DAS
DEPARTMENT OF ADMINISTRATIVE SERVICES
HUMAN RESOURCE SERVICES DIVISION

iLearnOregon Training Management Module

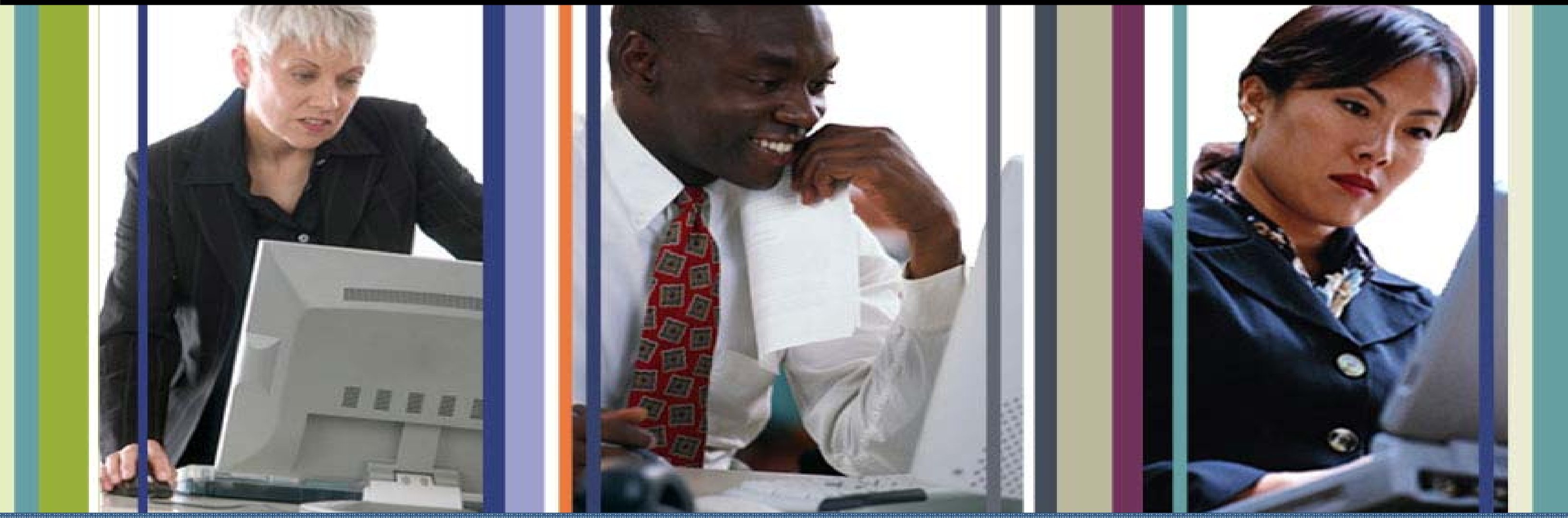

TABLE OF CONTENTS

Module Information

Module Name:	TRAINING MANAGEMENT
Module Topics:	1. Introduction to Training Management 2. Classroom Course Set-up 3. Classroom Courses 4. Online Courses 5. Instructor Tools 6. Reports
Module Introduction:	This module introduces the functions that allow a course manager to manage all aspects of a course. This includes topics such as setup of classroom courses, sections, and event details, supporting functions such as adding an instructor or survey to a course, class roster management, establishing pre-requisite structure, and curriculum management.
Module Objective:	After completion of this module, students will be able to manage courses.
Module Duration:	3.5 hours
Instructor Notes:	Target Audience: Course Managers, Instructors, and Classroom Course Managers.

Lesson Information

Lesson Name:	LESSON 1: INTRODUCTION TO TRAINING MANAGEMENT
Lesson Objectives:	Upon completion of this lesson, the learner will be able to: • Differentiate between the different types of roles and permissions that may be assigned when creating and managing courses. • Understand what options are available in the Manage Training function.
Lesson Introduction:	This lesson introduces the different roles that may take a part in managing a course.
Lesson Duration	15 minutes
Instructor Notes:	**Location**: Administration/Training Management. **Permission Level**: Requires membership in the Course Manager, AICC Course Manager, SCORM 1.2/2004 Course Manager, General Course Manager, Instructor, Classroom Course Manager, SCORM 1.2/2004 Test Manager, and Test Manager roles.

1.1 ROLES AND PERMISSIONS

Anyone assigned the Course Manager system role can add, edit, and delete **all** courses (online and classroom), curriculums, and tests. Based on the actions that the Course Manager takes when setting up a course, several automatic roles may be assigned to different users.

Automatic roles are created by the system based on a specific event. When a Course Manager creates a course they can assign the following automatic roles:

- *AICC Course Manager*: Users in this role are able to access the Manage AICC function. This role the user permission to create a new AICC course or to manage courses other than those for which given the manage permission. Users are automatically added to this role when granted permission specific AICC course.
- *Classroom Course Manager*: Users in this role are able to access the Manage Classroom function. This role does not give the user permission to create a new course or to manage courses other than those for which they are given the manage permission. Users are automatically added to this role when granted permission to manage a specific classroom course.
- *SCORM 1.2/2004 Course Manager*: Users in this role are able to access the Manage SCORM 1.2/2004 feature. This role does not give the user permission to create a new SCORM 1.2/2004 course or to manage courses other than those to which they are explicitly given the manage permission. Users are automatically added to this role when granted explicit permission to manage a specific SCORM 1.2/2004 course.
- *General Course Manager*: Users in this role are able to access the Manage General Courseware feature. Users are automatically added to this role when granted explicit permission to manage a specific general course. This role does not give the user permission to create a new general course or to manage courses other than those to which they are explicitly given the manage permission.
- *Instructor*: Can be assigned to classroom course section events. They also have access to Instructor Tools, where they can administer courses that they are assigned to teach.
- *SCORM 1.2/2004 Test Manager*: Users in this role are able to access the Manage Tests feature. This role does not give the user permission to create a new test, publish a test, or manage tests or published tests other than the published SCORM 1.2 tests to which they are explicitly given the manage permission. Users are automatically added to this role when granted explicit permission to manage a specific SCORM 1.2 test.
- *Test Manager*: Users in this role are able to access the Manage Tests feature. This role does not give the user permission to create a new test, publish a test, or manage tests or published test other than those tests to which they are explicitly given the manage permission. Users are automatically added to this role when granted explicit permission to manage a specific test.

1.2 MANAGE TRAINING FUNCTION

The Manage Training area is where authorized users create and manage training-related activities such as courses, curriculums and tests. You may also access and manage other items related to training such as training facilities, instructors, and tools for instructors.

This area contains the following options:

AICC	Create and manage AICC courses. Use the search feature to find and manage existing AICC courses.
SCORM 1.2	Create and manage SCORM 1.2 courses. Use the search feature to find and manage existing SCORM 1.2 courses.
SCORM 2004	Create and manage SCORM 2004 courses. Use the search feature to find and manage existing SCORM 2004 courses.
Classroom	Create and manage classroom courses. Use the search feature to find and manage existing classroom courses. Prior to creating events such as course sections, other information (i.e., training facilities, rooms, instructors) must be entered in the system because you will need to make the appropriate selections when creating and editing course events.
Course Provider	Create and manage course providers.
Training Facilities	Create and manage training facilities and rooms within training facilities.
Instructors	Search for existing instructors and edit information about them, and add new instructors.
Instructor Tools	View the calendar for classroom course sections. Search for courses in order to edit scores, view the roster, send emails, assign section surveys and launch/manage the section's collaboration space.
Curriculums	Create and manage curriculums.
Tests	Create and manage tests. After tests are created, they can be published so that users may take them.

1.3 ACCESS APPROVAL PATHS

Access approval paths are used when you want to restrict access to a course.
When a user requests access to a course, the request is sent to the appropriate user(s) in the approval path assigned to that course. Approval paths can be assigned to any course within the system. Approval paths are based on the system and automatic roles assigned to a user. Any user who has 1 or more of the system or automatic roles assigned to them may be responsible for approving access requests.

Lesson Information

Lesson Name:	LESSON 2: CLASSROOM COURSE SETUP
Lesson Objectives:	Upon completion of this lesson, the learner will be able to: • Add Training Facilities. • Add instructors. • Create a course survey. • Create a course test.
Lesson Introduction:	This lesson introduces the functions involved in setting up an instructor-led course in the LMS.
Lesson Duration:	45 minutes
Instructor Notes:	**Location**: Administration/Training Management. **Permission Level**: Requires membership in the Course Manager role.

The following items must be entered in the system prior to actually creating a classroom course:

- Training Facilities
- Instructors
- Surveys
- Tests

It is important to set up the related functions first because they need to be available to select later when the course structure is defined. Once all of the course-related functions are set up and/or verified, then the course structure can be defined.

2.1 TRAINING FACILITIES

Before creating a classroom course, perform a search in "Training Facilities" to ensure that the facility you need for the classroom course is in the system. If it is not, then you need to create them. Also, training facilities have rooms, and rooms may or may not have equipment. You need to add rooms and equipment to the facility if these items have not already been added.

2.1.1 SEARCH FOR A FACILITY

To find a facility using Simple search:

1. Click Administration.
2. Click the plus sign next to "Manage Training."
3. Click Training Facilities.
4. Type a keyword or phrase in the Search Text field.
5. Change the search type in the Search Type menu. (Optional)
6. Click Search to view a list of facilities that match your search criteria.
   The search results display alphanumerically and may include paging.
7. Review the list of search results and find the facility you are looking for.
   Click the Information icon to the left of the facility to view summary information.
8. If you don't see the facility you need you will need to add the facility to the site.

2.1.2 CREATE A FACILITY

To create a new training facility:

1. Click Administration.
2. Click the plus sign next to "Manage Training."
3. Click Training Facilities.
4. Select "Create New" from the Page menu.
5. Click Go.
6. Complete the form by entering data in the fields as explained below. *All required fields are marked with an * asterisk.*

FIELD	DESCRIPTION
*Name	The name of the facility.

