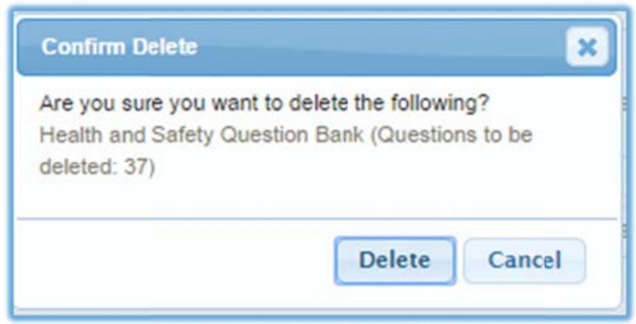
3. Choose a bank, and then select the arrow on the **Edit** button next to the appropriate question.
4. Select **Copy** or **Delete** as needed.



Copy
You can copy to a new bank or share the question in a new bank and the original bank.



Delete
A warning appears before you can delete the bank. A bank, along with its questions, can only be deleted if the questions are not being referenced (as opposed to copied) within tests. In cases where you can't delete a bank, a warning appears, and the bank is not removed.



Deleting Question Banks

1. A bank along with its questions can only be deleted if the questions are not being referenced within tests.
2. Questions within a test that have been copied from a bank are not deleted with a bank and remain as local copies within the test.
3. If questions within a question bank are referenced in tests, then you will be prevented from deleting the bank.

Question Difficulties

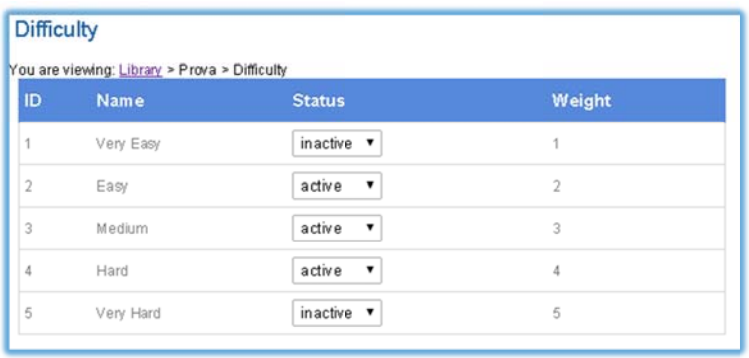
You can opt to apply question difficulties to any of the questions in a question bank and then select questions with specific difficulties when building a Prova test. You can choose to activate or deactivate selected levels for a selected bank and change the dictionary names of the difficulties. Alternatively, you can simply forgo assigning a difficulty to a question. There are five default difficulty levels: very easy, easy, medium, hard, and very hard.

Define Difficulties

This feature is available to Site Managers, campus Admins, and Publishers.

1. Select **Difficulty** from the question bank navigation menu

2. Select **Difficulty** from the question bank navigation menu and inactivate any difficulties you do not want to use.



Changing the Names of the Difficulties

There is a maximum of 5 available difficulties with static weight values. You may opt to rename the difficulties, but make sure the new names match the weights. For example, renaming a "very easy" question to "very difficult" will give a difficult question less weight than an easy one. The dictionary labels for the difficulties are as follows:

Very Easy	question_difficulty_level_name_1
Easy	question_difficulty_level_name_2
Medium	question_difficulty_level_name_3
Hard	question_difficulty_level_name_4
Very Hard	question_difficulty_level_name_5

Details on changing labels in the dictionary can be found in the Languages and Dictionaries chapter of the Site Manager user manual.

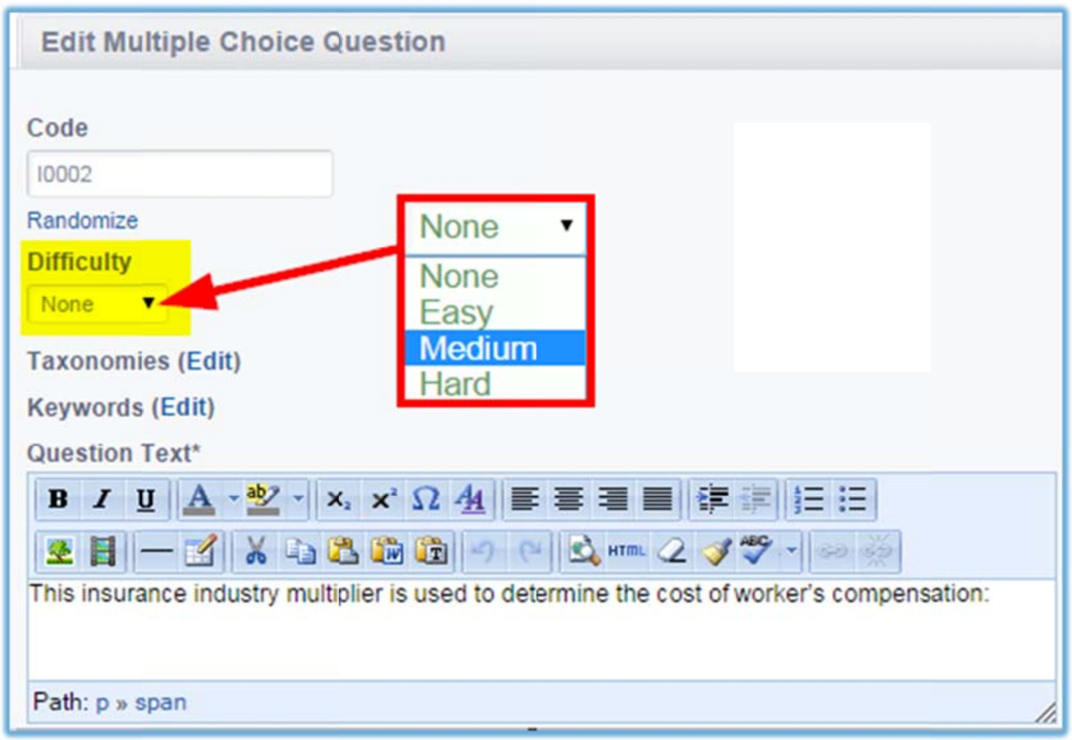
Apply Difficulties to Questions

This feature is available to Site Managers and assigned Campus Admins and Publishers.

1. For the appropriate bank, select the **questions** icon.
2. Select **Edit** for the question you wish to add a difficulty to.

You can see at a glance what difficulty, if any, is already assigned to a question.

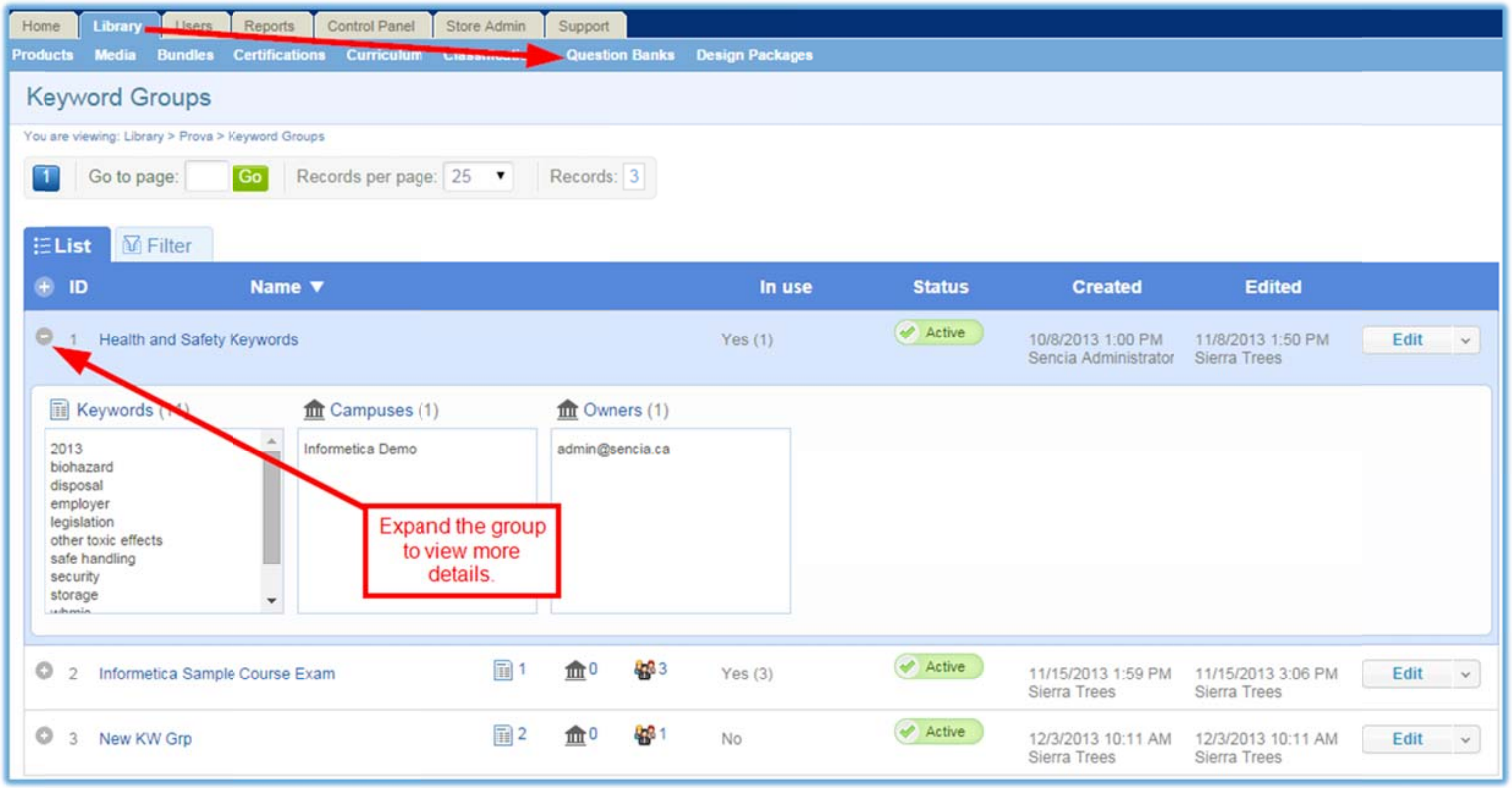
3. Use the difficulty drop down menu to select a difficulty and then **Save.** Note that you can also apply a difficulty during question creation.



Keywords

You can tag specific questions that you create with one or more keywords. Tagging is one way you can organize the questions within a question bank for easy retrieval when building a test. For instance if you have a question bank called Health and Safety, you can tag questions with keywords such as "storage" and "safe handling". Keywords can be any informative word that allows course authors to filter by keyword to find specific questions when building a Prova test. Keywords are housed within keyword groups so that the groups can be made available to specific campuses and users.

Select Keyword Groups from the question bank navigation menu to show a list of the keyword groups already set up in your system or to create new keyword groups.   From the keyword groups page, you can also add, remove, and edit keywords within a group as well as edit existing groups.



Description of the fields

Field	Description
ID	Informetica automatically assigns a unique ID to each keyword group.
Name	The name of the keyword group.
In Use	This means that keywords within the keyword group are being used in (X) number of question banks.
Keywords	The number of keywords in the group. Expand to see a list of the words.
Campuses	The number of campuses assigned to the bank. Assign a campus to allow course authors (e.g. publishers) belonging to that campus to pull questions from the bank when creating a Prova test. Expand to view the campuses.
Owners	Indicates the number of users that have rights to manage the keyword group. You can give specific users access to keyword groups by adding them as a user. Expand to view the usernames.
Status	Toggle the status to active or inactive. Users cannot tag questions with keywords located within an inactive group.
Created/Edited	The date, time, and person who created or edited the bank.
Edit	Change the name and status of the group. Use the down arrow to view an audit trail, copy, and delete groups.

To completely set up a keyword group, follow these steps:

Step 1
- Create a new keyword group

Step 2
- Associate group to specific campuses

Step 3
- Assign users allowed to manage group

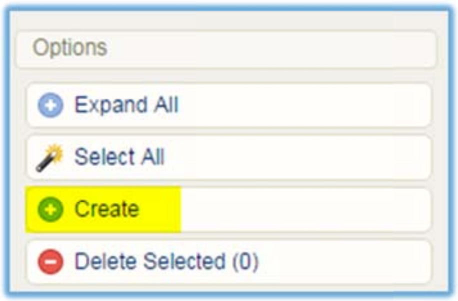
Step 4
- Add keywords to the group

Create New Keyword Group

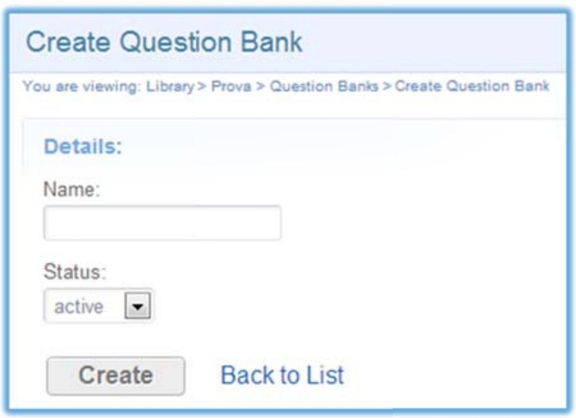
This feature is available to Site Managers.

1. Select **Question Banks** from the library tab and then select **Keyword Groups** from the Navigation menu.

2. Select **Create** from the Options menu



3. Enter the **Name** of the new question bank, set the **Status** to active or inactive, and then **Create**.

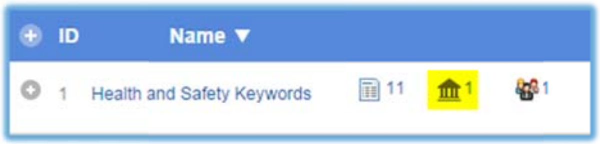


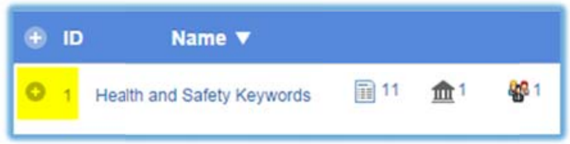
Associate Campuses

This feature is available to Site Managers and assigned Campus Admins and Publishers.

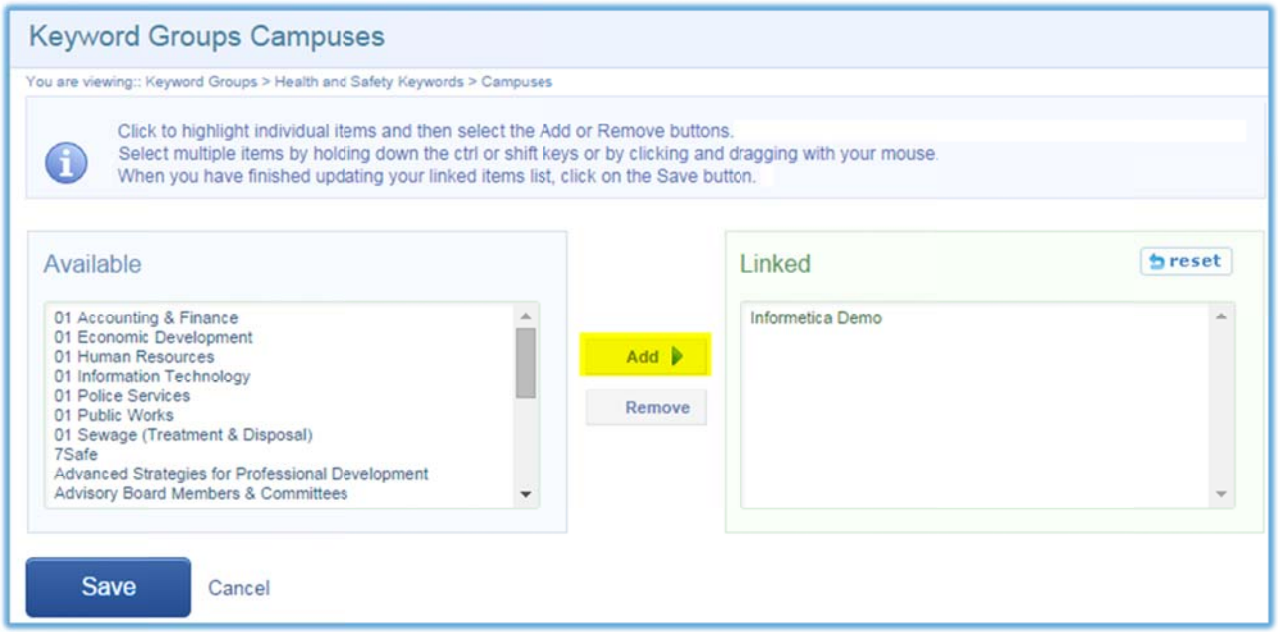
Associating a campus to a keyword group allows Campus Admins and Publishers belonging to that campus to select key words from the group to tag questions in a prova test or within an assigned bank. Expand the group to view the names of campuses already associated.