*Description	An explanation/statement about the facility. Enter words that the facility's description may contain.
*Keywords	Words and phrases that relate to the facility that may not already be included in the title or description.
*Facility Type	The category (type) in which the facility is grouped. Example categories are hotels and offices.
*Address	The location of the facility. Character limit: 100.
*City	The name of the city in which the facility is located. Character limit: 100.
*State	The name of the state in which the facility is located.
Province	The name of the province in which the facility is located. Character limit: 100.
*Country	The name of the country in which the facility is located.
*Postal Code	The Postal (Zip) Code of the area in which the facility is located. Character limit: 20.
Complex	The collection of facilities in which this facility is located. Further defines the location of the facility, relative to nearby facilities. An example of a complex is a college campus.
Contact Name	The point of contact if there are questions or issues regarding the facility.
Contact Phone	The phone number for the point of contact.
Contact Fax	The fax number to use to send information to the point of contact.
Contact Email	The email to use to send an email to the point of contact.
Additional Information	Any other details you want to include about this facility.

7. Click Create. The Manage Rooms tab displays. This is where you create and edit rooms in the training facility. Note*:* At this point the training facility is visible in the system for users. Continue with this procedure to create rooms for the facility, as rooms are selected when creating classroom course sections.

To create a new room:

8. Select Create New from the Page menu and click Go.
9. Complete the form by entering data in the fields as explained below. *All required fields are marked with an * asterisk*.

FIELD	DESCRIPTION
*Name/Number	The name and/or number of the room.
*Description	An explanation of the room (e.g., what it can be used for, what equipment it contains).
*Keywords	Words and phrases that relate to the room that may not already be included in the name or description. When choosing keywords, think of words that a user would type into the search field when trying to find this room.
*Room Type	The category in which the room is grouped.
*Capacity	The most people that may occupy the room at one time.
Additional Information	Any other details you want to include about this room.

10. Enter summary information about the room. At a minimum, the required information (indicated by an asterisk - *) must be entered.
11. Click Create. The Manage Rooms tab displays and the room you created is listed on this tab.

To add new equipment to a room:

12. Select "Select Equipment" from the Action menu and click Go. The Select Equipment page displays.
13. Select an equipment type from the Equipment Type menu.
14. Type a numeric value that indicates how many of the equipment type are in the room in the Quantity field.
15. Type information about the equipment type in the Notes area. (Optional)
16. Click Add Equipment. The equipment type is displayed in the table at the bottom of the tab and a message above the tab indicates the equipment was added to the room.
17. Click Rooms to access the Manage Rooms tab and continue to create more rooms and add equipment. (Optional)

To set an activity:

18. Select the Edit Activity tab.
19. Click the button next to "Inactive" or "Active." The "Active" button is selected by default.
20. Click the calendar icon to select a date or use the menus and the Year field to enter the Start Date. (Optional)
21. Click the calendar icon to select a date or use the menus and the Year field to enter the End Date. (Optional)
22. Click Save (message displays indicating the activity was saved). Click another workflow step to continue making changes or click Return to go back to the previous page.

To share the facility with other domains:

23. Click the Content shared to other domains button. The checkboxes in the table are enabled.
24. Click the appropriate checkboxes in the table to place checkmarks in them and indicate how the content will be shared. If the content is already shared and you want to unshare it, click the checkboxes to remove the checkmarks. Note: For each domain, only one option can be checked.
25. Click Save.

26. Click Return to go back to the previous page.
27. Select the Check In tab when you have completed creating the glossary term so that users may access it, and the "Available" icon displays for the glossary term in the Editing Status column in search results.

2.2 INSTRUCTORS

Before creating a classroom course perform a search in "Instructors" to ensure that the instructors you need for the classroom course are in the system. If they are not, then you need to request an administrator to add them to the system.

Manage Instructors allows you to find existing instructors, add or delete instructors, and make changes to information about instructors. Instructors are users who are qualified to teach classroom course sections.

When an instructor is deleted, they are removed from the Instructor role and will no longer have access to any features that are available to users in the Instructor role.

2.2.1 SEARCH FOR AN INSTRUCTOR

To find an existing instructor:

1. Click Administration.
2. Click the plus sign next to "Manage Training."
3. Click Instructors.
4. Type all or part of a last name, first name or both into the designated fields on the Search tab.
5. Click Search to view a list of instructors that match your search criteria.
6. The search results display alphanumerically and may include paging.
7. Review the list of search results and locate the name of the instructor you are looking for.
8. Click the Information icon to the left of the user's name to open the Information window and view his/her profile information.
9. Once you locate an instructor you can chose one of the following options:
   - *Send Email*: Send an email to the instructor.
   - *Manage*: Edit information about the instructor (e.g., experience, courses, facilities in which the instructor teaches)
   - *View Schedule*: View the instructor's schedule.

If the instructor is not listed you will need to do 1 of the following actions:

- Add a user as an instructor (go to 2.2.2); or
- Request that an administrator creates a new user account in the system and then add the user as an instructor.

2.2.2 ADD A USER AS AN INSTRUCTOR

To add a user as an instructor:

1. Click Administration.
2. Click the plus sign next to "Manage Training."
3. Click Instructors.
4. Select "Add Users" from the Page menu.
5. Click Go.
6. Type all or part of the last name of the user you want to add in the Last Name field. (Optional)
7. Type all or part of the first name of the user you want to add in the First Name field. (Optional)
8. Click Search. A list of users matching your search criteria displays.
9. The search results display alphanumerically and may include paging.
10. Click the checkbox next to the user you want to add. You may select multiple checkboxes.
11. Click Add Selected. A message displays at the top of the page indicating the user(s) was added, and the user(s) is no longer displayed in the search results.
12. Repeat the two previous steps for more users on other search results pages (if there are more search results pages). (Optional)
13. Click Return to go back to the Search tab. The users you added will now be displayed in search results for instructors.

Now that the instructor is available you will be able to assign them to a classroom course.

2.3 SURVEYS

Surveys are created and published in the Manage Content area under Administration. If you only have the Course Manager role then you will need a Content Manager or an Administrator to create the survey.

When creating a survey, if you choose to make it a content survey, it will not be available in the Reference Center. It will only be available when an authorized user searches for surveys to associate with a content item.

2.3.1 WORKFLOW FOR CREATING A SURVEY

The workflow for creating a new survey consists of the following:

1. *Edit Summary*: Summary information allows users to easily find the survey when they perform searches. This information includes the title of the survey, the description of the survey, keywords, and the survey type.

2. *Edit Structure*: This is where you create, edit, reorder, and delete survey sections contained in the survey. You have two options in the Page menu: Create New Section and Link Existing Section. Create New Section is where you enter summary information about a section (allows the section to be found when users perform a search for survey sections) in order to create the section. Link Existing Section allows you to search for existing survey sections and select the sections that you want placed in your survey. You may reorder sections using the menus in the Order column at any time prior to publishing the survey. After publishing a survey, the questions, sections and associated survey scales cannot be changed and published again. Also, you may not reorder or delete sections, and the Action menu for sections are disabled after the survey is published.

3. *Select Categories*: This is where you choose which category or categories contain this content. Categories are used to organize content within the system.

4. *Edit Window Attributes*: This is where you specify the window dimensions and other aspects of the window (e.g., presence of toolbars, ability to resize the window) in which the content displays.

5. *Assign Permissions*: This is where you search for roles, users, and organizations to assign a permission to view, launch, or manage a survey. Roles, organizations, and users already assigned a permission for the survey are displayed in a list at the bottom of the Edit Permissions tab. Existing permissions are also displayed in the list. Permissions can be changed at any time.

6. *Edit Survey Activity*: In order to make a survey active or inactive you must complete the Edit Activity workflow step. By default, after creating a new survey it is automatically active for an indefinite period of time. Therefore, you only access this workflow step if you want to change the values. Inactive survey are stored in the system and are only viewable or searchable by authorized users when specifically searching for it using the Advanced search.

7. *Share the Survey*: This is where you indicate how your survey is shared. By default, when a survey is created, it exists in the creating domain only. It is not shared or pushed unless you access the Content Sharing tab.

2.3.2 CREATE A SURVEY

To create a survey:
1. Click Administration.
2. Click the plus sign next to "Manage Content."
3. Click Surveys.
4. Select "Create New" from the Page menu.
5. Click Go.
6. Complete the form by entering data in the fields as explained below. *All required fields are marked with an * asterisk.*

FIELD	DESCRIPTION
*Title	The name of the survey.
*Description	An explanation of the survey.
*Keywords	Words and phrases that relate to the survey that may not already be included in the title or description. When choosing keywords, think of words that a user would type into the search field when trying to find the survey.
*Survey Type	Select whether the survey you are creating/editing is a content survey (can be linked to a course or content item) or a site survey (a standalone survey accessible in the Library).

7. Click Create.
8. From the Edit Structure page there are 2 options in the drop down menu: create a new section or link to an existing section. Select what action you want to take and click Go.

Note: You have to create at least 1 section for every survey. Each section only allows you to use 1 type of survey scale for every question you add to the section.

To create a new section:

9. Type a title for the section in the Title field.
10. Type a description of the survey in the Description field.
11. Type keywords that users would most likely use when searching for this survey section.
12. Select a survey scale from the Scale menu. Click "View Selected Scale" to view the survey scale and confirm it is the scale you want to use.
13. Click Save. The Edit Structure tab displays with a message indicating the section was created. The survey section you created is displayed at the end of the list of section titles.

To link existing sections to your survey:

14. Type a keyword or phrase in the Search Text field to find a survey section.
15. Change the search type in the Search Type menu. (Optional)
16. Click Search to view a list of survey sections that match your search criteria.
17. The search results display alphanumerically and may include paging.
18. Click the checkbox next to the section you want to link to your survey. Multiple sections may be selected.
19. Click Select. The Edit Structure tab displays with a confirmation that the section was linked to your survey, and the section displays at the bottom of the table.

To create new questions:

20. Select Create New Question from the Page menu.
21. Click Go. The New Question tab displays.
22. Type a question in the Question field.
23. Select a question type from the Type menu. Multiple choice means there will be several choices and the user picks one, and Short Answer means a text field is available for users to type their answer.
24. Click Create. The Manage Questions tab displays with a message indicating the question was created and added to your survey section.

To link existing questions:

25. Select Link Existing Questions from the Page menu.
26. Click Go. The Link Existing Questions tab displays.
27. Type a keyword or phrase in the Search Text field, change the search type in the Search Type menu and click Search.
28. Click the checkbox next to the question or questions you want to link to your survey section (see Link Existing Questions for details about this tab).
29. Click Select. The Manage Questions tab displays with the question(s) you added.

To select categories for the survey:

30. Click the plus (+) sign to expand the tree and view the available categories.
31. Click the checkbox next to a category for the content. You may select multiple categories.
32. Click Save if you are going to continue making changes using other workflow steps (message displays indicating the category was saved) or click Return to go back to the previous page.

To edit window attributes:

33. Select "Yes" for attributes that you want displayed in the window or select "No" for attributes you do not want displayed (see explanations below).
34. Change the width of the window in the Width field. This value must be in pixels.
35. Change the height of the window in the Height field. This value must be in pixels.
36. Click Preview to view what the window will look like based on your selections.
37. Continue changing the attributes and previewing them until you are satisfied.
38. Click Save if you are going to continue making changes using other workflow steps (message displays indicating the attributes were saved) or click Return to go back to the Search page.

To add permissions for a role/organization/user:

39. Search for users by name, role or organization to add to this permission. Enter search criteria in the fields and click Search.
40. Click the checkboxes to either place checkmarks in, or remove checkmarks from, the checkboxes in the View/Launch/Manage columns next to the entity(ies) for which you want to change permissions. You may change permissions for multiple entities at the same time.
41. Click Save. A message displays at the top of the page indicating the permissions were updated.
42. Click Return to go back to the Search page for glossary term or click another workflow step.

To set an activity:

43. Select the Edit Activity tab.
44. Click the button next to "Inactive" or "Active." The "Active" button is selected by default.
45. Click the calendar icon to select a date or use the menus and the Year field to enter the Start Date. (Optional)
46. Click the calendar icon to select a date or use the menus and the Year field to enter the End Date. (Optional)
47. Click Save (message displays indicating the activity was saved). Click another workflow step to continue making changes or click Return to go back to the previous page.

To share the survey with other domains:

48. Click the Content shared to other domains button. The checkboxes in the table are enabled.
49. Click the appropriate checkboxes in the table to place checkmarks in them and indicate how the content will be shared. If the content is already shared and you want to unshare it, click the checkboxes to remove the checkmarks. Note: For each domain, only one option can be checked.
50. Click Save.
51. Click Return to go back to the previous page.
52. Select the Check In tab when you have completed creating the glossary term so that users may access it, and the "Available" icon displays for the glossary term in the Editing Status column in search results.

2.4 TESTS

Manage Tests is where authorized users create, edit and delete tests. Tests consist of question groups, and question groups consist of test questions. After tests are created, they can be published, which is a specific instance of a test that includes additional parameters such as mastery score and number of attempts. Users access the published tests from the Tests area in the Learning Center.

2.4.1 SEARCH FOR A TEST

To search for a test:
1. Click Administration.
2. Click the plus sign next to "Manage Training."
1. Click Tests.
2. Type a keyword or phrase in the Search Text field. (Optional)
3. Change the search type in the Search Type menu. (Optional)
4. Click Search to view a list of tests that match your search criteria.
5. The search results display alphanumerically and may include paging.
6. Review the list of search results and find the test you are looking for.
7. Click the Information icon to the left of the title of the test to view summary and review information.
8. The following options are available on the Action menu:
   - *Manage*: Make changes to the test (e.g., Edit Summary, Edit Activity).
   - *Lock Test* (only displays if test has not been locked in order to be used to create published tests): Locks the test against any further changes to the structure (groups and questions cannot be edited, added or removed). The test becomes available to be published, which is accessible by users. The system checks the groups and questions - e.g., if the group was intended to have three questions, then the system ensures that the group has three questions; if there is a multiple choice question, the system ensures that at least one choice was selected as the correct answer.
   - *Publish SCORM 1.2* (only displays if test has been locked): Access the workflow for creating a new published test that matches the SCORM 1.2 standard.
   - *Publish SCORM 2004* (only displays if test has been locked): Access the workflow for creating a new published test that matches the SCORM 2004 standard.
   - *Copy*: Make a copy of the test. By default, the new copy of the test is active (no start or end date) and is not locked.

2.4.2 CREATE A TEST

To create a test:
1. Click Administration.
2. Click the plus sign next to "Manage Training."
3. Click Tests.
4. Select "Create New" from the Page menu.
5. Click Go.
6. Complete the form by entering data in the fields as explained below. *All required fields are marked with an * asterisk*.

FIELD	DESCRIPTION
*Title	The name of the test.
*Description	An explanation of the test.
*Keywords	Words and phrases that relate to the test that may not already be included in the title or description. When choosing keywords, think of words that a user would type into the search field when trying to find the test.

7. Click Create. The Edit Structure tab displays. This is where you add groups that contain questions. All tests are made up of groups of questions.

To create a new group of questions:
8. Select "Create New Group" from the page menu.
9. Click Go. The Edit Question Group tab displays.
10. Type a new or change the existing title in the Title Field.
11. Type a new or change the existing description in the Description field.
12. Type new or change the existing keywords in the Keywords field.
13. Preview the information by clicking the Preview tab. (Optional)Type a numeric value indicating the total number of questions for the group in the Number of Questions field.
14. Click Create if creating a new question group (Edit Activity tab displays).
15. Click Save or Return if editing an existing question group.

To copy a existing group of questions:
16. Select "Add Existing Group" from the page menu.
17. Click Go. The Edit Question Group tab displays.
18. Type a keyword or phrase in the Search Text field. (Optional)Change the search type in the Search Type menu. (Optional)
19. Click Search to view a list of question groups that match your search criteria.
20. The search results display alphanumerically and may include paging.
21. Click the checkbox in the "Copy" column for the question group that you want to copy. You may select multiple checkboxes to copy multiple question groups.
22. Click Select. The Edit Structure tab displays and the question group(s) you copied are displayed in the table on the tab.

To link an existing group of questions:
23. Select "Add Existing Group" from the page menu.
24. Click Go. The Edit Question Group tab displays.
25. Type a keyword or phrase in the Search Text field. (Optional)
26. Change the search type in the Search Type menu. (Optional)
27. Click Search to view a list of question groups that match your search criteria.
28. The search results display alphanumerically and may include paging.
29. Click the checkbox in the "Link" column for the question group that you want to copy. You may select multiple checkboxes to link multiple question groups.
30. Click Select. The Edit Structure tab displays and the question group(s) you linked is displayed in the

table on the tab, along with an indicator so that you know the question group was linked as opposed to copied.

To add permissions for a role/organization/user:

31. Search for users by name, role or organization to add to this permission. Enter search criteria in the fields and click Search.
32. Click the checkboxes to either place checkmarks in, or remove checkmarks from, the checkboxes in the View/Launch/Manage columns next to the entity(ies) for which you want to change permissions. You may change permissions for multiple entities at the same time.
33. Click Save. A message displays at the top of the page indicating the permissions were updated.
34. Click Return to go back to the Search page for glossary term or click another workflow step.

To set an activity:

35. Select the Edit Activity tab.
36. Click the button next to "Inactive" or "Active." The "Active" button is selected by default.
37. Click the calendar icon to select a date or use the menus and the Year field to enter the Start Date. (Optional)
38. Click the calendar icon to select a date or use the menus and the Year field to enter the End Date. (Optional)
39. Click Save (message displays indicating the activity was saved). Click another workflow step to continue making changes or click Return to go back to the previous page.

To share the test with other domains:

40. Click the Content shared to other domains button. The checkboxes in the table are enabled.
41. Click the appropriate checkboxes in the table to place checkmarks in them and indicate how the content will be shared. If the content is already shared and you want to unshare it, click the checkboxes to remove the checkmarks. Note: For each domain, only one option can be checked.
42. Click Save.
43. Click Return to go back to the previous page.

To publish a test:

44. Locate the test you just finished creating. Select Lock Test from the Action menu for the test and click Go.
45. Click OK in the confirmation window. The system checks the test for general problems (e.g., not having the correct number of questions in a group, not having a choice selected as a correct answer). The test is now locked against any changes. Note*:* If any problems are identified, the system lets you know what they are so you may correct them.
46. Select Publish SCORM 1.2 or Publish SCORM 2004 from the Action menu for the test and click Go. The workflow for a published test displays. Note*:* The difference between these selections is deciding whether you want the test to be published as SCORM 1.2-compliant or SCORM 2004-compliant (the workflow for both formats is the same).
47. Review summary information about the published test and make changes. (Optional)
48. Enter the highest score a student may receive if they answer all of the questions correctly in the Mastery Score field (only available when creating a published test, not when editing).
49. Click the Comments tab to add comments about the published test. (Optional)

50. Click the Preview tab to view the summary information you entered. (Optional)
51. Click Create. The Select Categories tab displays. **Note**: At this point, the published test has been created and is available for users to take in the Learning Center. The additional steps in the workflow only need to be accessed if you want to make changes to default settings.
52. Select a category or categories for the published test. (Optional - Access this step if you want to place the test in one or more categories. See Select Categories for details about this tab.)
53. Click Save.
54. Click Window above the Select Categories tab to access the Edit Window Attributes tab and make changes. (Optional - Access this step if you want to make changes to the default window in which the test displays. See Edit Window Attributes for details about this tab.)
55. Click Permissions above the Edit Window Attributes tab to access the Edit Permissions tab and make changes. (Optional - Access this step if you want to assign permissions or make changes for existing users with permissions. See Edit Permissions for details about this tab.)
56. Click Access Approval above the Edit Permissions tab to access the Access Approval tab and make changes. (Optional - Access this step if you want users to have to request access to the test. See Access Approval for details about this tab.)
57. Click Activity above the Access Approval tab to access the Edit Activity tab and make changes. (Optional - Access this step if you want to change the default activity for this published test. See Edit Activity for details about this tab.)
58. Click Check In (if your system has manual check-in).
59. Click Return to go back to the main Search page for tests.