1. Navigate to keyword groups.
2. Select the **campuses** icon or expand the group and select **Campuses**.





3. Add one or more selected campuses from the available list, and then **Save**.



Using Keywords as Campus Admin & Publisher

Add Keywords to Questions in Prova Tests
Must belong to a campus that is associated to a keyword group.

Add Keywords to Questions in Banks
Must be an assigned user for that bank.

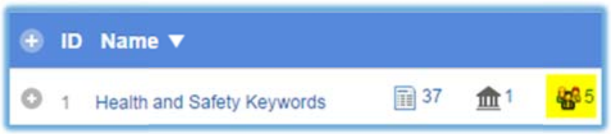
Manage Keywords
Must be an assigned user for that keyword group.

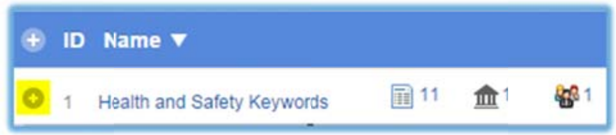
Assign Users

This feature is available to Site Managers and assigned Campus Admins and Publishers.

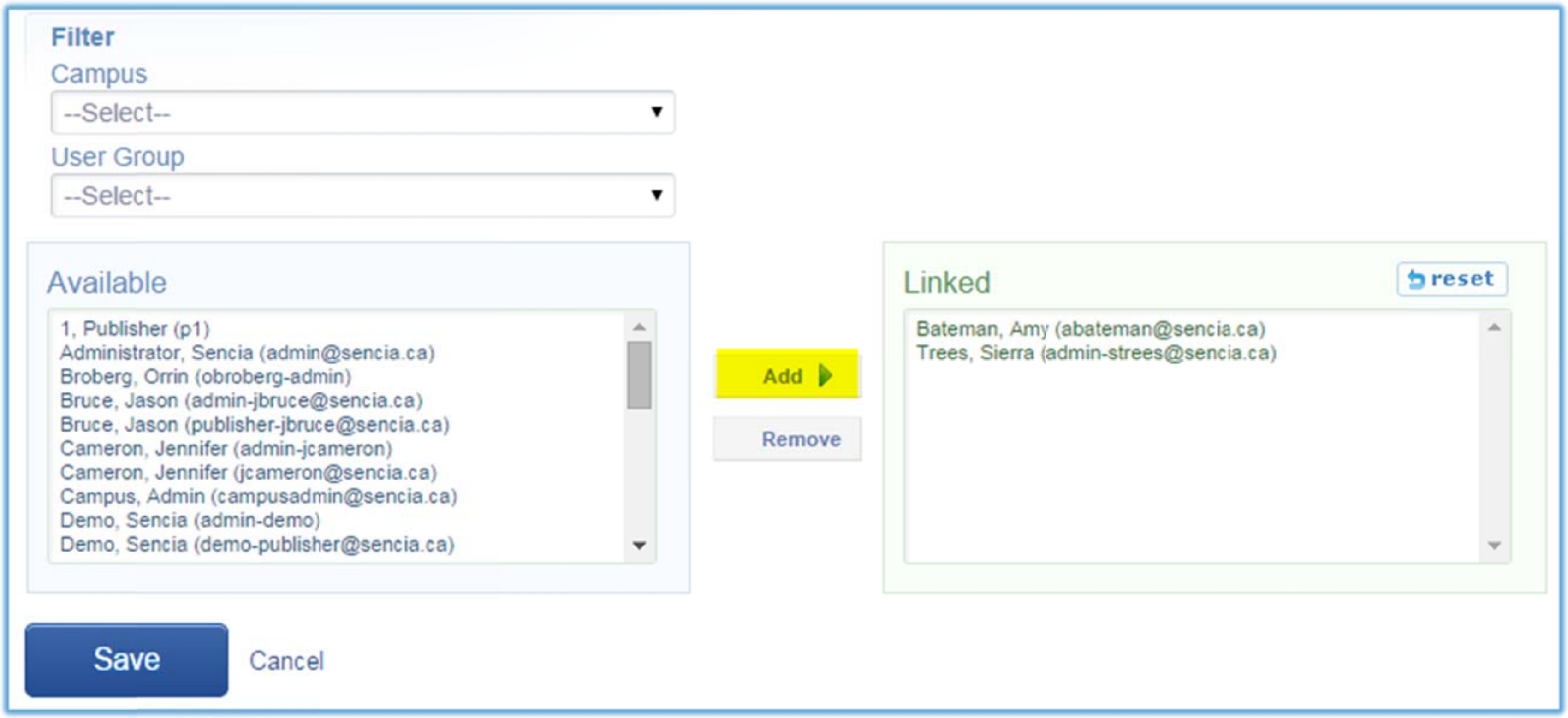
Give specific Campus Admins and Publishers access to manage keyword groups by assigning them to the group. Assigned users will have full access to the keyword group to: create and edit keywords, assign users, delete, change status, add or remove campuses, and create new keywords. Expand the bank to view the users who are assigned.

1. Select the **owners** icon or expand the group and select **Owners**.





2. Add selected users from the available list, and then **Save**. You can filter by campus and user group to help find specific users.



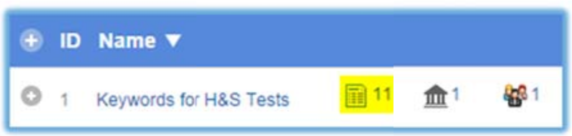
Copy or Delete Keyword Groups

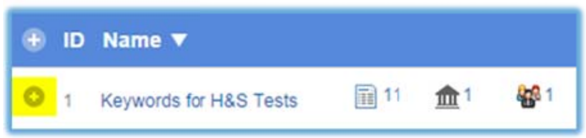
1. Choose a keyword group, and then select the **keywords** icon or expand the group and select **Keywords**.
2. Select the arrow on the **Edit** button next to the appropriate group.
3. Select **Copy** or **Delete** as needed.

Create New Keywords

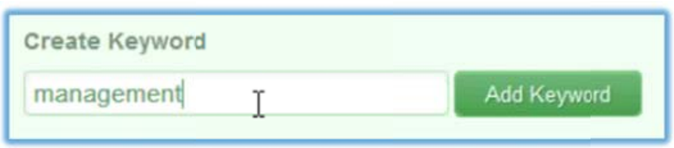
This feature is available to Site Managers and assigned Campus Admins and Publishers.

1. Choose a keyword group, and then select the **keywords** icon or expand the group and select **Keywords**.





2. Enter a word into the Create Keyword field and then **Add Keyword**.



Using Keywords

Many of our clients use keywords to indicate the content of a question, such as **docxShortcuts** to indicate all questions pertaining to Microsoft Word keyboard shortcuts.

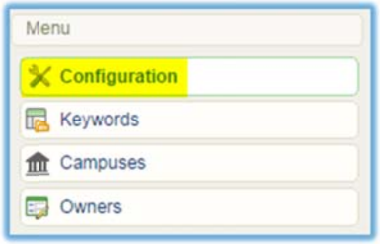
You can get more creative with the use of keywords as well. For example, let's say you want to keep track of question versioning. You could tag all questions reflect new legislation that was passed in 2013 by tagging them with a specific keyword, such as 2013Leg.

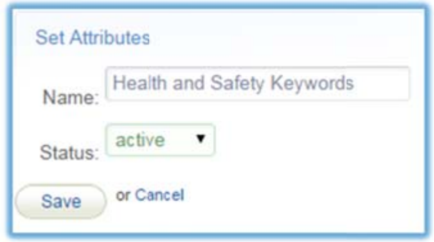
Keywords Navigation Menu

This feature is available to Site Managers and assigned Campus Admins and Publishers.

Configuration

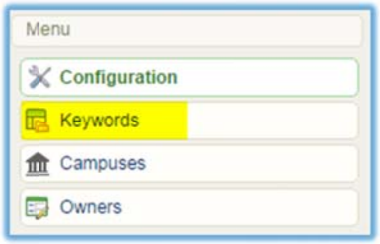
Allows you to change the name and status of the group.

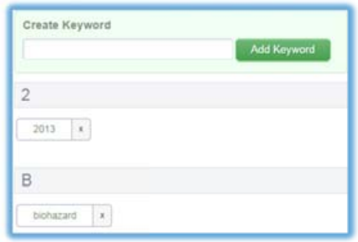


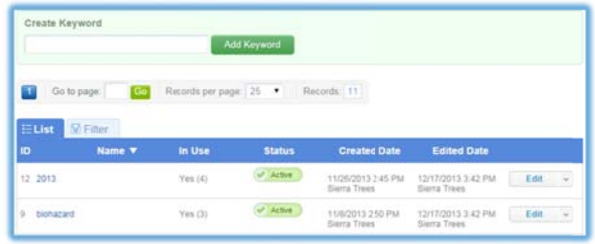


Keywords

Opens the list of words contained in the group. **Switch View** to filter and edit words.

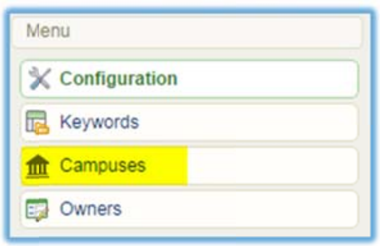


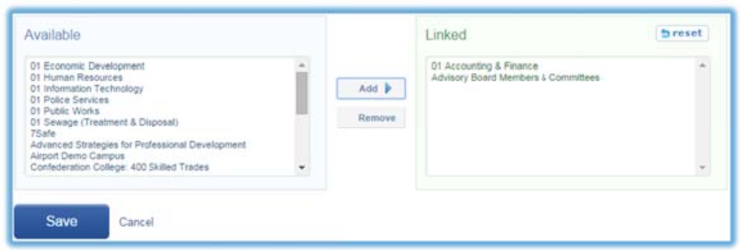




Campuses

Add or edit the campuses assigned to the group.





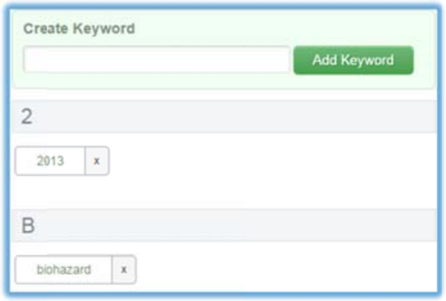
Owners

Add or edit the users assigned to the group.

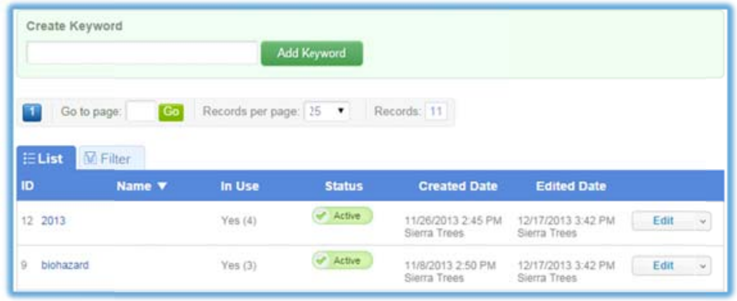
Switch Views

There are two different views for viewing keywords; you can add new words to either. To toggle views, select **Switch View** from the options menu.

Default View is a simple list of terms with ability to add new words.



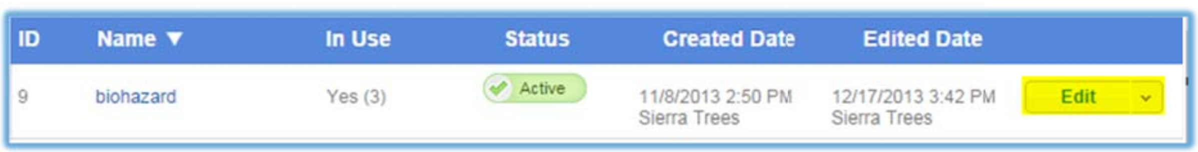
Management List View lets you perform more functions, such as add new words, filter, change status, view an audit trail, and delete words.



Edit or Delete Keywords

1. Choose a keyword group, and then select the **keywords** icon or expand the group and select **Keywords**.
2. **Switch View** from the options menu.

3. To edit: Select **Edit** next to the appropriate keyword.

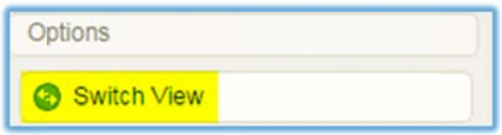


4. To delete: Select the arrow on the **Edit** button next to the keyword and then select **Delete.**

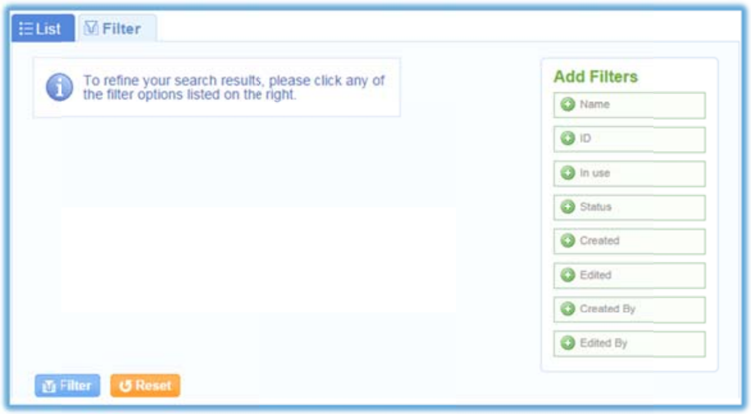
Filter Groups and Keywords

This feature is available to Site Managers and assigned Campus Admins and Publishers.

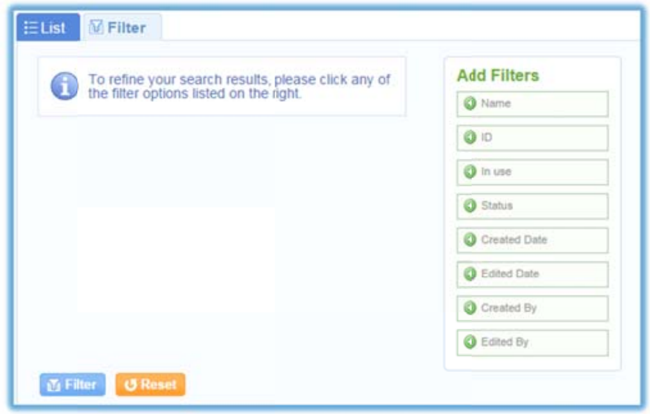
Select the filter tab to narrow down a list of keyword groups or keywords. Select one or more filters from the **Add Filters** list, enter or select criteria for each filter that you selected, and then click **Filter** to get the narrowed list. Use the **X** next to any added filter to remove it or **Reset** to clear all filters. Filters use an OR statement, meaning that the filter will return a list of groups or keywords that fit any of the selected filters. You must **Switch View** to use the filters for keywords.



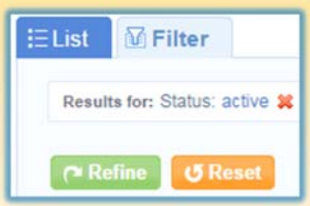
Filter page for keyword groups



Filter page for keywords (Switch View)



Refine and Reset Filters

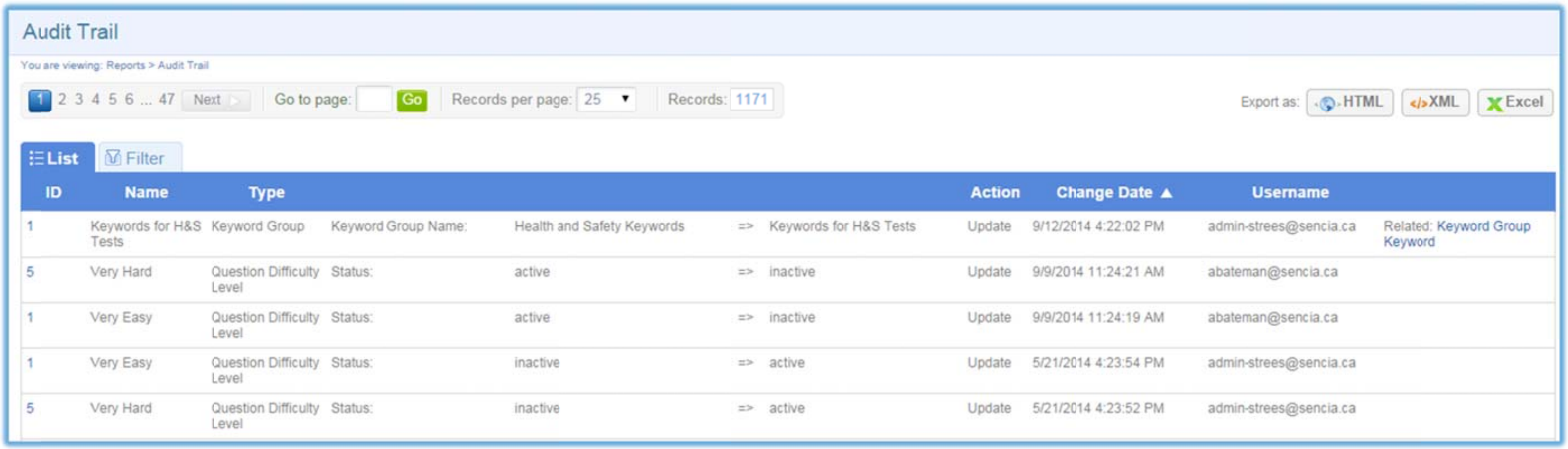


You can reset the filter or refine your results. Refine lets you change your filter options and selections.