Lesson Information

Lesson Name:	LESSON 3: CLASSROOM COURSES
Lesson Objectives:	Upon completion of this lesson, the learner will be able to: • Create a classroom course, section, and event. • Edit a classroom course.
Lesson Introduction:	This lesson introduces the functions involved in setting up an instructor-led course in the LMS. To ensure understanding of the classroom course setup the learner will see how to create the course structure, establish the sections for the course and attach the related events. Other tasks related to classroom course setup, such as setting permissions, course approval requirements, sharing courses, and adding instructors and surveys to a course are included in the instruction for this learning objective.
Lesson Duration:	60 minutes
Instructor Notes:	**Location**: Administration/Manage Training/Classroom **Permission Level**: Requires membership in the Course Manager and Classroom Course Manager roles. The content in this LO is very important. Now that the participants understand the high-level process, and have set up the course-related functions, they are ready to setup the actual classroom course to include sections and events. Discuss the course structure. The general information is basically a "shell" that contains the name, description, availability of the course, etc. Once the general information is added to the site, then there is a classroom course to add sections and events to. This is why the general information must be added prior to doing the sections and events. There has to be a course to attach the sections and events to. Explain that the section is what the user will register in. The attached event details are the actual date and time, location, and instructor for that section. Each course must have at least one section and one event.

3.1 COURSE CREATION

The Manage Training area provides the capability to manage traditional classroom course offerings. Because classroom courses often consist of multiple offerings, or section events, the capability to manage individual events also exists within the site.
Course creation and section/event management are separate functions. This allows you the option of creating courses that are complete (with section events) one at a time, or creating courses first and then adding section events later.

Single Event and Multiple Events Sections: In the Manage Sections (Section) workflow step when creating a classroom course, you may create either a single event section or a multiple events section. A single event section is a section that contains one event; you create the section and the event at the same time (one tab for creating both the section and one event). A multiple events section allows you to create the section and then create several events for the section (one tab for creating the section, another tab for creating an event, and then you may also create additional events when managing the section).

Access Approval For Courses and Sections: Access approval is set at the course level, not the section level. Therefore, when creating a course, use the Access Approval tab to enter the access approval information. This information will apply to the entire course and all sections within it. Sections within the course cannot have different access approval settings. However, when a user requests access, they will be requesting access to a specific section for the course, not the entire course (the "Request Access" option is displayed in the Action menu when the user is viewing sections for the course, not when the user is viewing the course listing).

Course and Section Surveys: One or more surveys can be associated with a course or course section. Surveys associated with the course are automatically associated with all sections created for the course. If you remove a survey from a course, it is also removed from the section. Course surveys cannot be removed at the section level. However, additional surveys can be associated with a specific section. Surveys added at the section level may also be removed at the section level.

3.1.1 WORKFLOW FOR CREATING A CLASSROOM COURSE

Any user assigned the course manager role can create a classroom course within their domain. The workflow for creating a new classroom course consists of the following:

1. *Edit Course Summary*: Summary information allows users to easily find the classroom course when they perform searches. This information includes the title of the course, a description and keywords that specifically relate to the classroom course, and other information.

2. *Manage Course Sections*: Manage Sections has two areas: Section List and Section Calendar. The Section List allows you to create classroom course sections, search for existing sections, or perform actions using the Action menu. A course section consists of one or more section events, which collectively define the dates, times, locations, and instructors for the entire course section. For each section you must create either a single event or multiple events.

The Section Calendar allows you to view all scheduled events for the current classroom course.

3. *Edit Section for Single/Multiple Event*: This is where you create a classroom course section and one or more events.

4. *Edit Events*: This is where you create, edit, view and delete classroom section events. The events are displayed in chronological order in the table on this tab. You may also view whether or not there are event conflicts (times, dates, locations or instructors) on this page. If there is a calendar with a checkmark on it for the event, then there are no conflicts. If the calendar has an "X," then there is a conflict. Make changes to one or more of the conflicting items in order to resolve the conflict.

5. *Assign Location*: This is where you search for and assign a location for a section event, and view information about a location if one has already been assigned.

6. *Assign Instructor*: This is where you assign one or more instructors to teach a section event. If an instructor has already been assigned for the event, information about the instructor is displayed. "No instructors have been assigned" is displayed if no instructors have been assigned yet. Prior to assigning an instructor you may view their schedule using the Action menu option after performing a search. When an instructor is assigned for a section event, the system sends an email to the instructor letting them know that they were assigned to teach one or more of the events for a course section, along with other information.

7. *Select Categories*: This is where you choose which category or categories contain this content. Categories are used to organize content within the system. The same categories are available system-wide.

8. *Access Approval*: This is where you select which approval path will be used when a user requests access to this content. Approval paths are created and managed at the enterprise level. Then the paths are assigned to content so that when users request access to content, the request is approved or denied by the users within the approval path. Content can only have one approval path. Access approval is optional. If a path has already been selected and is currently in use, it is displayed at the top of the tab next to "Current Approval Path."

9. *Assign Permissions*: This is where you search for roles, users, and organizations to assign a permission to view, or manage a course. Roles, organizations, and users already assigned to permissions for the course are displayed in a list at the bottom of the Edit Permissions tab. Existing permissions are also displayed in the list. Columns for all three permissions display; however, for courses the checkbox for the launch permission cannot be changed because it is disabled. Permissions can be changed at any time.

10. *Edit Course Activity*: In order to make a course active or inactive you must complete the Edit Activity workflow step. By default, after creating a new course it is automatically active for an indefinite period of time. Therefore, you only access this workflow step if you want to change the values. Inactive courses are stored in the system and are only viewable or searchable by authorized users when specifically searching for it using the Advanced search.

11. *Share the Course*: This is where you indicate how your course is shared. By default, when a course is created, it exists in the creating domain only. It is not shared or pushed unless you access the Content Sharing tab.

12. *Check in the Course*: Select the Check In tab when you have completed setting up the course so that users may access it, and the "Available" icon displays for the course in the Editing Status column in search results.

3.1.2 CREATE A CLASSROOM COURSE STEP-BY-STEP INSTRUCTIONS

To create a new classroom course:
1. Click Administration.
2. Click the plus sign next to "Manage Training."
3. Click Classroom.
4. Select "Create New" from the Page menu.
5. Click Go to access the Edit Summary page.
6. Complete the form by entering data in the fields as explained below. *All required fields are marked with an * asterisk.*

FIELD NAME	DESCRIPTION
*Title	The name of the course.
*Description	An explanation of the course.
*Keywords	Words and phrases that relate to the course that may not already be included in the title or description. When choosing keywords, think of words that a user would type into the search field when trying to find your course.
Course Cost ($)	The amount of currency a user will be charged for taking the course. Only numbers are accepted, and there must be a decimal point followed by two numbers.
*Course Provider	The name of the company/organization furnishing the course.
Duration (Hours)	The estimated timeframe for completing the course.
Course Number	The numeric identifier of the course.
Credit	The type of credit (e.g., Continuing Education Units, Seat Hours, etc.).
Credit Value	The numeric value of the credit (e.g., 1, 2, 3). Only numeric characters are accepted.

7. Click the Comments tab to enter comments about the information you entered.
8. Preview the information by clicking the Preview tab. (Optional)
9. Click Create. The Manage Sections tab displays.

To create a single event section:

10. Type a title for the section in the Section Title field.
11. Type a section code in the Section Code field. (Optional)
12. Type a number in the Minimum Capacity field that represents the minimum number of students needed for the section.
13. Type a number in the Maximum Capacity field that represents the maximum number of students that can be enrolled in the section.
14. Select whether or not the section will have a waitlist using the Waitlist Option buttons.
15. Click the calendar icons and select dates or use the menus and the Year field to enter the Section Start Date and Section End Date.
16. Click the calendar icons and select dates or use the menus and the Year field to enter the Enrollment Start Date and Enrollment End Date.
17. Click the calendar icon to select a date or use the menus and the Year field to enter the Enrollment Cancellation Deadline. (Optional)
18. Click the All Day Event checkbox if the event is for the entire day. (Optional) Note*:* If this is an all day event, the Start Time and End Time menus are disabled when you click the checkbox; skip the next two steps in this procedure.
19. Select a starting time for the event using the Start Time menu. (Optional)
20. Select an ending time for the event using the End Time menu. (Optional)
21. Select how often the event will happen using the Recurrence Type menu. Based on your selection, the Week menu and the Days checkboxes are enabled or disabled.
22. Make the appropriate selections using the Week menu (if you selected "Monthly By Day" for the recurrence type) or the Days checkboxes (if you selected "Weekly" for the recurrence type). (Optional)
23. Select whether or not the section will have a collaboration space using the Collaboration Space Option buttons.
24. Click Create. The Edit Events tab displays with a message at the top of the page indicating that the section was created. The section and event you created on the previous page is also displayed (notice that both the section and event have the same name). You may create more events using the Page menu, edit the event you created using the Action menu, or click another workflow step.

To create a multiple events section:

25. Type a title for the section in the Section Title field.
26. Type a section code in the Section Code field. (Optional)
27. Type a number in the Minimum Capacity field that represents the minimum number of student needed for the section
28. Type a number in the Maximum Capacity field that represents the maximum number of students that can be enrolled in the section.
29. Select whether or not the section will have a waitlist using the Waitlist Option buttons.
30. Click the calendar icons and select dates or use the menus and the Year field to enter the Section Start Date and Section End Date.
31. Click the calendar icons and select dates or use the menus and the Year field to enter the Enrollment

Start Date and Enrollment End Date.

32. Click the calendar icon to select a date or use the menus and the Year field to enter the Enrollment Cancellation Deadline. (Optional)
33. Select whether or not the section will have a collaboration space using the Collaboration Space Option buttons.
34. Click Create. The Add Event tab displays (so that you may create the first event for the section) with a message at the top of the page indicating that the section was created. If you do not want to create any events right now, click another workflow step or click Cancel to go back to the Manage Sections page.

To create an event:

35. Select Create New from the Page menu.
36. Click Go to access the Add Event tab.
37. Type a title for the event in the Event Title field.
38. Click the calendar icon and select dates or use the menus and the Year fields to enter the Start Date and End Date, or click the All Day Event checkbox if the event is for the entire day. (Optional) Note*:* If this is an all day event, the Start Time and End Time menus are disabled when you click the checkbox; skip the next two steps in this procedure.
39. Select a starting time for the event using the Start Time menu. (Optional)
40. Select an ending time for the event using the End Time menu. (Optional)
41. Select how often the event will happen using the Recurrence Type menu. Based on your selection, the Week menus and Days checkboxes are enabled or disabled.
42. Make the appropriate selections using the Week menu (if you selected "Monthly By Day") or the Days checkboxes (if you selected "Weekly").
43. Click Create. The Manage Sections tab displays with the new event listed in the table.

To assign the location:

44. Enter a numeric value in the Minimum Capacity field to indicate the minimum number of people that the location needs to be able to hold. (Optional)
45. Enter a numeric value in the Maximum Capacity field to indicate the maximum number of people that the location should be able to hold. (Optional)
46. Select the state in which the location exists from the State menu. (Optional)
47. Type additional search criteria in the Search Text field (such as the name of the location). (Optional)
48. Select a piece of equipment that is contained in the location from the Equipment Type menu. (Optional)
49. Select a room type from the Room Type menu. (Optional)
50. Click Search. A list of room locations that match the search criteria displays. Only locations that do not have schedule conflicts with other section events or calendar events for the dates and times indicated on the Edit Event tab are displayed.
51. Review the list and click the button next to the desired location.
52. Click Assign. The Edit Event tab displays, and the location for the event is saved. Note: You may only assign one location for an event.

To assign an instructor:

53. Type all or part of a last name, first name or both into the designated fields on the Search tab.
54. Click Search to view a list of instructors that match your search criteria.

55. Review the list and click the checkbox next to the desired instructor. Multiple instructors can be selected.
56. Click Assign. The Edit Event tab displays, and the instructor is saved for the event.

To select categories for the course:

57. Click the plus (+) sign to expand the tree and view the available categories.
58. Click the checkbox next to a category for the content. You may select multiple categories.
59. Click Save if you are going to continue making changes using other workflow steps (message displays indicating the category was saved) or click Return to go back to the previous page.

To add an access approval path:

60. Click Yes next to "Access Approval Required." (This step is only needed when a path is not already selected.)
61. Review the list of existing access approval paths to find the one you want to use. You may also use the search fields (Search Text, Search Type) to find an approval path faster.
62. Click the button to the left of the approval path you want to use.
63. Click Save. Note: If changing an access approval path, a confirmation message displays regarding the consequences of changing the path and you click OK. In both instances (selecting a path for the first time and changing a path), a message displays at the top of the page indicating the approval path was associated with the content.

To add permissions for a role/organization/user:

64. Search for users by name, role or organization to add to this permission. Enter search criteria in the fields and click Search.
65. Click the checkboxes to either place checkmarks in, or remove checkmarks from, the checkboxes in the View/Manage columns next to the entity(ies) for which you want to change permissions. You may change permissions for multiple entities at the same time.
66. Click Save. A message displays at the top of the page indicating the permissions were updated.
67. Click Return to go back to the Search page for courses or click another workflow step.

To set an activity:

68. Select the Edit Activity tab.
69. Click the button next to "Inactive" or "Active." The "Active" button is selected by default.
70. Click the calendar icon to select a date or use the menus and the Year field to enter the Start Date. (Optional)
71. Click the calendar icon to select a date or use the menus and the Year field to enter the End Date. (Optional)
72. Click Save (message displays indicating the activity was saved). Click another workflow step to continue making changes or click Return to go back to the previous page.

To share the course with other domains:

73. Click the Content shared to other domains button. The checkboxes in the table are enabled.
74. Click the appropriate checkboxes in the table to place checkmarks in them and indicate how the content will be shared. If the content is already shared and you want to unshare it, click the

checkboxes to remove the checkmarks. Note: For each domain, only one option can be checked.

75. Click Save.
76. Click Return to go back to the previous page.
77. Select the Check In tab when you have completed setting up the course so that users may access it, and the "Available" icon displays for the course in the Editing Status column in search results.

3.2 COURSE SURVEYS

For each course you can assign a survey. If there are surveys assigned for a course or section, the user will be required to complete them prior to receiving their course completion certificate.

3.2.1 ASSIGN A SURVEY TO A COURSE

To assign a survey to a course or section:

1. Click Administration.
2. Click the plus sign next to "Manage Training."
3. Click Classroom.
4. Type a keyword or phrase in the Search Text field.
5. Change the search type in the Search Type menu. (Optional)
6. Click Search to view a list of courses that match your search criteria.
7. The search results display alphanumerically and may include paging.
8. Review the list of search results and find the course you are looking for.
9. Click the Information icon to the left of the course title to view information related to the course. (Optional)
10. Select Survey from the Action menu.
11. Click Go. The Survey tab displays.
12. Select Assign Survey from the page menu.
13. Click Go. The Assign Survey tab displays.
14. Type a keyword or phrase in the Search Text field.
15. Change the search type in the Search Type menu. (Optional)
16. Click Search to view a list of surveys that match your search criteria.
17. The search results display alphanumerically and may include paging.
18. Review the list of search results and find the survey you are looking for.
19. Click the Information icon to the left of the title of the survey to view summary information. (Optional)
20. Click the checkbox to the left of the survey title for the survey you want to assign to the course. Multiple surveys can be selected.
21. Click Assign. A confirmation message displays.
22. Click OK to assign the survey to the course. The assigned survey is no longer displayed on the Assign Survey page. When you return to the Surveys page, the newly assigned survey displays in the list.

3.3 COURSE TESTS

For each course you can assign a test. If there are tests assigned for a course or section, the user will be required to complete them prior to receiving their course completion certificate.

In order for a course to be tied to a test you must create a curriculum. Curriculums allow delivery of blended learning. A curriculum is a content item that is created using a combination of training activities such as online courses, tests, classroom courses, and collaboration spaces. When adding training activities to a curriculum, you decide whether users must complete the training activities in a particular (prescribed) order, any order they want (elective), or a combination of both.

Users must enroll in a curriculum before they may access it. Progress through the training activities is tracked, and when all activities are completed, the user can access a certificate of completion for a curriculum from their transcript.

A curriculum is considered complete in the following situations:
- There are only prescribed learning activities and the user completes all of them
- There are only required elective activities and the user completes all of them
- There are only elective activities and the user completes all of them (although they are not required activities)

There are both prescribed learning activities and required elective activities and the user completes all of both types of activities

3.3.1 CREATE A CURRICULUM

To create a curriculum:
1. Ensure that the training activities you want to add to the curriculum are already in the system (i.e., access documents to ensure that the documents you plan to add as training activities are available, access other content areas to ensure that the content is available).
2. Click Administration.
3. Click the plus sign next to "Manage Training."
4. Click Curriculums.
5. Select "Create New" from the Page menu.
6. Click Go.
7. Type a new title in the Title Field.
8. Type new text for the description in the Description field.
9. Click the Comments tab to add comments about the curriculum. (Optional)
10. Preview the information by clicking the Preview tab. (Optional)
11. Click the Training Activities tab.

To add training activities:
12. Type a keyword or phrase in the Search Text field. (Optional)
13. Change the search type in the Search Type menu. (Optional)
14. Click Search to view a list of training activities that match your search criteria.
15. The search results display alphanumerically and may include paging.
16. Review the list of search results and find the training activities you are looking for.
17. Click the Information icon to the left of the title of training activities to view summary and review information. (Optional)

18. Click the button in the "Prescribed" column to add training activities as items that must be completed in a particular order. Note: For classroom courses, you must also click the "All Sections" checkbox or click checkboxes for specific sections. Therefore, you must make two selections for classroom courses.
19. Click the button in the "Elective" column to add training activities as items that must be completed, but not in a particular order.
20. Click Add at the bottom of the tab. A message displays at the top of the page indicating the training activities were added. Also, the added training activities are no longer displayed in the search results.
21. Continue to add more training activities or click Return to go back to the Edit Training Activities page.
22. Click the Glossary tab.

To add glossary terms:

23. Type a keyword or phrase in the Search Text field. (Optional)
24. Change the search type in the Search Type menu. (Optional)
25. Click Search to view a list of glossary terms that match your search criteria.
26. The search results display alphanumerically and may include paging.
27. Review the list of search results and find the glossary term you are looking for.
28. Click the Information icon to the left of the glossary term to view information about it. (Optional)
29. Click the checkbox next to the glossary term you want to add to the curriculum. You may select more than one term.
30. Click Add at the bottom of the search results table. A message displays at the top of the page indicating the glossary term(s) was associated with the curriculum, and the term(s) is no longer displayed in the search results.

To select categories for the course:

31. Click the plus (+) sign to expand the tree and view the available categories.
32. Click the checkbox next to a category for the content. You may select multiple categories.
33. Click Save if you are going to continue making changes using other workflow steps (message displays indicating the category was saved) or click Return to go back to the previous page.

To add an access approval path:

34. Click Yes next to "Access Approval Required." (This step is only needed when a path is not already selected.)
35. Review the list of existing access approval paths to find the one you want to use. You may also use the search fields (Search Text, Search Type) to find an approval path faster.
36. Click the button to the left of the approval path you want to use.
37. Click Save. Note: If changing an access approval path, a confirmation message displays regarding the consequences of changing the path and you click OK. In both instances (selecting a path for the first time and changing a path), a message displays at the top of the page indicating the approval path was associated with the content.

To add permissions for a role/organization/user:

38. Search for users by name, role or organization to add to this permission. Enter search criteria in the fields and click Search.
39. Click the checkboxes to either place checkmarks in, or remove checkmarks from, the checkboxes in

the View/Manage columns next to the entity(ies) for which you want to change permissions. You may change permissions for multiple entities at the same time.

40. Click Save. A message displays at the top of the page indicating the permissions were updated.
41. Click Return to go back to the Search page for curriculums or click another workflow step.

To set an activity:

42. Select the Edit Activity tab.
43. Click the button next to "Inactive" or "Active." The "Active" button is selected by default.
44. Click the calendar icon to select a date or use the menus and the Year field to enter the Start Date. (Optional)
45. Click the calendar icon to select a date or use the menus and the Year field to enter the End Date. (Optional)
46. Click Save (message displays indicating the activity was saved). Click another workflow step to continue making changes or click Return to go back to the previous page.