Audit Trail

This feature is available to Site Managers and assigned Campus Admins and Publishers.

Informetica records the changes that have been made to key word groups and the word within the groups. Audit trails can be viewed on screen or exported as HTML, XML and Excel files.

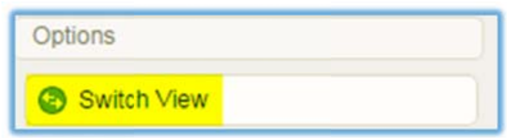


View audit trail for keyword groups

1. Choose a keyword group, and then select the **keywords** icon or expand the group and select **Keywords**.
2. Select the arrow on the **Edit** button next to the appropriate group.

View audit trail for keywords

1. Choose a keyword group, and then select the **keywords** icon or expand the group and select **Keywords**.
2. **Switch View** from the options menu.



3. Select the arrow on the **Edit** button next to the appropriate keyword.

Add Keywords to Questions

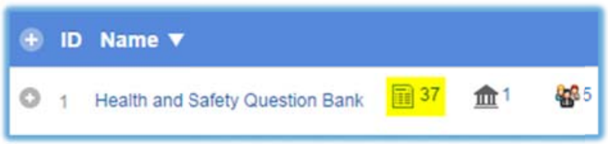
This feature is available to Site Managers and Campus Admins and Publishers.

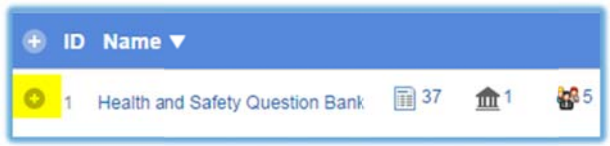
Campus Admins and Publishers with the proper permissions may tag questions with keywords.

Adding Keywords to Question Bank Questions

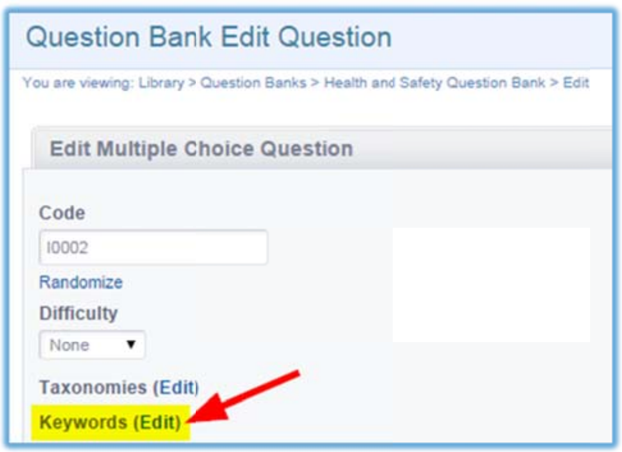
The Campus Admin or Publisher must be assigned to the question bank so to access the questions. Note that you can also apply a difficulty during question creation. If the Campus Admin or Publisher does not have access to the bank, they can still add keywords to questions if they belong to a campus associated to the keyword group.

1. Navigate to question banks.
2. Select the **questions** icon or expand the bank and select **Questions**.



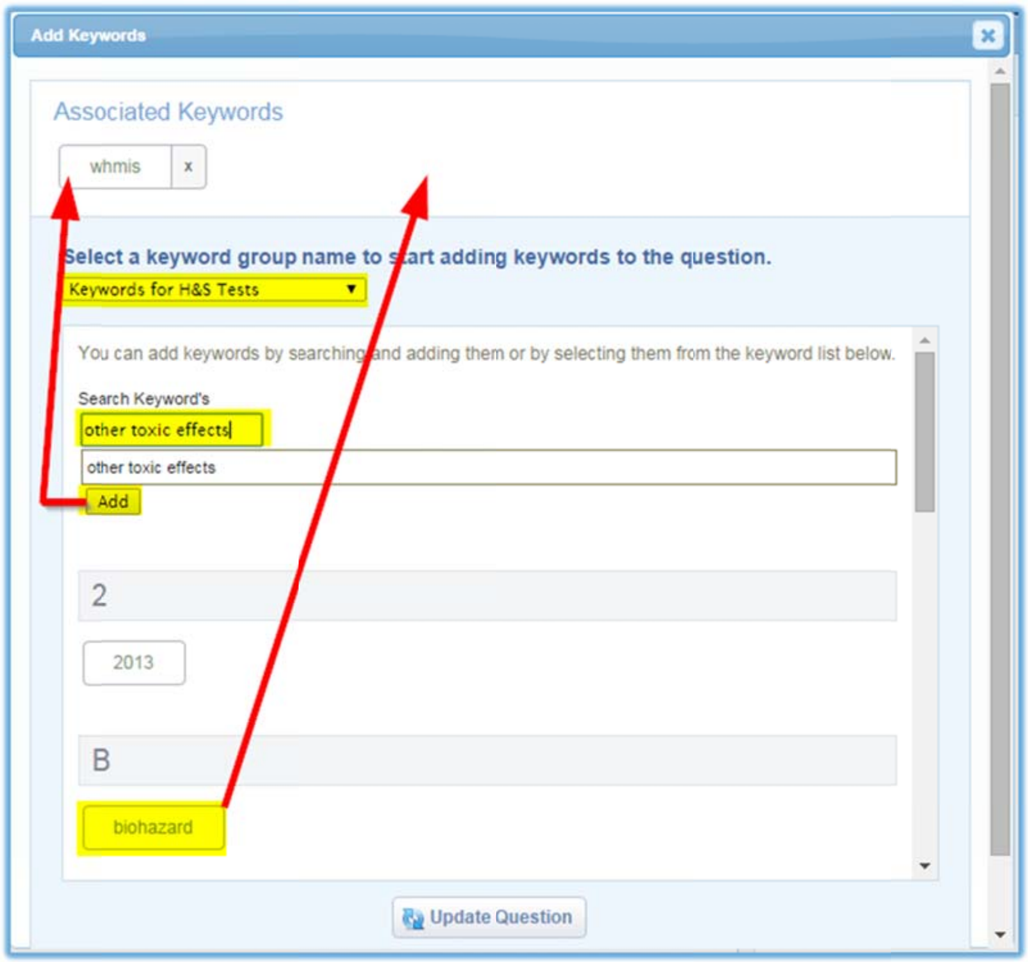


3. Select **Edit** for the question.
4. Now that the question is open, select **Edit** next to Keywords.

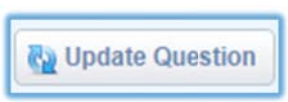


5. Now that the question is open, select **Edit** next to Keywords.
6. There are two ways to tag the question with keywords. The tags you select show under Associated Keywords where you can remove them (select the **X** next to any word) before saving the question.

a. Use the search field to type out a term and select **Add**. The search field has an autocomplete feature that displays existing keywords as you begin to type into the field.
b. Select a term from the list of terms. In the example below, clicking the word biohazard will add it to associated keywords.



7. Select **Update Question** when you are done tagging to save the keywords to the question.

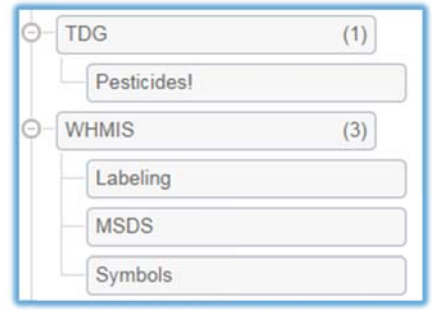


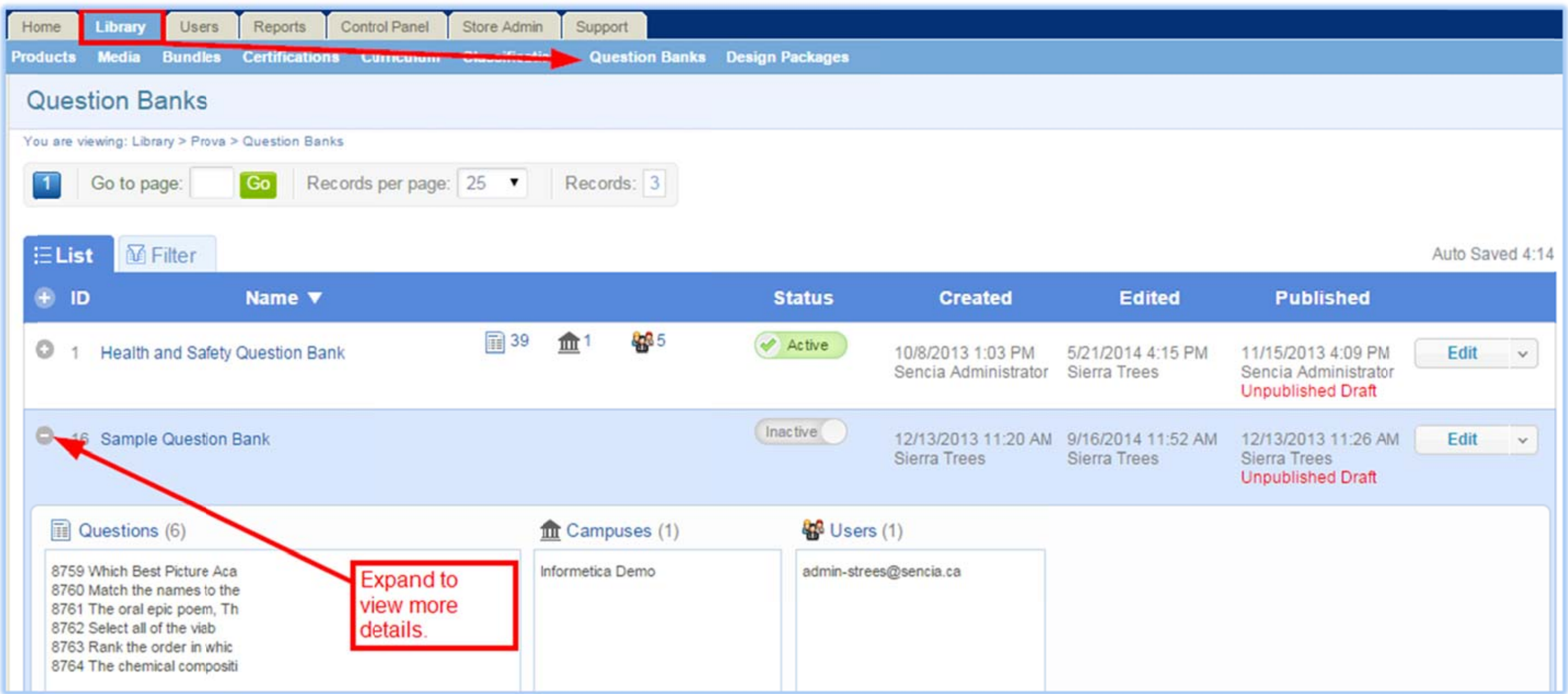
Taxonomies

This feature is available to Site Managers.

Taxonomies offer an optional way to group questions into an organized format and can be an important part of your information architecture. You can categorize questions and then pull them via taxonomy based filters into a Prova test. When you create a Prova test, you will have the option to select a higher level term or narrow down to a finer granular term. For instance, you can opt to select the taxonomy called Health and Safety and then narrow results to the top level term “WHMIS” to pull all 25 questions about WHMIS or choose a nested term such as “Symbols” to narrow the selection further. Taxonomy is commonly used during test creation for defined sections of a test or to cover specific content topics. Taxonomies can be used in conjunction with keywords and question difficulties.

Health and Safety Taxonomy





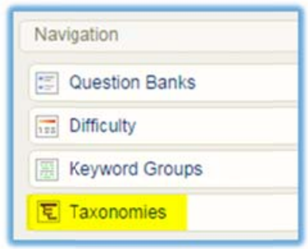
Planning Taxonomies

The first step in establishing a taxonomy is creating a new vocabulary. Next you provide the terms that fall within that vocabulary. The arrangement can be "flat," as in a tagging system, or hierarchical, with parents and children.

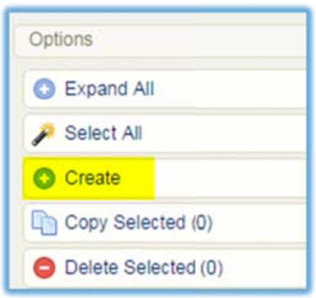
Create New Taxonomy

This feature is available to Site Managers.

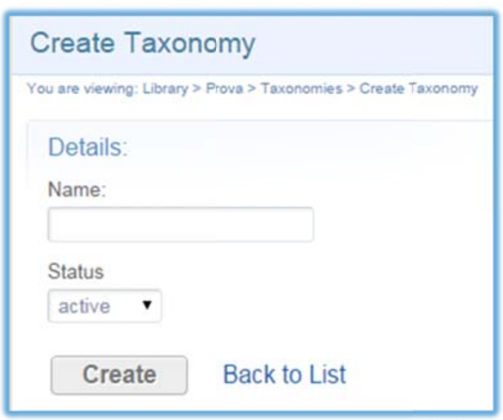
1. Select **Question Banks** from the library tab, and then select **Taxonomies** from the navigation menu.



2. Select **Create** from the options menu.



3. Enter the **Name** of the new taxonomy, set the **Status** to active or inactive, and then select **Create**.



Example of Music Taxonomy

Here's an example of how you might set up a taxonomy arranged by musical genre:

Term = Classical
- Sub-term = Concertos
- Sub-term = Sonatas
- Sub-term = Symphonies

Term = Jazz
- Sub-term = Swing
- Sub-term = Fusion

Taxonomies Apply to Questions

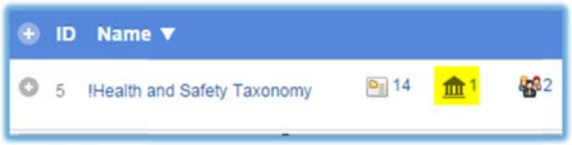
Taxonomy terms are assigned to question bank questions, not to the question banks themselves.

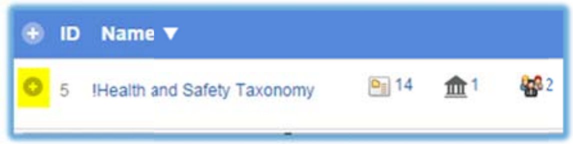
Associate Campuses

This feature is available to Site Managers and assigned Campus Admins and Publishers.

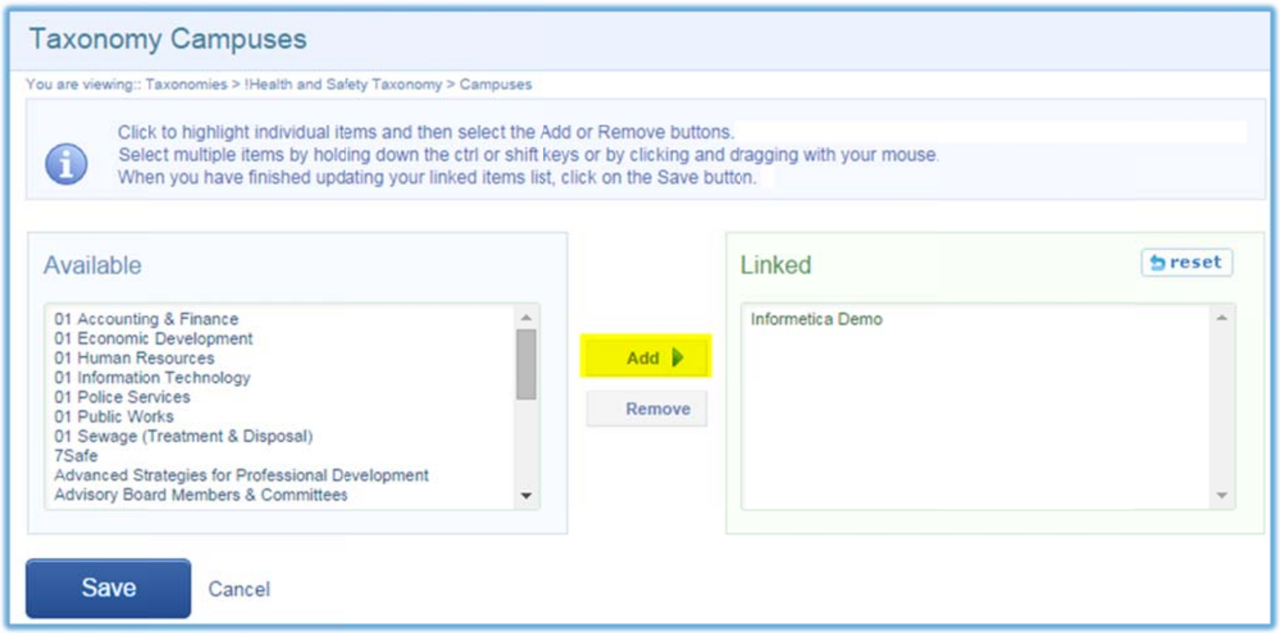
Associating a campus to a bank allows course authors (e.g. Campus Admins, publishers) belonging to that campus to pull questions from the bank to create a Prova test. Expand the bank to view the names of campuses already associated.