To share the curriculum with other domains:

47. Click the Content shared to other domains button. The checkboxes in the table are enabled.
48. Click the appropriate checkboxes in the table to place checkmarks in them and indicate how the content will be shared. If the content is already shared and you want to unshare it, click the checkboxes to remove the checkmarks. Note: For each domain, only one option can be checked.
49. Click Save.
50. Click Return to go back to the previous page.
51. Select the Check In tab when you have completed setting up the curriculum so that users may access it, and the "Available" icon displays for the curriculum in the Editing Status column in search results.

3.4 REQUIRED TRAINING

The Required Training page contains two links that allow you to search for required training assignments: Training Profile Search and Assigned Entities Search. By default, the Training Profile Search displays first when you access the Required Training page.

Either link can be used to:

- View existing required training assignments for the content.
- Cancel the training assignment for one or more entities.
- Create new training assignments.

3.4.1 ASSIGN REQUIRED TRAINING

When assigning training, the user must first select a training profile through which training will be assigned. The training profile determines the deadline for completing the training. You can also choose not to select a profile and assign non-recurring training without a deadline.

To search for and select a training profile:

1. Click Administration.

2. Click the plus sign next to "Manage Training."
3. Click Classroom.
4. Type a keyword or phrase in the Search Text field.
5. Change the search type in the Search Type menu. (Optional)
6. Click Search to view a list of courses that match your search criteria.
7. The search results display alphanumerically and may include paging.
8. Review the list of search results and find the course you are looking for.
9. Click the Information icon to the left of the course title to view information related to the course. (Optional)
10. Select Required Training from the Action menu.
11. Click Go. The Required Training page is displayed.
12. Type a keyword or phrase in the Search Text field. (Optional)
13. Change the search type in the Search Type menu. (Optional)
14. Select a profile type from the Profile Type menu. (Optional) Note: If you do not know whether the training profile you are looking for is a dynamic date or fixed date profile, then select the blank option from the menu.
15. Click Search to view a list of training profiles that match your search criteria.
16. The search results display alphanumerically and may include paging.
17. Review the list of search results and find the training profile you are looking for.
18. Click the Information icon to the left of the training profile to view information about it. (Optional)
19. Click the button next to the appropriate profile. Note: If the desired training profile does not display in the search results, you can use the Page menu to create a new training profile.
20. Click Select. The Assign Training page displays, and you can search for entities and assign training to them using the profile you selected.

To search for entities and assign training:

21. Enter specific search criteria in one or more of the search fields. (Optional)
22. Click Search to view a list of entities that match your search criteria.
23. The search results display alphanumerically and may include paging.
24. Review the list of search results and find the entity you are looking for.
25. Click the Information icon to the left of the title of the entity to view information about the item. (Optional)
26. Click the checkbox next to the entity to which training is being assigned. You may select more than one on the same search results page. Note: If you select an organization, you can choose whether sub-organizations are also automatically assigned the training by checking the "Include sub-organizations" checkbox to include them or leave it blank (sub-organizations will not be included).
27. Click Assign Training. A message displays at the top of the page indicating the training was assigned, and the entity(ies) no longer displays in the search results. An email is sent to the entity(ies) advising of the training assignment.
28. Click Return to go back to the previous page.

3.5 MANAGE ENROLLMENTS

Manage Enrollment is where you search for a course section to view and manage enrolled users. You must have Manage permission for the course in order to manage enrollment for it.

Managing enrollment in a classroom course includes the following:
- Enrolling users in a course section
- Waitlisting users in a course section
- Cancelling enrollment of users in a course section
- Cancelling the waitlist status of users in a course section

Users are enrolled/waitlisted in course sections, not the course. Since sections have capacity limits, users must be enrolled as individuals. Users cannot be enrolled by entire groups such as an organization, role or other grouping. Once capacity is reached for a section, users can be added to a waitlist if the section has one. If a course section is inactive, users can be enrolled or waitlisted but the users will not be able to see/access the course in any part of the site until it is active.

You may cancel enrollment for any student who has not yet completed the course. When you cancel enrollment, progress data (if any) is deleted. When an authorized user is cancelling the enrollment of a student, the Enrollment Cancellation Deadline restriction does not apply (i.e., authorized user can cancel a user's enrollment after this date has passed).

Users can be enrolled and waitlisted and have their enrollment and waitlist status cancelled in any current section (section for which the end date has not passed) or past section (sections for which the end date has passed). If a user has completed a section, their enrollment cannot be cancelled whether the section is past or current.

When managing enrollment for a past section, maximum capacity is ignored. You may enroll beyond the capacity to reflect all of the users that actually attended the section. When a user's enrollment is cancelled and there is a waitlist, the first user on the waitlist is automatically enrolled. However, once the section's end date has passed, automatic waitlisting is not enabled (i.e., if enrollment for a user is cancelled because the user did not attend the section, waitlisted users are not automatically enrolled).

If a user is enrolled in a classroom course section for which they did not have permission, the system automatically gives the enrolled user View permission for the course section. The user can then see the course in the Course Catalog, Site Search, on their transcript and under the Scheduled Training section of their My Learning Plan page.

If there is a plus sign to the left of the section's title, then click the plus sign to view users who are currently enrolled/waitlisted in the section.

3.5.1 BATCH ENROLL USERS

Batch Enroll Users is where you search for a user(s) and enroll them in a current or past classroom course section.

When enrolling a user, the Enrollment Start Date and Enrollment End Date (independent of Section Start Date and Section End Date) restrictions do not apply. After enrolling a user, they no longer display in the

Users List. A user can only be enrolled in one current section of the same course at one time. To enroll a user in a different section for the same course, the user's current enrollment must first be cancelled.

Once a section reaches maximum capacity, it is no longer displayed in the Sections List. If the section has a waitlist, it will be displayed in the Sections List on the Waitlist tab (click the link at the top of this tab).

To enroll a user in a current section:
- The course must be available (i.e., not under revision/checked out).
- The user cannot already be enrolled in the section. Note: They can be waitlisted in other sections for the course, but cannot already be enrolled in the section for which you want waitlist them.
- The section must currently be filled to capacity, have a waitlist and be valid (i.e., not have any conflicts).

To enroll a user in a past section:
- The course must be available (i.e., not under revision/checked out).
- The section must be valid (i.e., not have any conflicts).
- The "Section End Date" has passed.

When enrolling a user in a past section, the maximum capacity restriction does not apply (i.e., the total number of enrolled users may exceed the maximum capacity).

To enroll users in course sections:
1. Click Administration.
2. Click the plus sign next to "Manage Training."
3. Click Classroom.
4. Type a keyword or phrase in the Search Text field.
5. Change the search type in the Search Type menu. (Optional)
6. Click Search to view a list of courses that match your search criteria.
7. The search results display alphanumerically and may include paging.
8. Review the list of search results and find the course you are looking for.
9. Click the Information icon to the left of the course title to view information related to the course. (Optional)
10. Select Manage Enrollment from the Action menu.
11. Click Go. The Manage Enrollment page is displayed.
12. Select Batch Enroll Users from the page menu.
13. Click Go. The Enroll page is displayed.
14. Enter search criteria using the fields, menus and checkboxes in the User Search area.
15. Enter search criteria using the fields, menus and/or calendar icons in the Section Search area if the appropriate sections are not already displayed in the Section List at the bottom of the tab.
16. Click Search. A list of users displays to the left of the Sections List at the bottom of the tab, and the Sections List is updated if you changed the search criteria in the Section Search area.
17. Click the checkbox next to the user you want to enroll in the Users List. You may click the checkboxes next to more than one user to add multiple users at the same time. Tip: Find out the maximum capacity by clicking the information icon for the section. This way you will know how many seats are available before trying to enroll too many users.

18. Click the button in the Sections List next to the section for which you want to enroll the user.
19. Click Enroll. A message displays at the top of the page indicating the users were enrolled. Also, the enrolled users are no longer displayed in the Users List and the value for the number of enrolled students is updated in the Enrollment column of the Sections List. Enrolled users receive an email indicating they were enrolled, and their managers receive a copy of the email. Note: When the section becomes full, it is no longer displayed. See above - "Once a section reaches maximum capacity..."

Notes:

- After clicking Enroll, the system checks to see if the user is waitlisted in any section for the same course. If the user is waitlisted in one or more sections, their waitlist status (for all of the sections in which they are waitlisted) is cancelled. The system sends an email to the user for each waitlist status that is cancelled.
- After clicking Enroll, if the number of users selected will cause the maximum capacity to be exceeded, the system displays a message indicating there is not enough space in the section. None of the users are added. You may either find another section that has room for all of the users you want to add or click the information to find out the maximum capacity, subtract the number of students already enrolled (first number that is displayed in the Enrollment column in the Sections List) and only enroll the number of students for which the section has remaining space.
- Users can only be enrolled per each search results page. Therefore, you may not select a user on the first page of search results, then click another search results page, select more users and click Enroll because the user selected on the first page will not be included.

3.5.2 BATCH WAITLIST USERS

Batch Waitlist Users is where you search for a user(s) and add them to the waitlist for a current classroom course section. A user can only be waitlisted in current sections.

To waitlist a user:

- The course must be available (i.e., not under revision/checked out).
- The user cannot already be enrolled in the section. Note: They can be waitlisted in other sections for the course, but cannot already be enrolled in the section for which you want waitlist them.
- The section must currently be filled to capacity, have a waitlist and be valid (i.e., not have any conflicts).

A user can be waitlisted in multiple sections for the same classroom course at the same time. When waitlisting a user, the Enrollment Start Date and Enrollment End Date (independent of Section Start Date and Section End Date) restrictions do not apply.

To waitlist users in a classroom course section:

1. Click Administration.
2. Click the plus sign next to "Manage Training."
3. Click Classroom.
4. Type a keyword or phrase in the Search Text field.
5. Change the search type in the Search Type menu. (Optional)

6. Click Search to view a list of courses that match your search criteria.
7. The search results display alphanumerically and may include paging.
8. Review the list of search results and find the course you are looking for.
9. Click the Information icon to the left of the course title to view information related to the course. (Optional)
10. Select Manage Enrollment from the Action menu.
11. Click Go. The Manage Enrollment page is displayed.
12. Select Batch Enroll Users from the page menu.
13. Click Go. The Enroll page is displayed.
14. Click Waitlist.
15. Enter search criteria using the fields, menus and checkboxes in the User Search area.
16. Enter search criteria using the fields, menus and/or calendar icons in the Section Search area if the appropriate sections are not already displayed in the Section List at the bottom of the tab.
17. Click Search. A list of users displays to the left of the Sections List at the bottom of the tab, and the Sections List is updated if you changed the search criteria in the Section Search area.
18. Click the checkbox next to the user you want to waitlist in the Users List. You may click the checkboxes next to more than one user to add multiple users at the same time.
19. Click the button in the Sections List next to the section for which you want to waitlist the user.
20. Click Waitlist. A message displays at the top of the page indicating the users were added to the waitlist. Also, the value for the number of waitlisted students is updated in the Enrollment column of the Sections List. Waitlisted users receive an email indicating they were waitlisted, and their managers receive a copy of the email.