1. Select **Question Banks** from the library tab, and then select **Taxonomies** from the navigation menu.
2. Select the **campuses** icon or expand the taxonomy and select **Campuses**.





3. Add one or more selected campuses from the available list, and then **Save**.



Campus Admins & Publishers

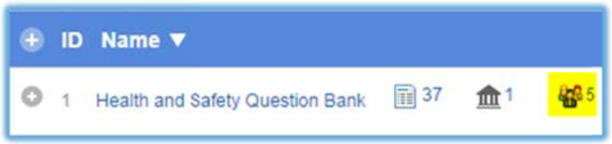
Campus Admins and Publishers in associated campuses have access to taxonomies when building a test.

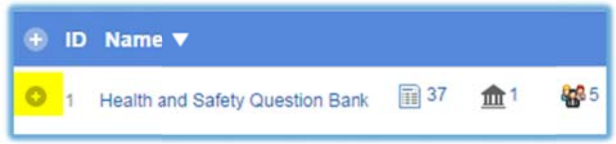
Assign Users

This feature is available to Site Managers and assigned Campus Admins and Publishers.

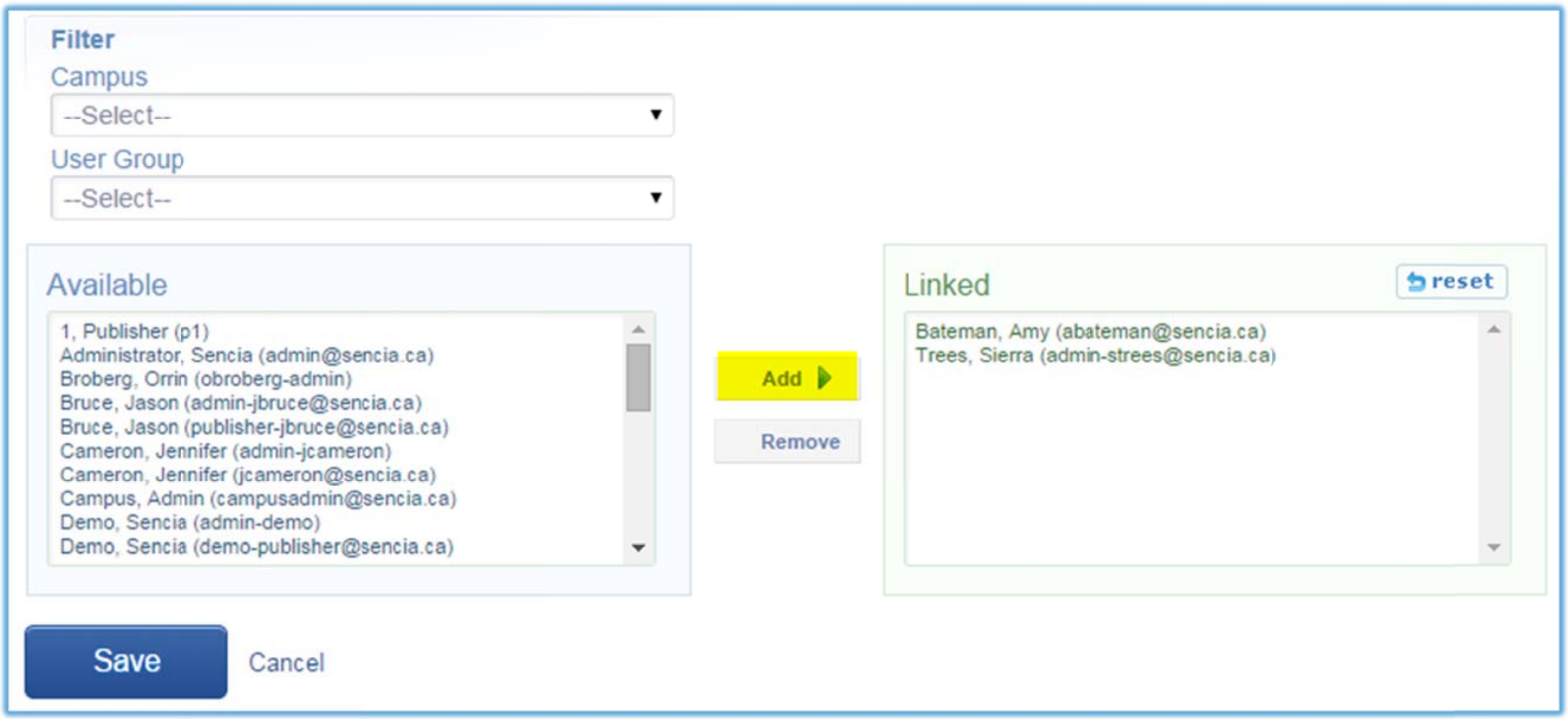
You can assign specific Campus Admins and Publishers to a taxonomy, allowing them to manage it: create new terms, assign users, copy, and delete taxonomy, change status, add or remove campus associations, and edit terms and position in taxonomy.

1. Navigate to question banks.
2. Select the **users** icon or expand the bank and select **Users**.

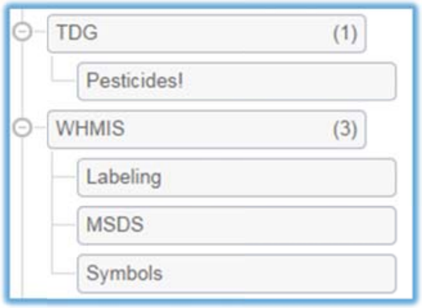




3. Add selected users from the available list, and then **Save**. You can filter by campus and user group to help find specific users.



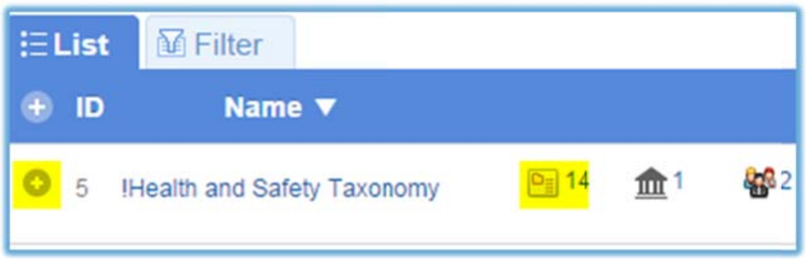
Create Taxonomy Terms



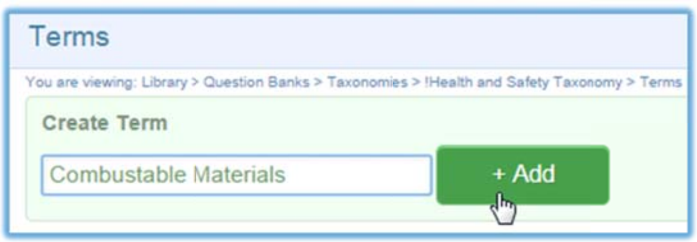
Campus Admins & Publishers Can Add Taxonomy Terms

Campus Admins and Publishers must be assigned users to add terms to a taxonomy.

1. Navigate to Taxonomies. Expand the taxonomy and select **Terms** or select the **terms** icon. The number next to a top level term indicates the number of terms nested below it.



2. Enter a term and select **Add**.

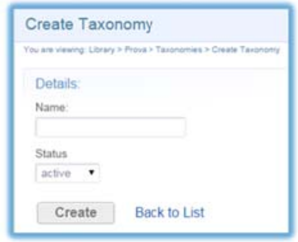


Taxonomies Navigation and Tools Menu

Open any taxonomy to access the navigation and tools menu for that taxonomy.

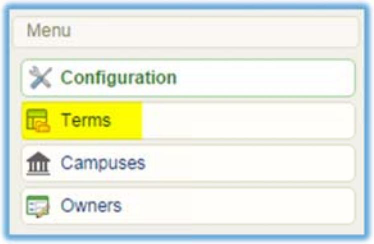
<u>Configuration</u>

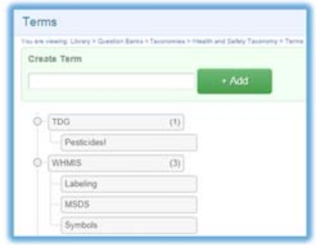
Allows you to change the name and status of the taxonomy.



<u>Terms</u>

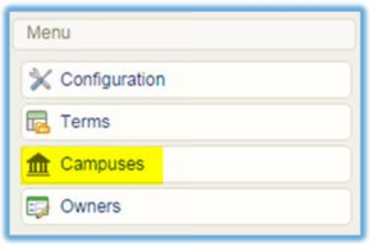
Opens the list of words contained in the taxonomy.

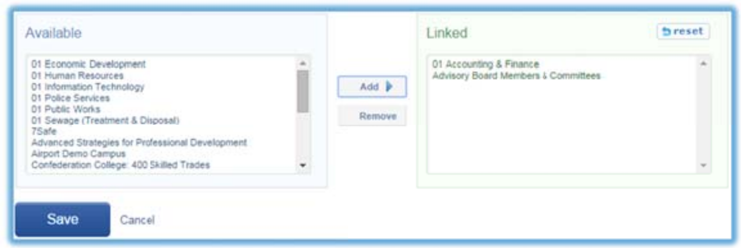




<u>Campuses</u>

Add or edit the campuses assigned to the taxonomy.



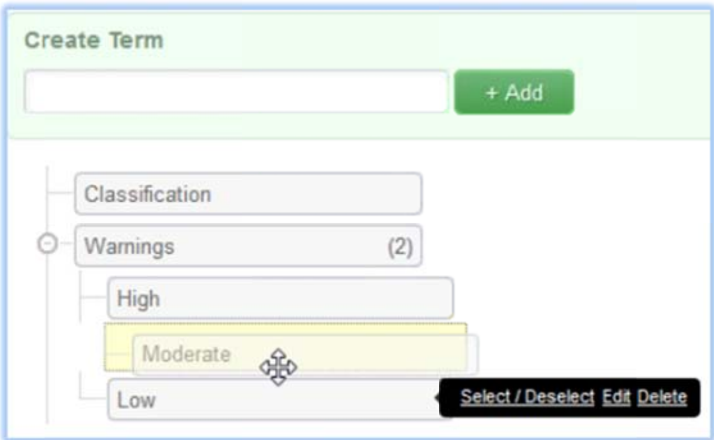


<u>Owners</u>

Add or edit the users assigned to the taxonomy.

Move or Reorder Terms

Drag and drop a term to change its location in the list or to nest it beneath another term to create a sub-term. Reordering can only be done via the default view.



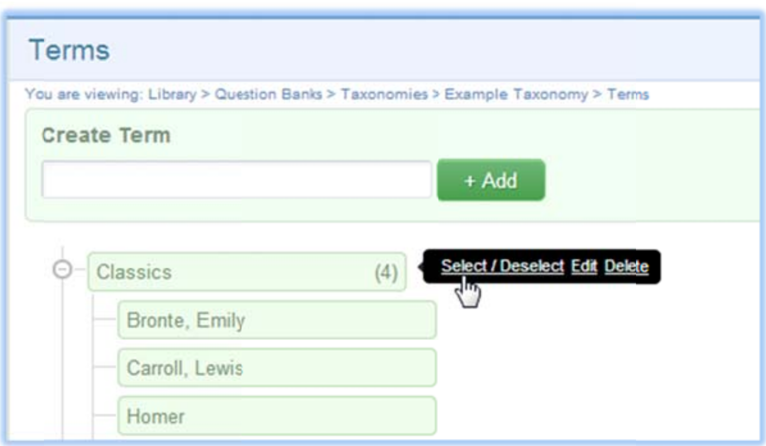
Movement and Term Relationships

When you move a term, its related sub-terms will move with it, retaining the current relationship. You can move sub-terms to nest under different terms or into a top level position.

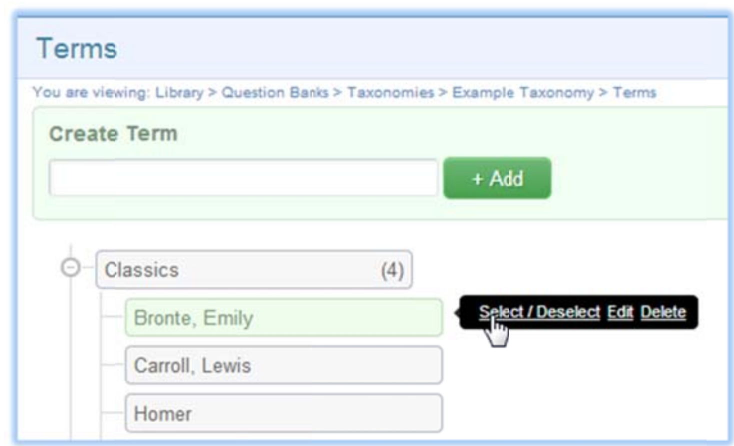
Select, Edit, or Delete Terms

To select a single term, hover over the term to open a menu and then choose **Select** to select that term.

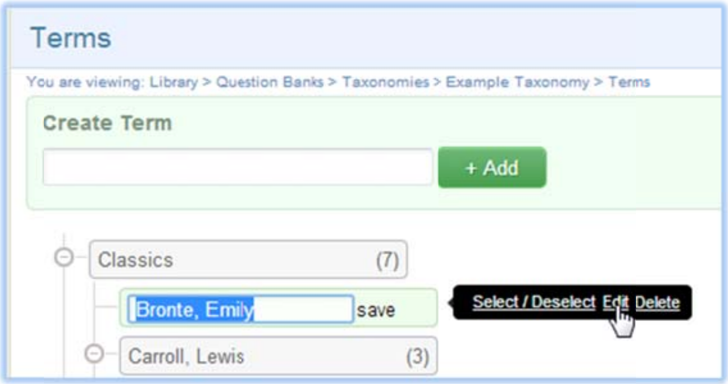
Select top level to also select all nested terms



Select nested term to select only a single term.



To edit a term, hover over the term to open a menu and then choose **Edit** to change the term.



To delete a term, hover over the term to open a menu and then choose **Delete** to permanently delete the term from the taxonomy.

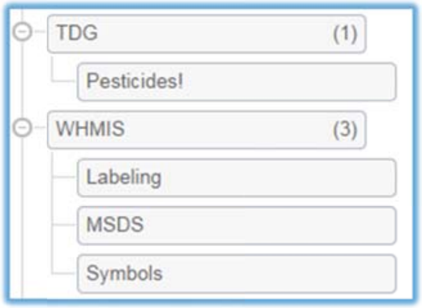
Delete and Term Relationships

When you delete a term, its related sub-terms will also be deleted. You can move a sub-terms before deletion to avoid this.

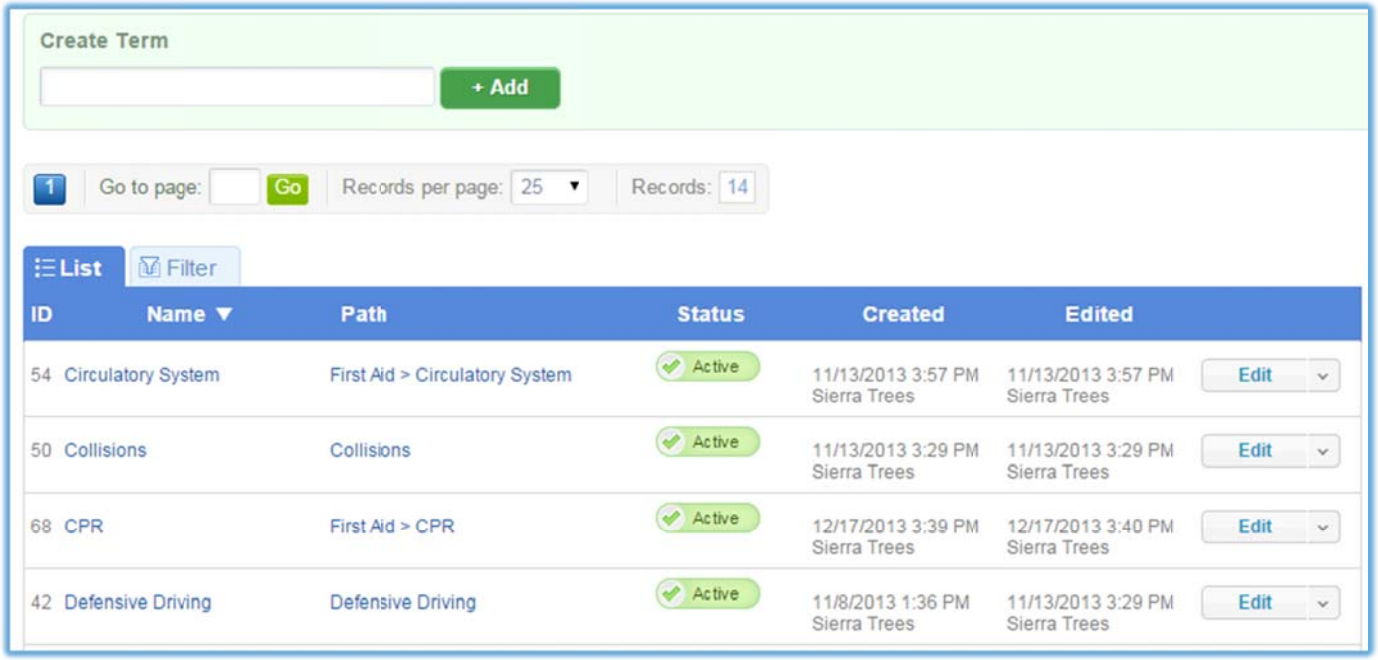
Switch View

There are two different views for viewing terms; you can add new terms within either view. To toggle views, select **Switch View** from the options menu.

Default View is a simple list of terms with ability to add, select, edit, delete, reorder, and view the relationship of terms.

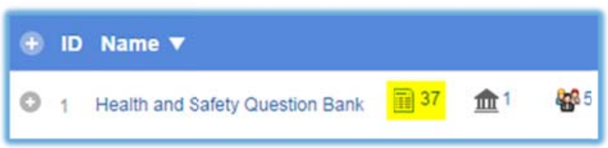


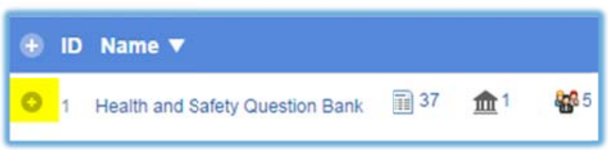
Management List View lets you perform more functions, such as add new words, view the relationship of terms, filter, change status, view an audit trail, copy, and delete terms.



Apply a Taxonomy Term to a Question

1. Navigate to question banks.
2. Select the **questions** icon or expand the bank and select **Questions**.

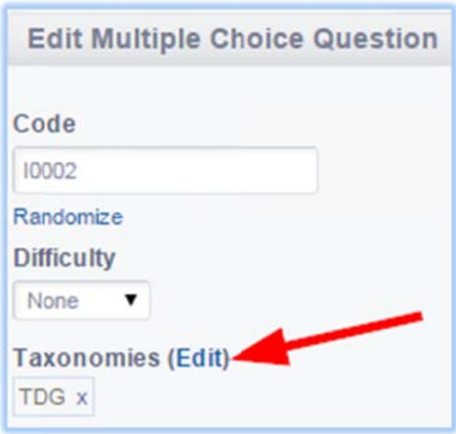


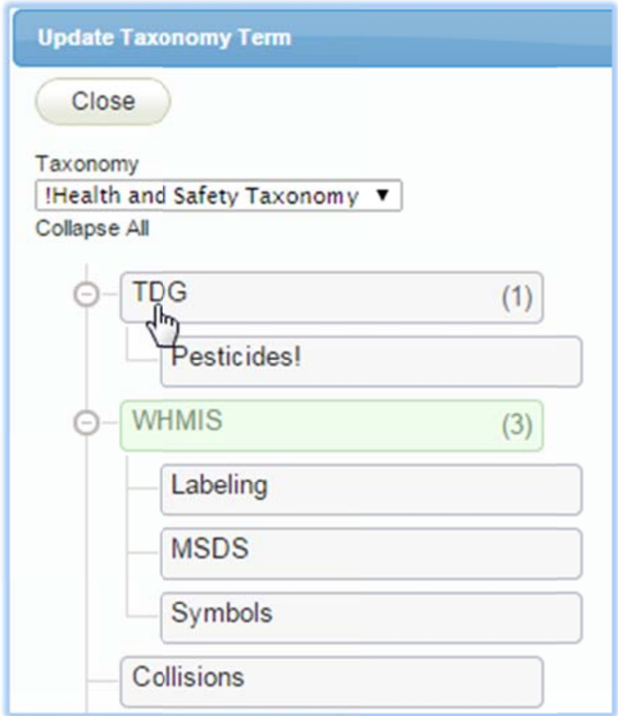


One Taxonomy Term per Question

Only one taxonomy term can be applied to a question, however, it can be a top level term or a sub-term. When a term is applied to a question any related sub-terms are included as well.

3. Select **Edit** for the question you wish to add a taxonomy terms to.
4. Within the question, select **Edit** next to Taxonomy.

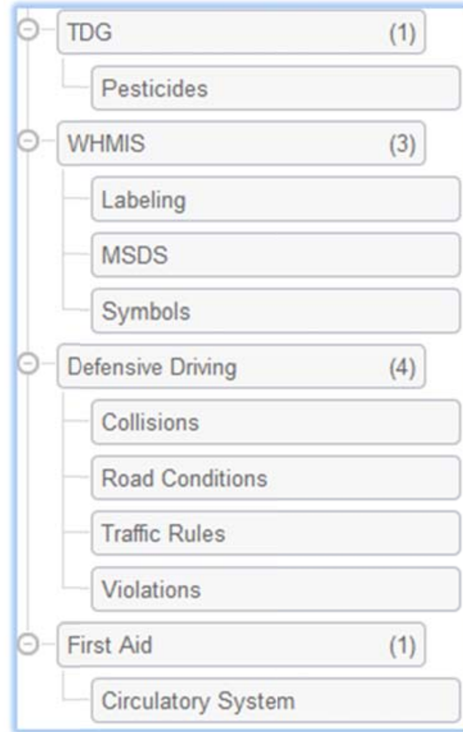




Frequently Asked Questions

What is the difference between keywords and taxonomies?

You may find that in some cases you will not use both, but used in combination, keywords and taxonomies are a powerful test building tool.



Taxonomies	VS	Keywords
Taxonomies are used when a question needs to live in one location only. It is similar to filing a question in a specific location.		Keywords are used if you want to apply multiple words to filter questions or if questions need to be found in multiple ways. Think of keywords like tagging a question with a property.

Many people may live in the same neighborhood (taxonomy), but your properties are different such as: house colour, method of transportation, pets, and jobs. These are your keywords. You can use keywords to pull questions across multiple taxonomy terms. So for example, in the Health and Safety Taxonomy pictured, I could filter questions by the Health and Safety taxonomy and then instead of drilling down to select from a specific nested term, I could search by keywords that would allow me to pull from all terms in the taxonomy. For example, the keywords: legislation and 2013 Updates are used throughout the taxonomy, among different terms, so you can filter questions first by the Health and Safety taxonomy and then by the keywords legislation and 2013 Updates to find specific questions when building a test.

How do I ensure that only specific campuses can pull questions by keyword?

Keywords and taxonomies are only indirectly associated with question banks, so if a user is attached to a question bank they don't necessarily have access to edit the keywords or taxonomies.

How do I ensure that all publishers in all campuses can build a test using a taxonomy only associated with X campus?

You would need to assign each of the campuses to the taxonomy.

How can I make a taxonomy apply to all campuses, but not let the question bank be assessable by all campuses?

Assign the taxonomy to all campuses, but assign only specific campuses to the question bank. Keywords and taxonomies are only indirectly associated with question banks, so if a campus is attached to a question bank they don't necessarily have access to edit the keywords or taxonomies.

Do the same users & campuses need to be associated to a bank and taxonomy that are exclusive to one campus?

For one campus to use a question bank exclusively, you would only assign that campus to the question bank. For one campus to use a taxonomy exclusively, you would only assign that campus to the taxonomy. If someone is building a test and they have access to the question bank but not to the taxonomy, then that would mean that they can use questions from the question bank, but would not be able to filter questions by that taxonomy.

Can I Export Questions?

This feature is not currently available for Prova test questions or question banks.

I am a Publisher. How do I add images to my questions?

Currently, adding media to questions built within a question bank is only possible for Site Managers. We plan to add this functionality for Campus Admins and Publishers in a future release. Campus Admins and Publishers can create a question with images directly within a Prova test and then add it to a question bank they manage.

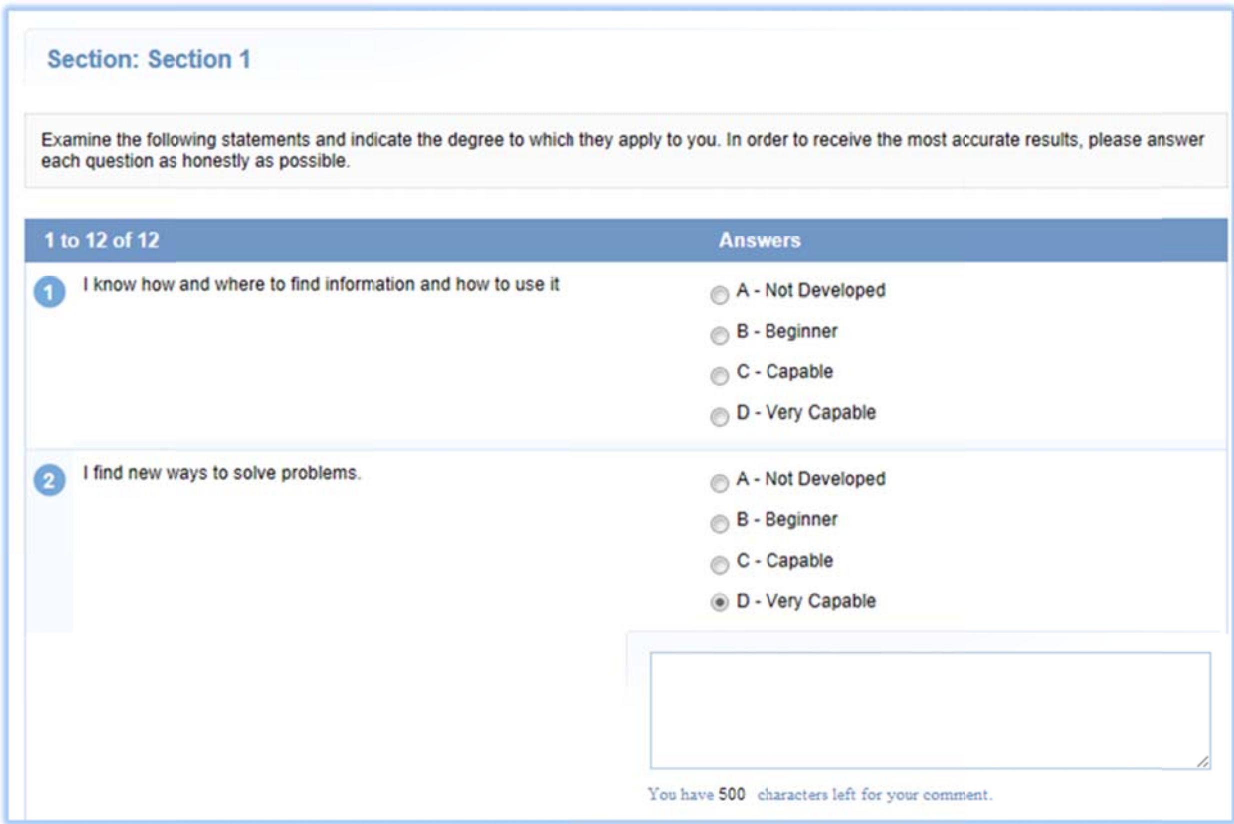
How do I use pools for questions in a bank?

Pools are only available when creating questions directly within a Prova test. There are no pools per say in a question bank. However, when you are gathering more than 1 dynamic question from a bank into a test you can get the same effect. When you do this you will see that a test will have Q1 to Q5 as a single "pool" for example. If you have created questions directly in a Prova test that have pools, you can add those questions to a bank, but they will be added as separate questions.

28. 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:

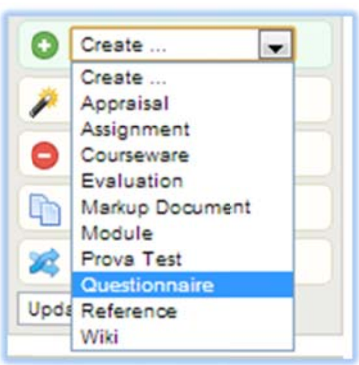
- Which of their employees are taking the questionnaire and how many times they attempted the it,
- The date of employees' last completion,
- Each employee's response "score" (i.e. level of competency within a given skill set).

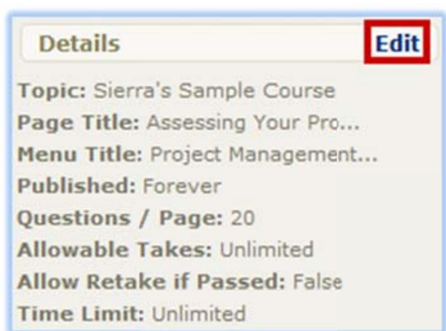
28.1 Create a Questionnaire or Edit Details

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

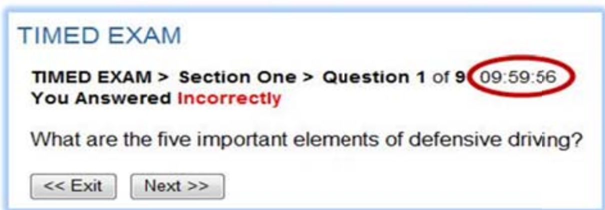
- ✓Create a questionnaire
- ✓Create questionnaire buckets
- ✓Create questionnaire sections
- ✓Create bucketed questions within questionnaire sections

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.

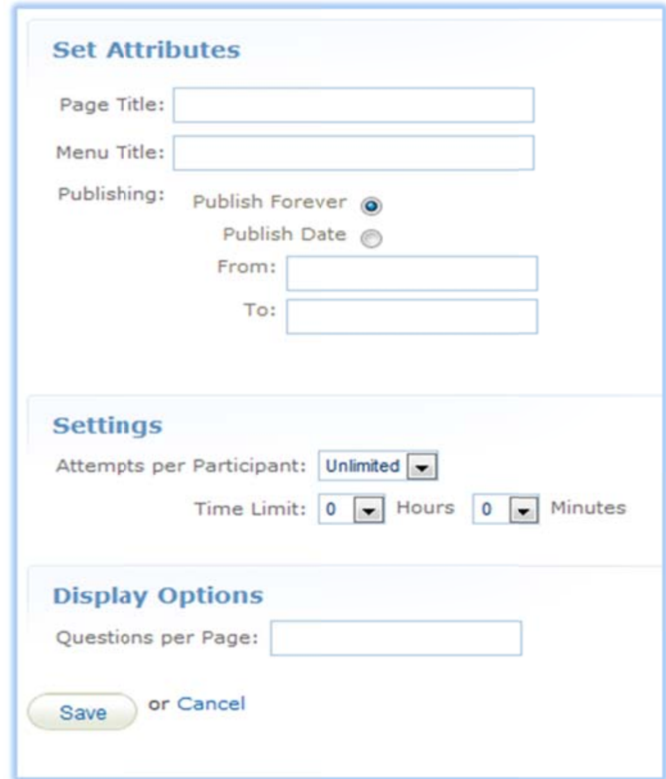




1. Enter the **Page Title**. It will show up on the top of online content pages.
2. Enter the **Menu Title**. It will show in the assets list and in side menus. Menus have limited display room and longer the menu title can look cramped.
3. Select **Publishing** options. Select publish forever to make the questionnaire always available to all participants with access. Select a specific publish date to make the questionnaire available to participants with access, but only during the published dates. If the questionnaire falls before or after the published dates, enrolled participants will no longer see it.
4. Define the number of **Attempts per Participant**. Allow participants unlimited attempts, or restrict them to 1-5 attempts.
5. Optionally add a **Time Limit**. The amount of remaining time will appear to the participant at the top of every question page.

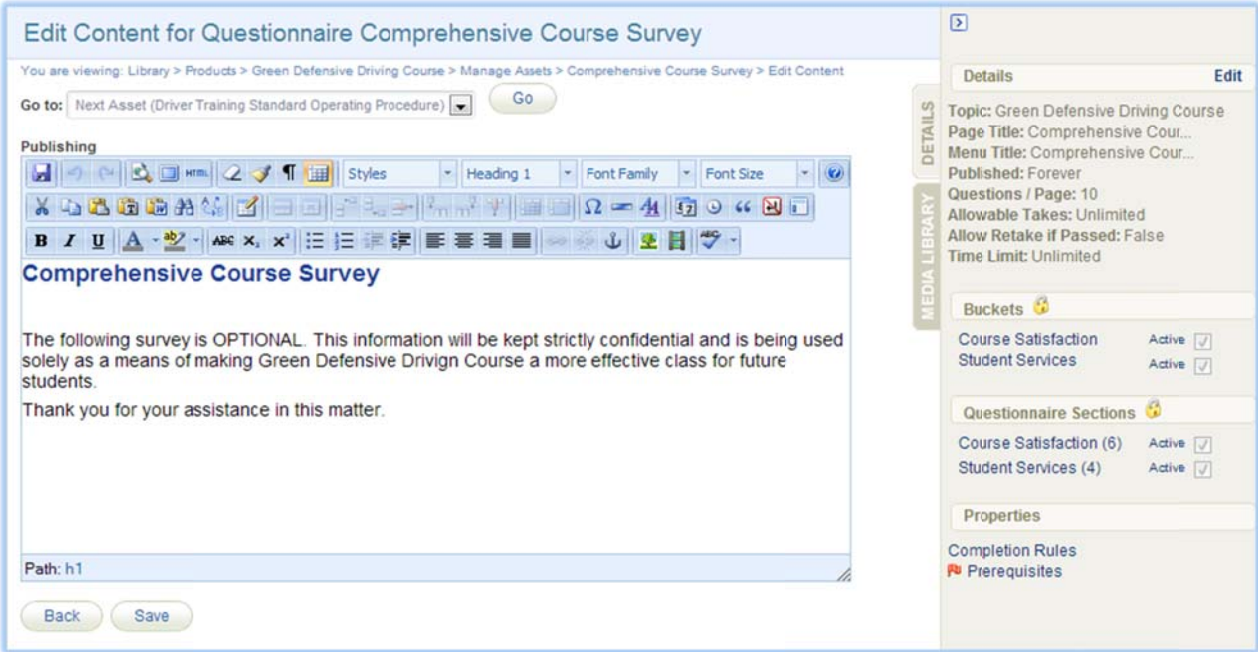


6. Enter the number of questions you want displayed on each page of the questionnaire for the participant to see.
7. Save.