Notes:

- Since users can be waitlisted for more than one section, users still display in the Users List after they have been waitlisted for a section.
- After clicking Waitlist, the system checks to ensure that the course section is still filled to capacity. If the section is no longer filled, a message displays indicating the users were not waitlisted and that you can try to enroll the users or waitlist the users for a different section that is filled to capacity.
- Users can only be waitlisted per each search results page. Therefore, you may not select a user on the first page of search results, then click another search results page, select more users and click Waitlist because the user selected on the first page will not be included.

Lesson Information

Lesson Name:	LESSON 4: SCORM COURSES
Lesson Objectives:	Upon completion of this lesson, the learner will be able to: • Upload a SCORM course. • Edit a SCORM course.
Lesson Introduction:	This lesson introduces the functions involved in setting up a SCORM course in iLearnOregon. Other tasks related to online course setup, such as setting permissions, approval requirements, sharing with other domains, and adding surveys, are included in the instruction for this learning objective.
Lesson Duration:	45 minutes
Instructor Notes:	**Location**: Administration/Manage Training/SCORM 1.2/2004 **Permission Level**: Requires membership in the Course Manager, SCORM 1.2/2004 Course Manager, and SCORM 1.2/2004 Test Manager roles. If your agency does not have or use online courses then skip this lesson. A SCORM course is developed in a different software program (such as Adobe Captivate, Adobe Flash, Articulate, etc.) and then exported into a zip file that can be uploaded to iLearnOregon where users can launch the course.

4.1 SCORM COURSE CREATION

In order for an online course to be launched and tracked through iLearnOregon, the course must be SCORM (Sharable Content Object Reference Model) conformant. SCORM is a standard for online courseware that makes it easier to run a course in an LMS and send user progress data back to that LMS. SCORM also defines how content may be packaged into a transferable ZIP file.
iLearnOregon is a SCORM certified LMS. Any SCORM 1.2 or 2004 conformant courseware will run in the site.

4.1.1 WORKFLOW FOR CREATING A ONLINE COURSE

Any user assigned the course manager role can create an online course within their domain. The workflow for creating a new online course consists of the following:

1. *Upload Content*: You browse to find the SCORM 1.2 or 2004 compliant courseware package that you want to upload to the system. All courseware packages must be in ZIP (.zip file extension) format. After uploading a courseware package for the first time, you may re-upload a SCORM 1.2 or 2004 package and replace the existing package if the manifests for the original and new package are the same. If the manifests are not the same, you will not be able to re-upload (an error message displays).

2. *Edit Course Summary*: Summary information allows users to easily find the classroom course when they perform searches. This information includes the title of the course, a description and keywords that specifically relate to the classroom course, and other information.

3. *Select Categories*: This is where you choose which category or categories contain this content. Categories are used to organize content within the system. The same categories are available system-wide.

4. *Edit Window Attributes*: This is where you specify the window dimensions and other aspects of the window (e.g., presence of toolbars, ability to resize the window) in which the content displays.

5. *Access Approval*: This is where you select which approval path will be used when a user requests access to this content. Approval paths are created and managed at the enterprise level. Then the paths are assigned to content so that when users request access to content, the request is approved or denied by the users within the approval path. Content can only have one approval path. Access approval is optional. If a path has already been selected and is currently in use, it is displayed at the top of the tab next to "Current Approval Path."

6. *Assign Permissions*: This is where you search for roles, users, and organizations to assign a permission to view, or manage a course. Roles, organizations, and users already assigned to permissions for the course are displayed in a list at the bottom of the Edit Permissions tab. Existing permissions are also displayed in the list. Columns for all three permissions display; however, for courses the checkbox for the launch permission cannot be changed because it is disabled. Permissions can be changed at any time.

7. *Edit Course Activity*: In order to make a course active or inactive you must complete the Edit Activity workflow step. By default, after creating a new course it is automatically active for an indefinite period of time. Therefore, you only access this workflow step if you want to change the values. Inactive courses are stored in the system and are only viewable or searchable by authorized users when specifically searching for it using the Advanced search.

8. *Check in the Online Course*: Select the Check In tab when you have completed setting up the course so that users may access it, and the "Available" icon displays for the course in the Editing Status column in search results.

4.1.2 CREATE A SCORM COURSE STEP-BY-STEP INSTRUCTIONS

To create a new SCORM course:

1. Click Administration.
2. Click the plus sign next to "Manage Training".
3. Click "SCORM 1.2" or "SCORM 2004".
4. Select "Create New" from the Page menu.
5. Click Go to access the Upload Content page.
6. Click Browse. The Choose file window displays.
7. Click the down arrow from the Look in field to select the location of the .zip file.
8. Double-click the .zip file. The Choose file window closes and the file path is automatically displayed in the File Name field.
9. Click Upload. The Edit Summary tab displays.
10. Complete the form by entering data in the fields as explained below. *All required fields are marked with an * asterisk.*

FIELD NAME	DESCRIPTION
*Title	The name of the course.
*Description	An explanation of the course.
*Keywords	Words and phrases that relate to the course that may not already be included in the title or description. When choosing keywords, think of words that a user would type into the search field when trying to find your course.
Course Cost ($)	The amount of currency a user will be charged for taking the course. Only numbers are accepted, and there must be a decimal point followed by two numbers.
Course Provider	The name of the company/organization furnishing the course.
Duration (Hours)	The estimated timeframe for completing the course.
Course Number	The numeric identifier of the course.
Credit	The type of credit (e.g., Continuing Education Units, Seat Hours, etc.).

Credit Value	The numeric value of the credit (e.g., 1, 2, 3). Only numeric characters are accepted.

11. Click the Comments tab to enter comments about the information you entered.
12. Preview the information by clicking the Preview tab. (Optional)
13. Click Create.

To select categories for the online course:

14. Click the plus (+) sign to expand the tree and view the available categories.
15. Click the checkbox next to a category for the content. You may select multiple categories.
16. Click Save if you are going to continue making changes using other workflow steps (message displays indicating the category was saved) or click Return to go back to the previous page.

To edit window attributes:

17. Select "Yes" for attributes that you want displayed in the window or select "No" for attributes you do not want displayed (see explanations below).
18. Change the width of the window in the Width field. This value must be in pixels.
19. Change the height of the window in the Height field. This value must be in pixels.
20. Click Preview to view what the window will look like based on your selections.
21. Continue changing the attributes and previewing them until you are satisfied.
22. Click Save if you are going to continue making changes using other workflow steps (message displays indicating the attributes were saved) or click Return to go back to the Search page.

To add an access approval path:

23. Click Yes next to "Access Approval Required." (This step is only needed when a path is not already selected.)
24. Review the list of existing access approval paths to find the one you want to use. You may also use the search fields (Search Text, Search Type) to find an approval path faster.
25. Click the button to the left of the approval path you want to use.
26. Click Save. Note: If changing an access approval path, a confirmation message displays regarding the consequences of changing the path and you click OK. In both instances (selecting a path for the first time and changing a path), a message displays at the top of the page indicating the approval path was associated with the content.

To add permissions for a role/organization/user:

27. Search for users by name, role or organization to add to this permission. Enter search criteria in the fields and click Search.
28. Click the checkboxes to either place checkmarks in, or remove checkmarks from, the checkboxes in the View/Manage columns next to the entity(ies) for which you want to change permissions. You may change permissions for multiple entities at the same time.
29. Click Save. A message displays at the top of the page indicating the permissions were updated.
30. Click Return to go back to the Search page for courses or click another workflow step.

To set an activity:

31. Select the Edit Activity tab.

32. Click the button next to "Inactive" or "Active." The "Active" button is selected by default.
33. Click the calendar icon to select a date or use the menus and the Year field to enter the Start Date. (Optional)
34. Click the calendar icon to select a date or use the menus and the Year field to enter the End Date. (Optional)
35. Click Save (message displays indicating the activity was saved). Click another workflow step to continue making changes or click Return to go back to the previous page.
36. Select the Check In tab when you have completed setting up the course so that users may access it, and the "Available" icon displays for the course in the Editing Status column in search results.

4.2 SCORM COURSE SURVEYS

For each course you can assign a survey. If there are surveys assigned for a course, the user will be required to complete them prior to receiving their course completion certificate.

4.2.1 ASSIGN A SURVEY TO A SCORM COURSE

To assign a survey to a online course:

1. Click Administration.
2. Click the plus sign next to "Manage Training."
3. Click "SCORM 1.2" or “SCORM 2004”.
4. Type a keyword or phrase in the Search Text field.
5. Change the search type in the Search Type menu. (Optional)
6. Click Search to view a list of courses that match your search criteria.
7. The search results display alphanumerically and may include paging.
8. Review the list of search results and find the course you are looking for.
9. Click the Information icon to the left of the course title to view information related to the course.
10. Select Survey from the Action menu.
11. Click Go. The Survey tab displays.
12. Select Assign Survey from the page menu.
13. Click Go. The Assign Survey tab displays.
14. Type a keyword or phrase in the Search Text field.
15. Change the search type in the Search Type menu. (Optional)
16. Click Search to view a list of surveys that match your search criteria.
17. The search results display alphanumerically and may include paging.
18. Review the list of search results and find the survey you are looking for.
19. Click the Information icon to the left of the title of the survey to view summary information. (Optional)
20. Click the checkbox to the left of the survey title for the survey you want to assign to the course. Multiple surveys can be selected.
21. Click Assign. A confirmation message displays.
22. Click OK to assign the survey to the course. The assigned survey is no longer displayed on the Assign Survey page. When you return to the Surveys page, the newly assigned survey displays in the list.