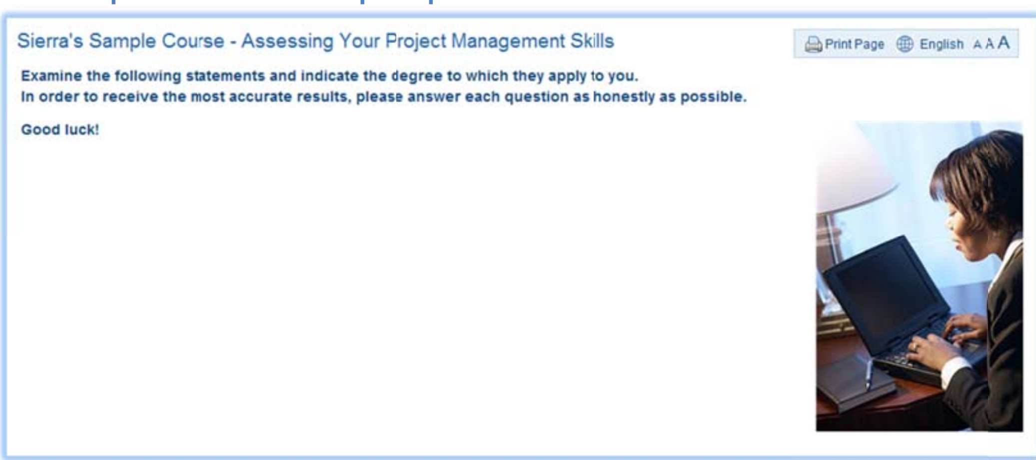


28.2 Create or Edit a Custom Introduction

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



28.3 Create Buckets

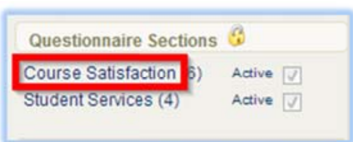
After creating a questionnaire, you need to create at least one new bucket for it. From the manage assets page, click on the questionnaire that you wish to create a bucket for. Click the create link on the side bar under the buckets menu. Enter a name for the bucket and click the save button. After saving, you will be returned to the questionnaire's edit content page.

> **Locked Sections**
>
> 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.

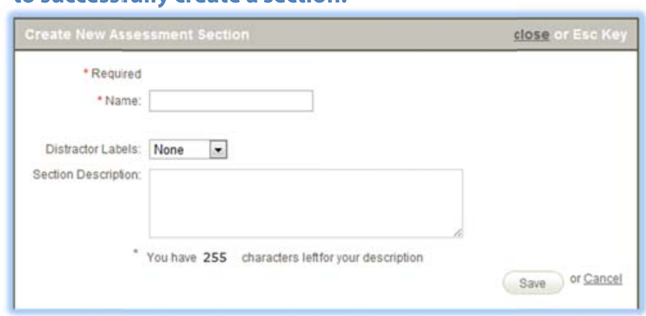
28.4 Create Sections

After you have created a bucket you will need to create at least one new section.

1. Select **Create** next to the questionnaire sections menu to open the Create New Questionnaire Section page.



Every field indicated with a red asterisk * requires an entry to successfully create a section.



2. Click on any section name to edit it.
3. Enter a **Name** for the section.
4. Optionally change the **Distractor Labels** to letters or numbers.
5. Add an optional **Section Description**.
6. Save and activate. Participants can only see active sections.

28.5 Create and Edit Bucket Questions

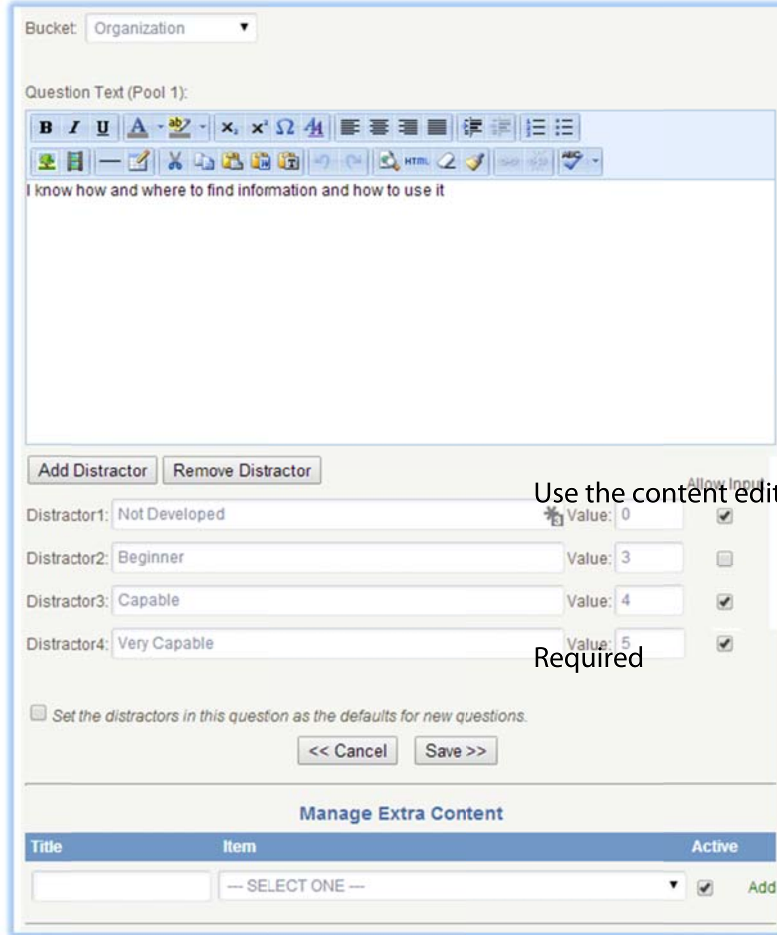
After you have created buckets, you can create questions.

1. **Select the Section** the questions will belong to.

2. Choose **Create Bucket Question** from the options menu to open the Create Question page (shown at right).

3. Select a bucket from the drop down menu.
4. Design your question in the content editor.
5. Enter the text for each distractor.
6. **Add Distractors** to create more distractors for the question.
7. Select distractor text and **Remove Distractors** to delete.
8. Values must be a numbered 0 or higher for each distractor.
9. **Allow Input** creates a user comment box for selected distractors.
10. Toggle "Set the distractors in this question as the defaults for new questions" if you would like the same distractor texts to appear on all of the questions. You can always change them later.
11. **Save**.

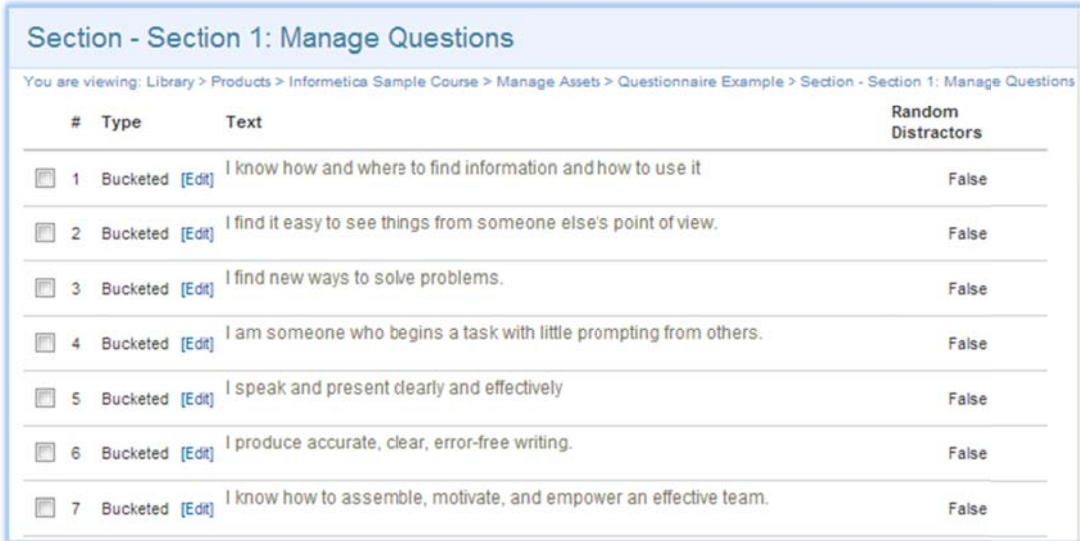
Create/Edit Question Page



When you edit, **Manage Extra Content** is available. This allows you to create a link to a relevant in the product. Participants will see the link at the bottom of the question when they take the questionnaire. You do not have to click save to update the Manage Extra Content area. Enter a name for your extra content. 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. Participants will only see active content. **Add** to create the content link. **Del** to remove the content link.

28.6 Manage Questions

Select the Section link from the Questionnaire Sections menu for the section that contains the questions to edit to 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.

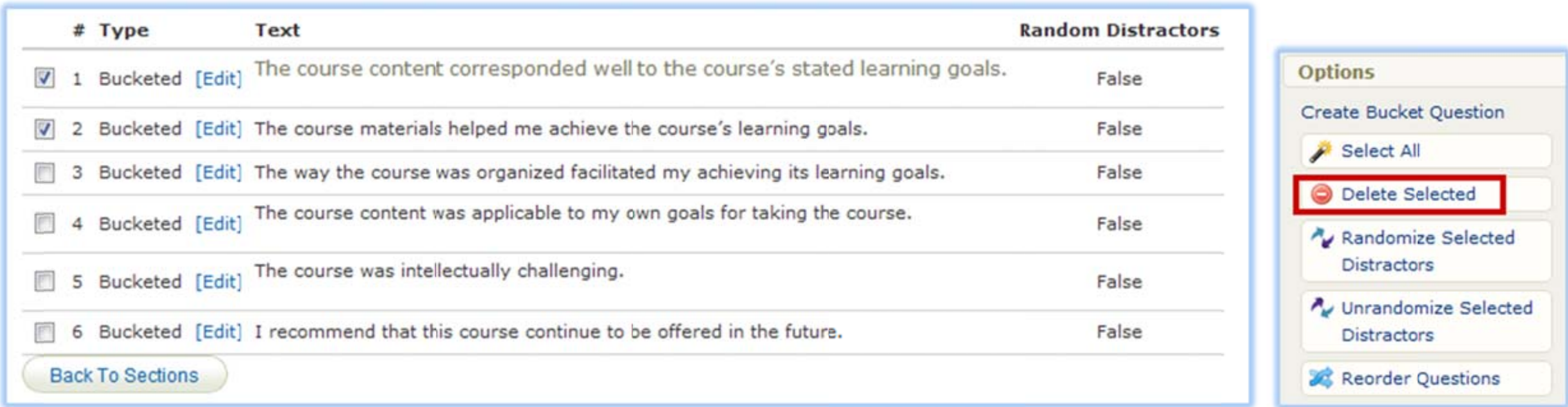
True: distractors will be shown to the user in a random order every time the question is displayed.

False: distractors will always appear in the order in which they are set up within question.

28.6.1 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 

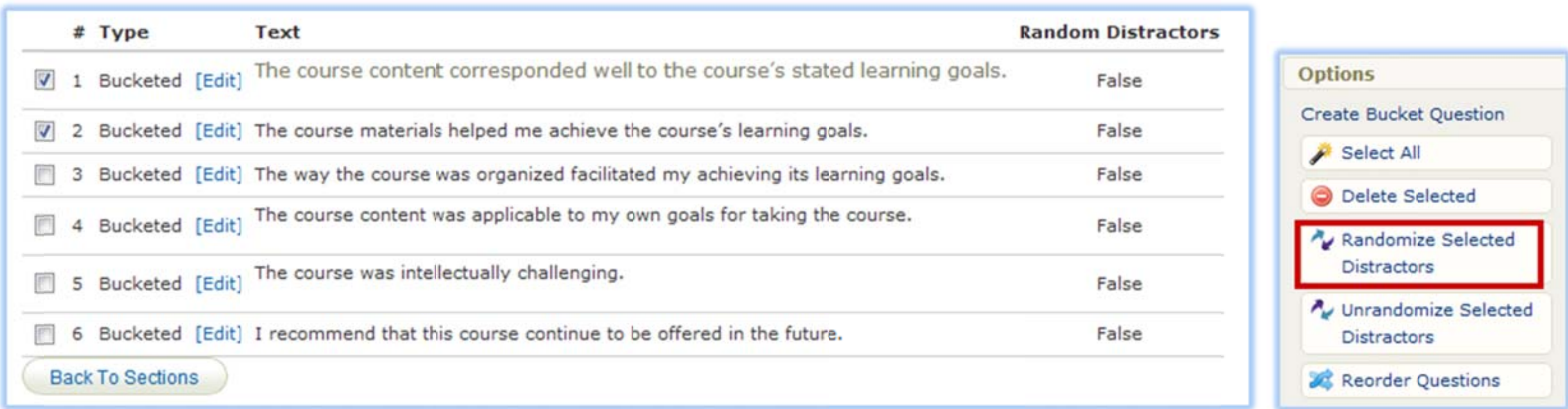
tool.



28.6.2 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 

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.



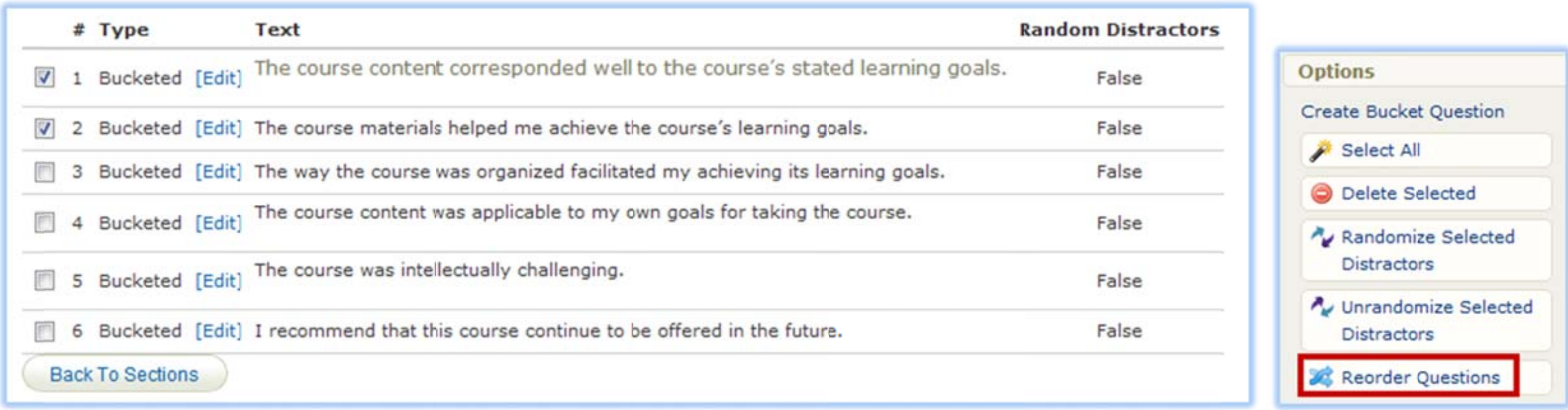
Unrandomize Question Distractors

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 

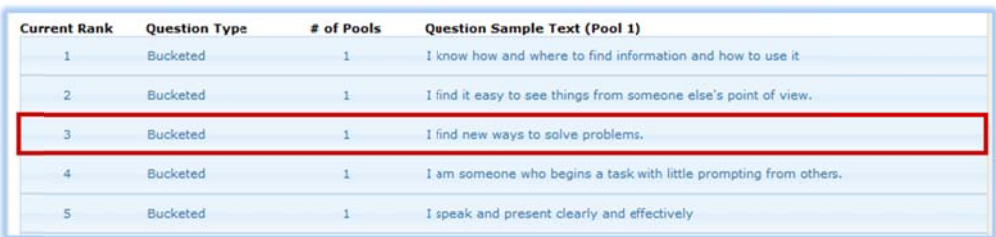
tool. This will present the distractors in the question in the default order in which you entered them.

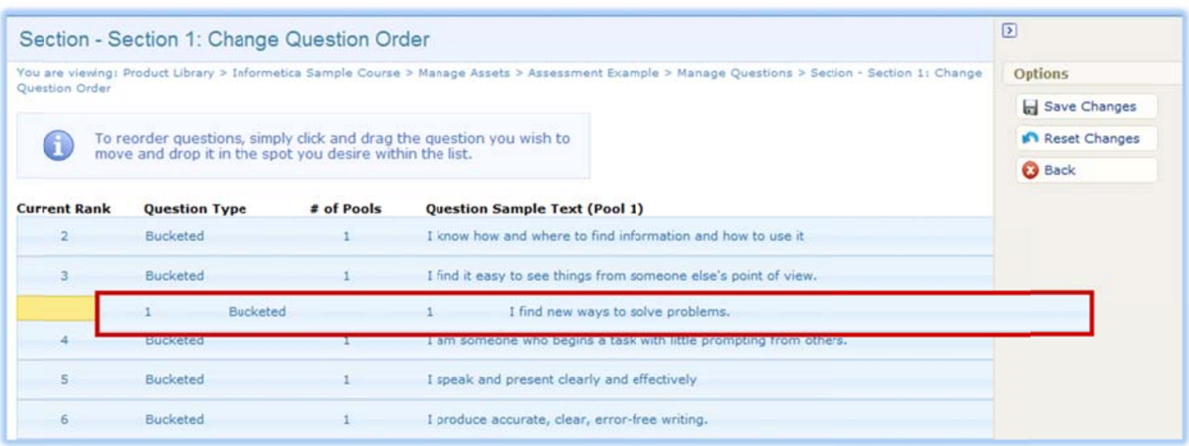
28.6.3 Reorder Questions

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. Review Questionnaire Results

28.6.4 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)

29. Appraisals

Topics Covered In This Chapter

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 are for manager use, so participants do not see appraisals among their list of offerings.

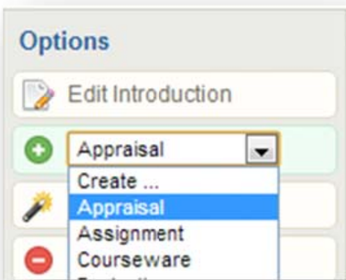
Appraisals use bucketed multiple choice questions. Every question is assigned one bucket, and every answer to a question can be assigned a certain number of points that go into its bucket. When a manager, publisher, or instructor appraises a participant, they are essentially assigning them a certain 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.

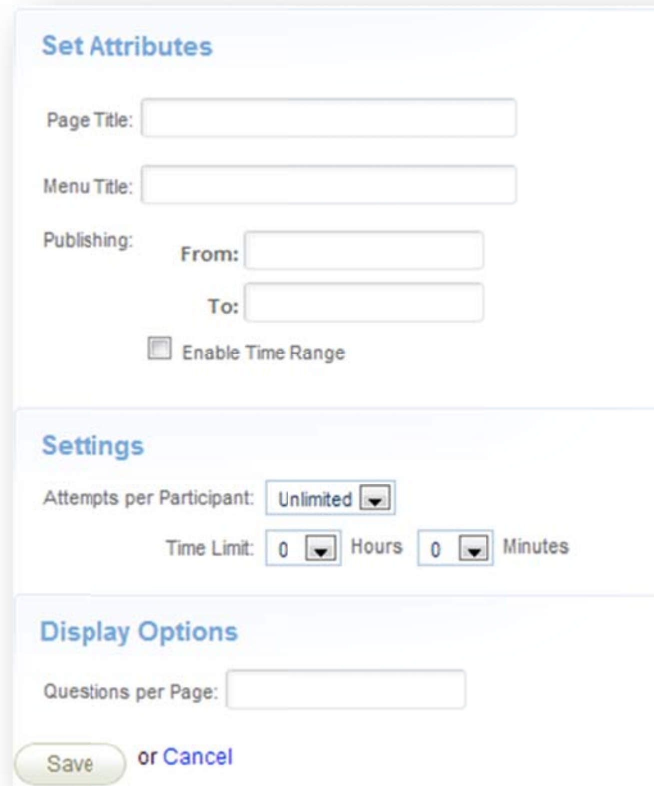
29.1 Create or Edit an Appraisal

To fully create an appraisal you must complete the following steps:

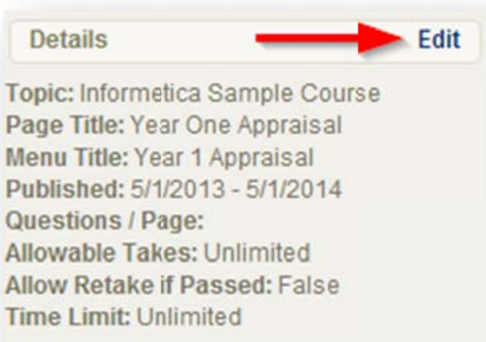
✓Create an appraisal ✓Create buckets ✓Create sections ✓Create questions for each section and assign to buckets

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



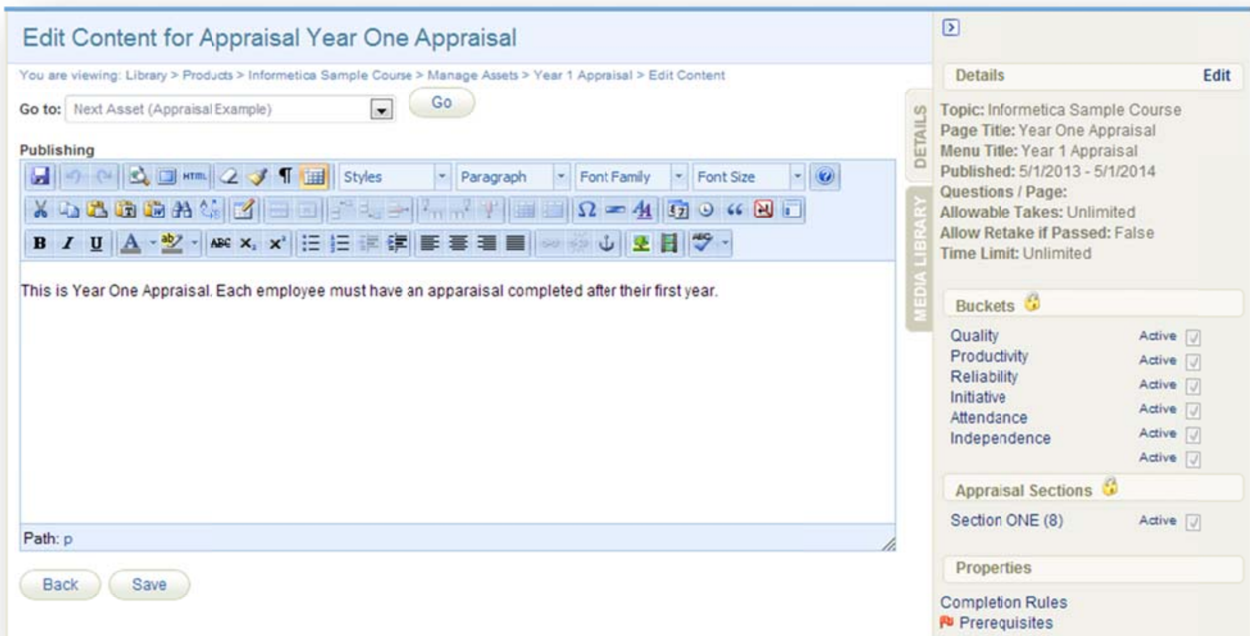
A brief description of the fields seen during creation

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

29.2 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.



29.3 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

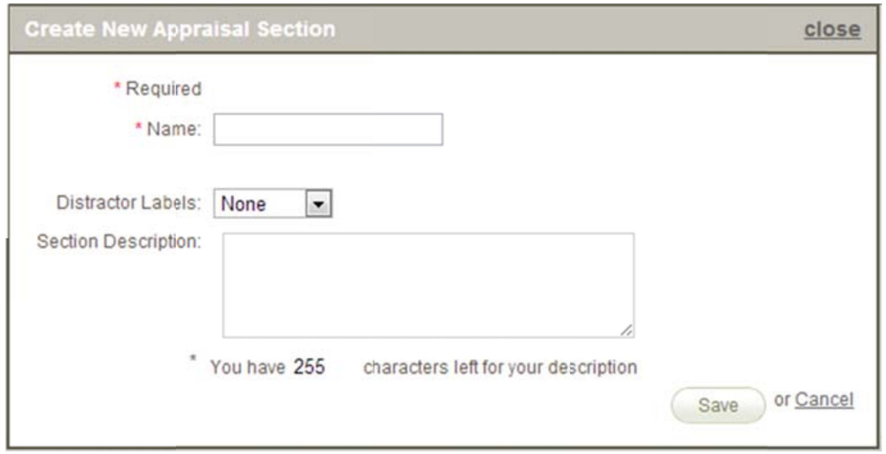
How to Edit a Bucket

Buckets cannot be edited, but you can create a new bucket, and then deactivate or delete an old one.

29.4 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.

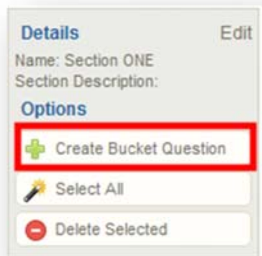
Brief description of the fields:

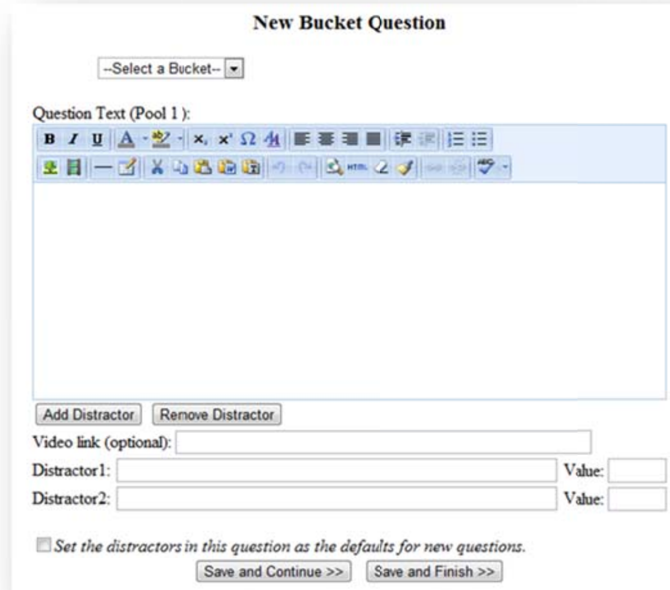
Field	Description	Input
Name	Enter a name for the section	Required
Distractor Label	Distractor labels precede the list of answers offered as choices for the participant so they can select an option. Use the drop down menu to select letters or numbers.	Optional
Section Description	Add an optional description 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

29.5 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**



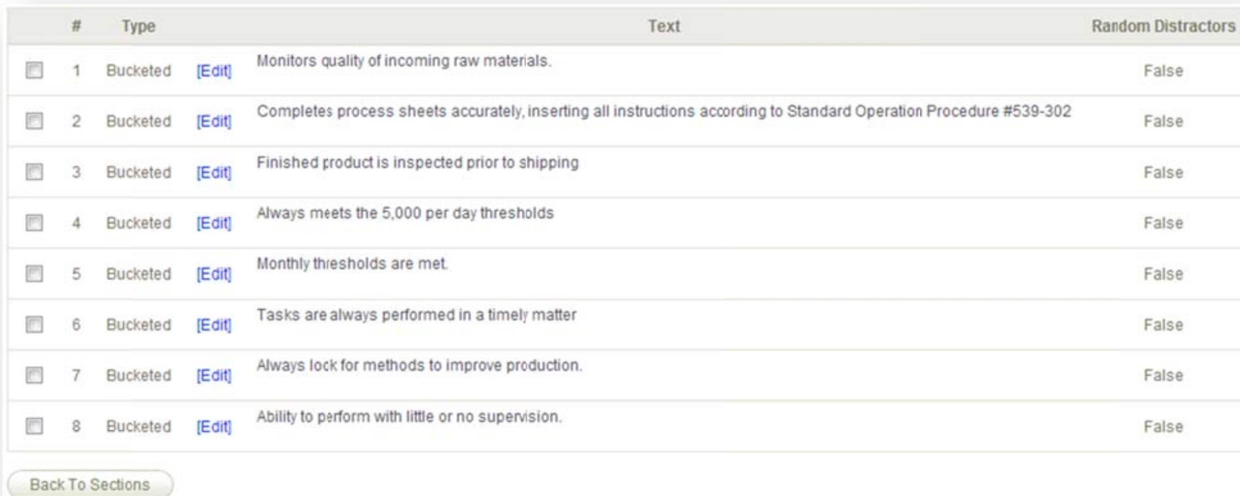


Brief description of the fields:

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

29.6 Manage Questions

1. Open the appraisal
2. Open a section to view questions
3. Edit and delete questions from the **Manage Questions** page



Bbrief description of the fields:

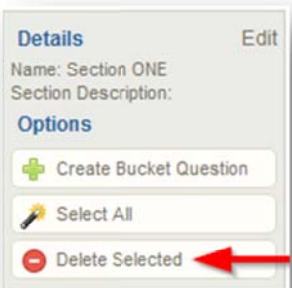
Field	Description
#	Appraisal questions are assigned an automatic number as you create them. This is the default order in which they are presented during an appraisal
Type	For appraisals, questions are always bucketed.
Text	The text of the question itself as the participant sees it.
Randomize Distractors	Randomization is turned off for Appraisals.

How Questions Are Displayed

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.

29.6.1 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

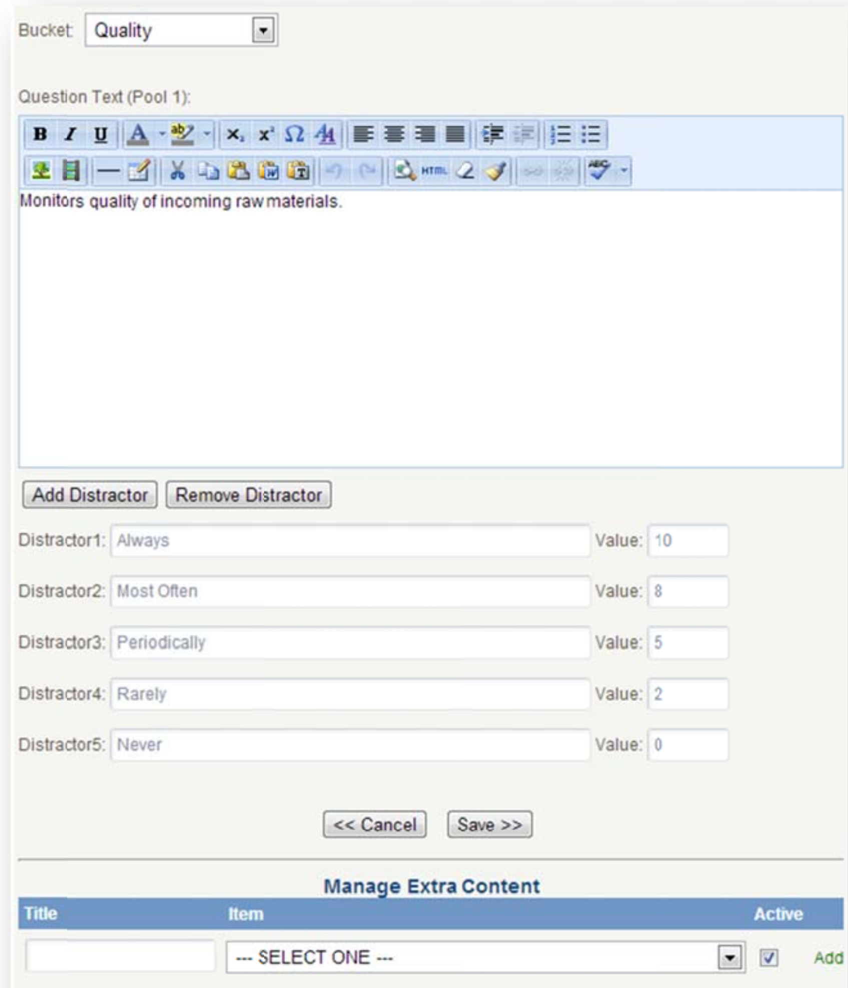


29.6.2 Edit Questions

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.

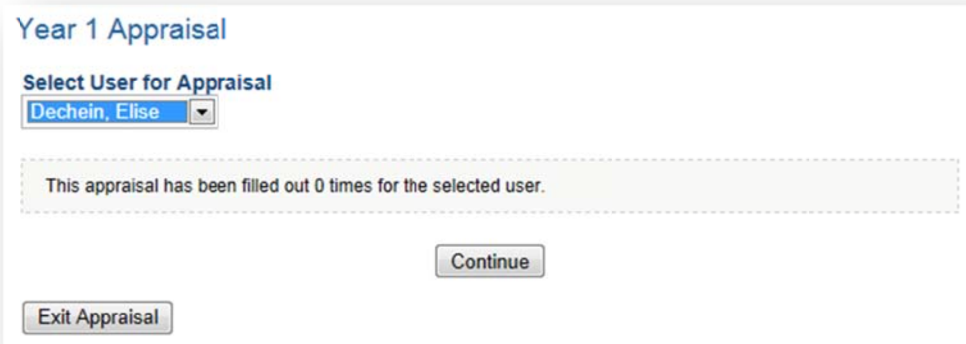


29.7 Completing an Appraisal

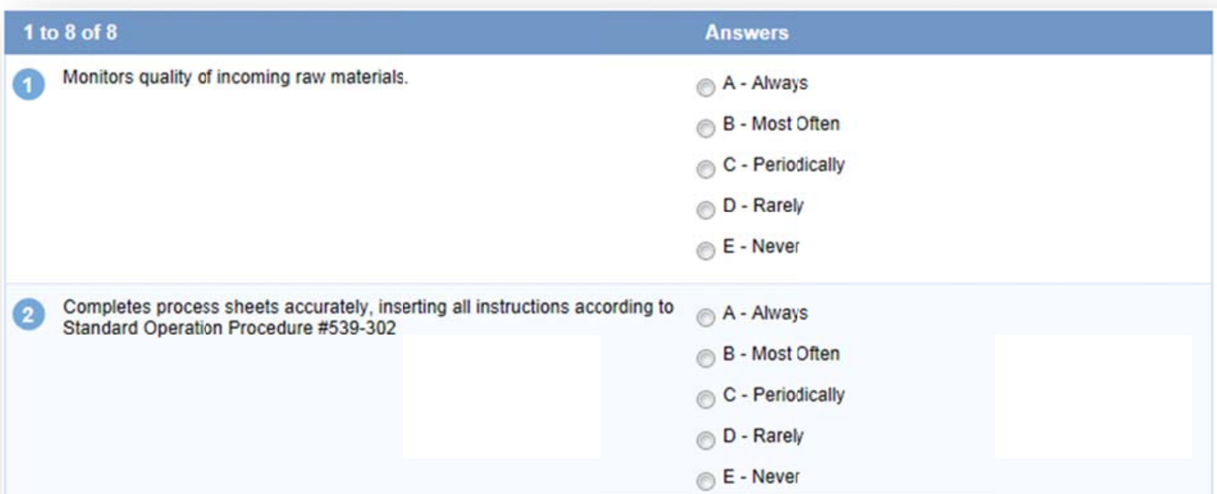
This feature is available to Campus Admins, Campus Managers, User Group Managers, Publishers, and Instructors, depending on system configurations.

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**



29.8 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)

30. Markup Documents and Wikis

Markup documents and wikis are two assets that participants can directly interact with.

Topics Covered In This Chapter

30.1 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:

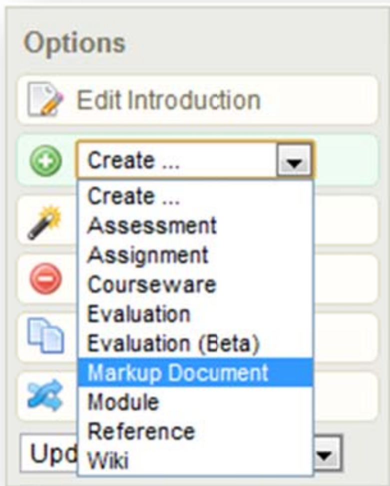
Step 1
- Create a markup document asset

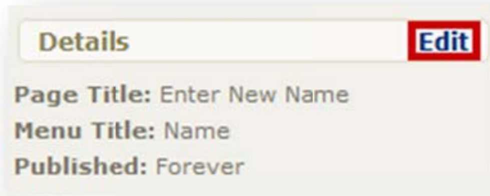
Step 2
- Create or copy/paste a document into the publishing window

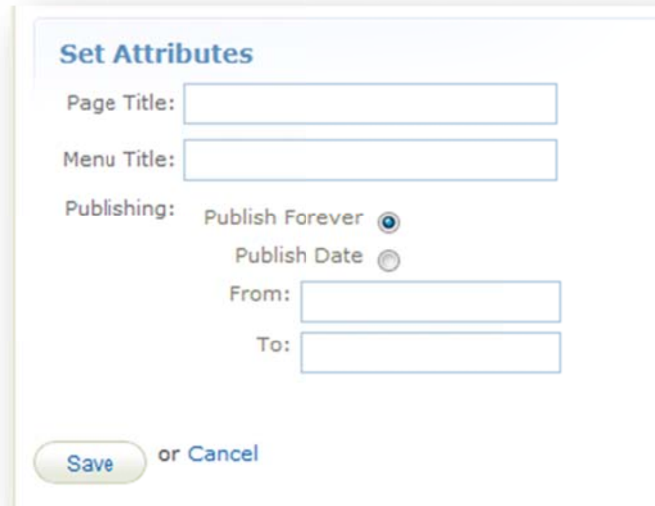
Step 3
- Set up the markup document's attributes and settings

30.1.1 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.







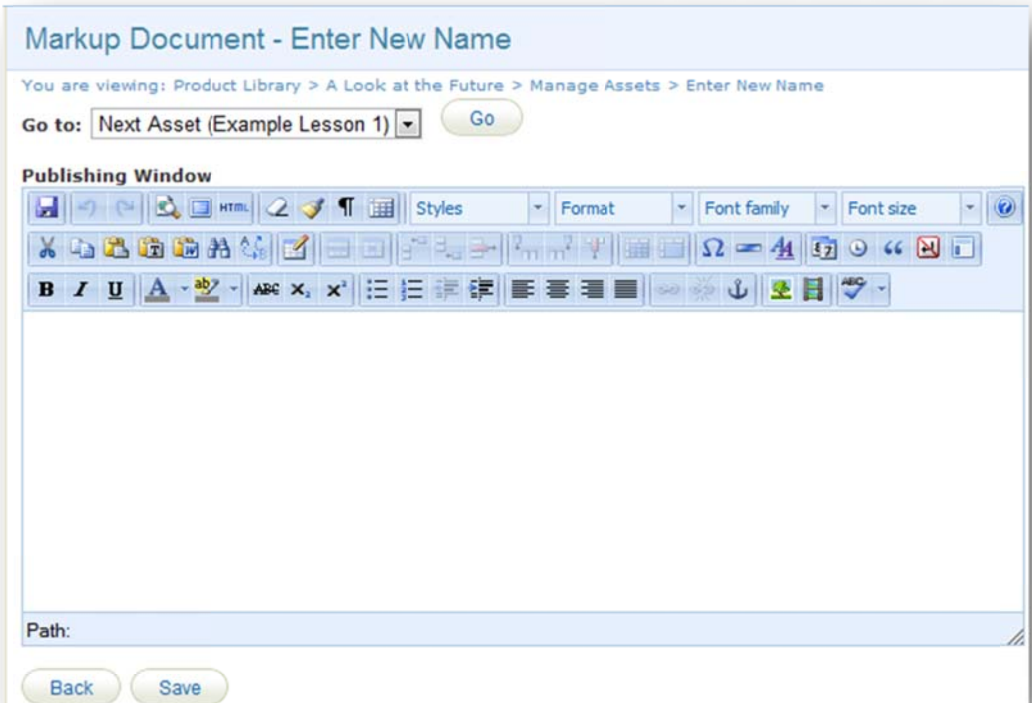
Below is a brief description of the fields:

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.

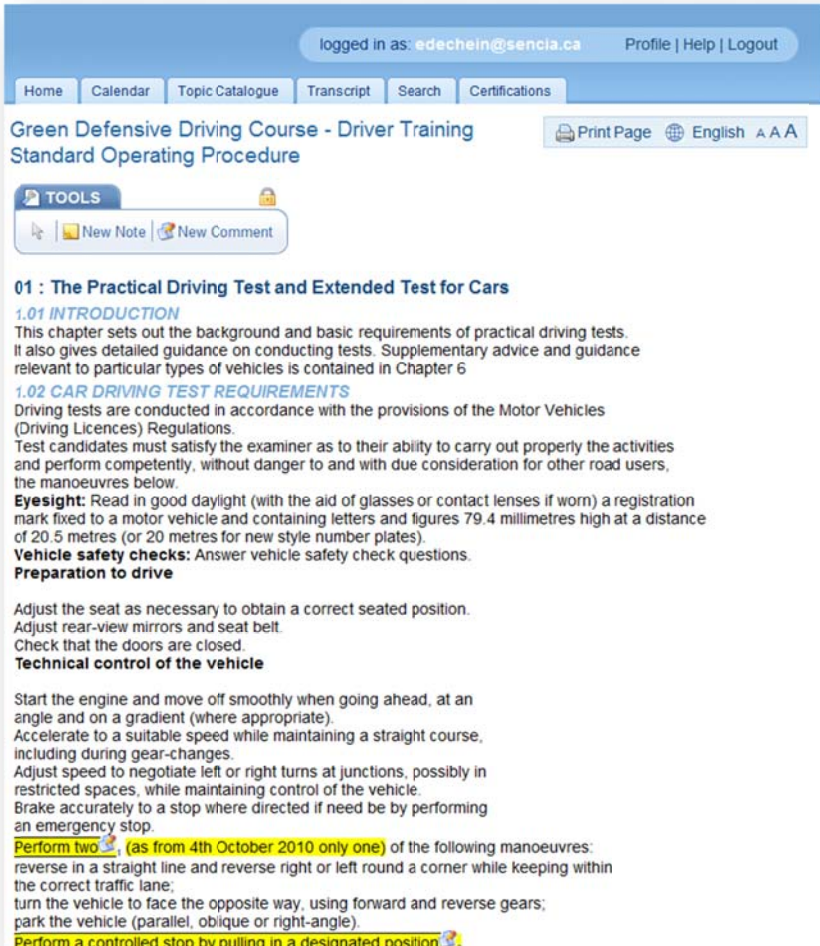
30.1.2 Add or Edit Content

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.



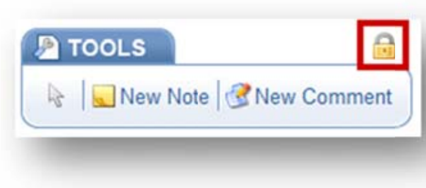
30.1.3 Markup Document Desktop View

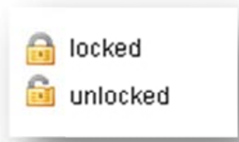
The process of using a markup document from the desktop of things as a user or participant is illustrated here to give a full overview of the markup document.



30.1.4 The Markup Tool

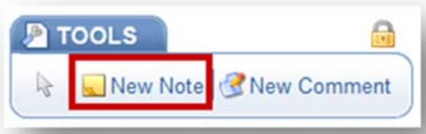
The markup document has a toolbar that allows users to add notes and comments to the document. You can move the toolbar around the content area so that it is not obstructing your view of the document. To do this, click on the lock icon to unlock it. When the toolbar is unlocked, you can click anywhere on it and drag to a new position on the screen.

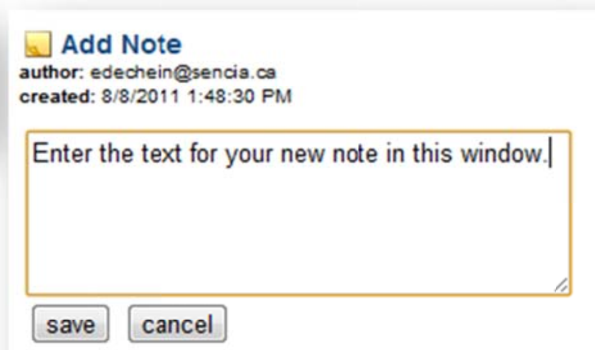


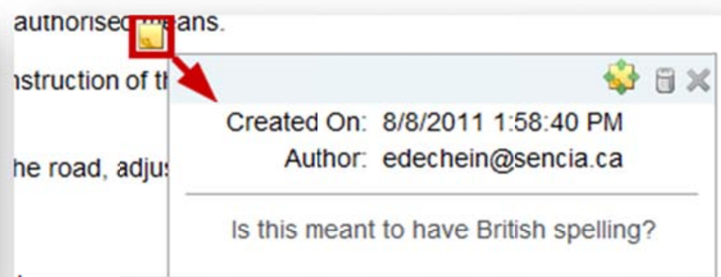


30.1.5 User Notes

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.

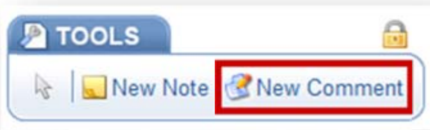


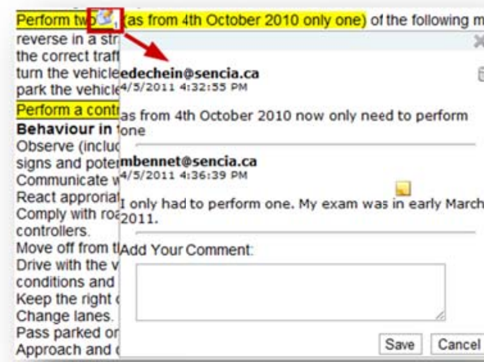




30.1.6 User Comments

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

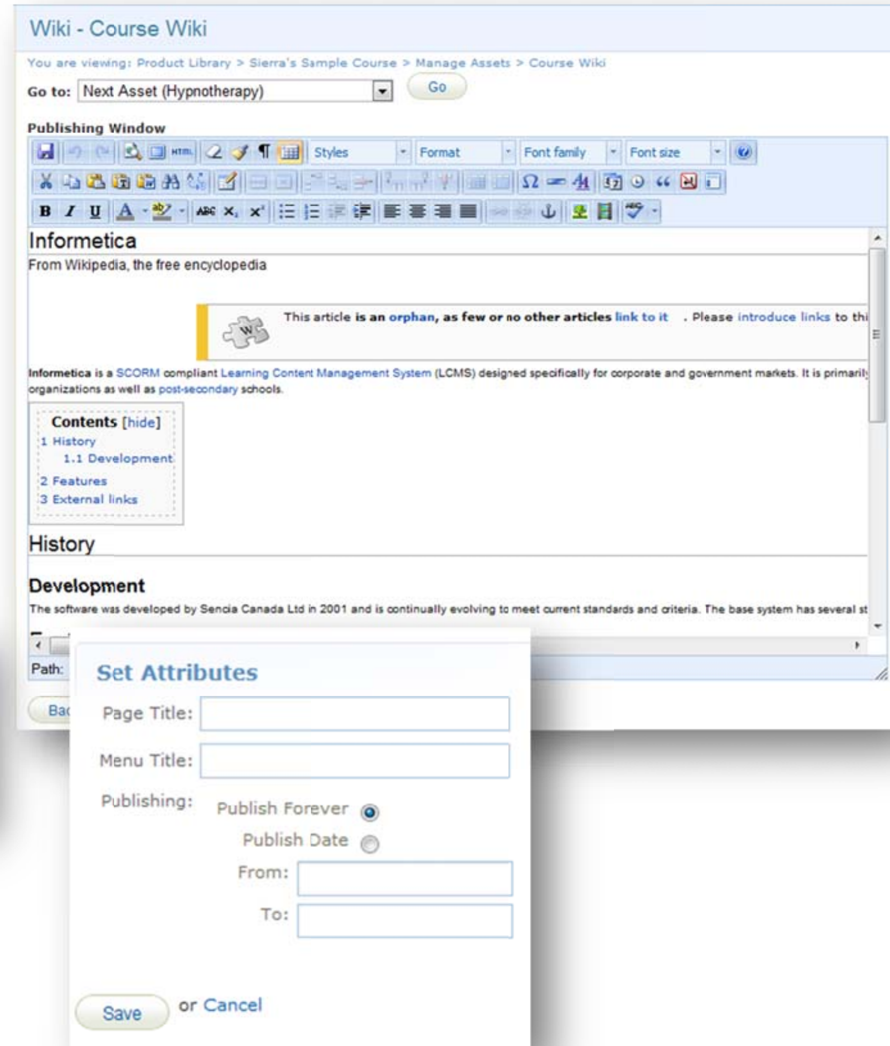
- Reposition note
- Delete note
- Close note

30.2 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.

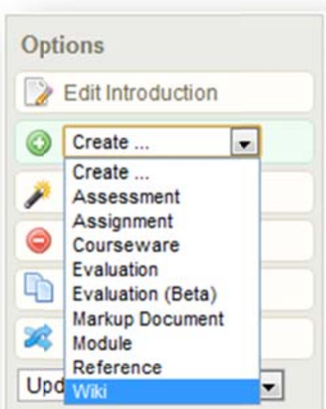
To fully create a wiki you will need to complete the following steps:

- ✓Create a Wiki
- ✓Set up the Wiki Attributes and Settings



30.2.1 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.



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.

30.2.2 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.

30.2.3 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.

31. Publishing Tools Guide

31.1 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.

31.2 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.

31.3 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.).