Lesson Information

Lesson Name:	LESSON 5: GENERAL COURSES
Lesson Objectives:	Upon completion of this lesson, the learner will be able to: • Create a general course. • Edit a general course.
Lesson Introduction:	This lesson introduces the functions involved in setting up a general course in the LMS. Other tasks related to general course setup, such as setting permissions, approval requirements, sharing with other domains, and adding surveys, are included in the instruction for this learning objective.
Lesson Duration:	10 minutes
Instructor Notes:	Location: Administration/Training Management. Permission Level: Requires membership in the Course Manager or General Course Manager roles.

5.1 GENERAL COURSE CREATION

General Course is where you create and manage courses for which the system does not track course progress and completion (unlike other courses). These courses display on transcripts, in course reports, and in the Course Catalog.

General courses can be assigned as training, added to a curriculum and associated with an IDP element.

Unlike other courses where you may only upload one file, one or more files can be uploaded for general courses, or you may use a URL. Only one file can be uploaded at a time. If a .zip file is uploaded, the system will automatically extract the contained files and allow the user to select a start file (i.e, the first file for the course).

5.1.1 CREATING A GENERAL COURSE

To create or edit a general course:

1. Click Administration.
2. Click the plus sign next to "Manage Training".
3. Click "General Course".
4. Select "Create New" from the Page menu.
5. Complete the form by entering data in the fields as explained below. *All required fields are marked with an * asterisk.*

FIELD NAME	DESCRIPTION
*Title	The name of the course.
*Description	An explanation of the course.
*Keywords	Words and phrases that relate to the course that may not already be included in the title or description. When choosing keywords, think of words that a user would type into the search field when trying to find your course.
Course Cost ($)	The amount of currency a user will be charged for taking the course. Only numbers are accepted, and there must be a decimal point followed by two numbers.
Course Provider	The name of the company/organization furnishing the course.
Duration (Hours)	The estimated timeframe for completing the course.
Course Number	The numeric identifier of the course.
Credit	The type of credit (e.g., Continuing Education Units, Seat Hours, etc.).
Credit Value	The numeric value of the credit (e.g., 1, 2, 3). Only numeric characters are accepted.

6. Preview the information by clicking the Preview tab. (Optional)

7. Click Next .

To upload a file for the course for the first time:

8. Click the button next to "File Name."
9. Click Browse. The Choose file window displays.
10. Click the down arrow from the Look in field to select the location of the file. Note: By default, the file you choose will be used as the start file for the course. If you upload a .zip file, the files will be extracted and you will need to select a start file.
11. Locate the file and double-click it. The Choose file window closes and the file path is automatically displayed in the File Name field.
12. Click Create. A message displays indicating the course was created, and the name of the file you uploaded displays next to the "Current File" heading. Click another workflow step to make changes to the attributes of the course.
13. Click Return to go back to the Search page when finished managing the course.

NOTE: If the file you uploaded is a .zip file, the .zip will be extracted and the names of all the files display next to "Current File(s)" at the top of the tab. You must select a start file using the radio buttons next to the file names or the course will not work properly when a user tries to access it.

To select a start file (only applies to files extracted from a .zip):

14. Click the button next to the uploaded file that will be the start file (i.e., the first file that displays when a user accesses the course).
15. Click Save Start File. A message displays indicating the start file was saved.

NOTE*:* If you do not select and save a start file, when a user tries to access the course they will receive a message that indicates the course cannot be opened because there is no start file selected. The user will be advised to contact a site administrator.

To use a URL for the course for the first time:

16. Click the button next to "URL."
17. Type the URL in the "URL" field.
18. Click Create. A message displays indicating the course was created, and the URL you entered displays next to the "Current File" heading. Click another workflow step to make changes to the attributes of the course.

To select categories for the course:

37. Click the plus (+) sign to expand the tree and view the available categories.
38. Click the checkbox next to a category for the content. You may select multiple categories.
39. Click Save if you are going to continue making changes using other workflow steps (message displays indicating the category was saved) or click Return to go back to the previous page.

To edit window attributes:

40. Select "Yes" for attributes that you want displayed in the window or select "No" for attributes you do not want displayed (see explanations below).
41. Change the width of the window in the Width field. This value must be in pixels.
42. Change the height of the window in the Height field. This value must be in pixels.
43. Click Preview to view what the window will look like based on your selections.

44. Continue changing the attributes and previewing them until you are satisfied.
45. Click Save if you are going to continue making changes using other workflow steps (message displays indicating the attributes were saved) or click Return to go back to the Search page.

To add an access approval path:

46. Click Yes next to "Access Approval Required." (This step is only needed when a path is not already selected.)
47. Review the list of existing access approval paths to find the one you want to use. You may also use the search fields (Search Text, Search Type) to find an approval path faster.
48. Click the button to the left of the approval path you want to use.
49. Click Save. Note: If changing an access approval path, a confirmation message displays regarding the consequences of changing the path and you click OK. In both instances (selecting a path for the first time and changing a path), a message displays at the top of the page indicating the approval path was associated with the content.

To add permissions for a role/organization/user:

50. Search for users by name, role or organization to add to this permission. Enter search criteria in the fields and click Search.
51. Click the checkboxes to either place checkmarks in, or remove checkmarks from, the checkboxes in the View/Manage columns next to the entity(ies) for which you want to change permissions. You may change permissions for multiple entities at the same time.
52. Click Save. A message displays at the top of the page indicating the permissions were updated.
53. Click Return to go back to the Search page for courses or click another workflow step.

To set an activity:

54. Select the Edit Activity tab.
55. Click the button next to "Inactive" or "Active." The "Active" button is selected by default.
56. Click the calendar icon to select a date or use the menus and the Year field to enter the Start Date. (Optional)
57. Click the calendar icon to select a date or use the menus and the Year field to enter the End Date. (Optional)
58. Click Save (message displays indicating the activity was saved). Click another workflow step to continue making changes or click Return to go back to the previous page.
59. Select the Check In tab when you have completed setting up the course so that users may access it, and the "Available" icon displays for the course in the Editing Status column in search results.

To share the general course with other domains:

52. Click the Content shared to other domains button. The checkboxes in the table are enabled.
53. Click the appropriate checkboxes in the table to place checkmarks in them and indicate how the content will be shared. If the content is already shared and you want to unshare it, click the checkboxes to remove the checkmarks. Note: For each domain, only one option can be checked.
54. Click Save.
55. Click Return to go back to the previous page.
56. Select the Check In tab when you have completed setting up the course so that users may access it, and the "Available" icon displays for the course in the Editing Status column in search results.

Lesson Information

Lesson Name:	LESSON 6: INSTRUCTOR TOOLS
Lesson Objectives:	Upon completion of this lesson, the learner will be able to: • Edit student scores. • Manage a course roster. • View course survey statistics. • Manage a course collaboration space.
Lesson Introduction:	Once a classroom course is created, there are additional support functions that a course manager or instructor can perform. This lesson introduces the functions of managing class rosters, collaboration spaces, emails, and editing student scores.
Lesson Duration:	30 minutes
Instructor Notes:	**Location**: Administration/Manage Training/Instructor Tools **Permission Level**: Requires membership in Course Manager, Classroom Course Manager, or Instructor roles.

The Instructor Tools area allows you to edit scores for students in sections, send an email to students in a section, view the roster for a section, manage surveys for a section and launch/manage the collaboration space for a section.

6.1 COURSE ROSTER

Roster is where you view information about enrolled, waitlisted and pending users. The Course Roster contains the following information

- *Course Title*: The name of the course.
- *Section Title*: The name of the section for which the roster is being displayed.
- *Code*: The unique number that is used to identify this course's section - to differentiate this section from all other sections for this course and all other courses.
- *Section Number*: The unique number that is used to identify this section - to differentiate this section from all other sections for this course only.
- *Maximum Capacity*: The highest number of students that can be enrolled in the course section.
- *Enrolled/Waitlisted/Pending Users*: The number of users currently enrolled in the section/The number of users currently on the waitlist for the section/The number of users waiting to be placed in the section or on the waitlist.
- *Section Start Date*: The first day the section meets.
- *Section End Date*: The last day the section meets.

The enrolled, waitlisted, and pending users are displayed in tables and the following information is available:

- *Information Icon*: contain general information about the student.
- Last Name
- First Name
- *Attendance*: Indicates whether the student has attended the classroom course section.
- *Progress Status*: The student's current status for the course section.
- *Score*: The student's grade for the course section.

6.2 STUDENT SCORES

Edit Scores is where you enter attendance, progress status, and scores for students.

Once a user's status is set to "Completed," it cannot be changed. Therefore, anytime you click Save on the Edit Scores page when at least one user has the "Complete" status, the system will display a warning message that once the status is set to "Completed," it cannot be changed anymore.

6.2.1 EDIT ALL STUDENT SCORES

To edit all the student scores:

1. Click Administration.
2. Click "Instructor Tools."
3. Type a keyword or phrase in the Search Text field.
4. Change the search type in the Search Type menu. (Optional)

5. Make a selection from the Instructor menu - "Me" if you only want to see sections for which you are the instructor or "All Instructors" to view all of the sections that have instructors. Note: "All Instructors" is only available for Site Administrators.
6. Make a selection from the Section Status menu - "All" to see all sections in the past, present and future; "Current" to see all sections that are currently open; "Passed" to see all sections that are closed; or "Date Range" if you want to enter a specific date range (The Start Date and End Date areas become available. Use the calendar icon to auto-fill the date or make selections from the menus and type a year in the Year field).
7. Select the current activity of the section in the Activity field or leave it blank if you want to view both active and inactive sections.
8. Click Search to view a list of sections that match your search criteria.
9. Select Edit Scores from the Action menu.
10. Click Go. The Edit Scores page is displayed.
11. Click the Attendance checkbox if you want a checkmark to be placed in all of the checkboxes in the Attendance column in the table.
12. Select the progress status from the Progress Status menu that you want displayed in the Progress Status column in the table for all of the students.
13. Type the score in the Score field that you want displayed in the Score column in the table for all of the students.
14. Click Apply. The information is placed in the table, and you may now edit information directly in the table. Note: Clicking Apply does not save the changes you make. You must perform the next step even if you do not make any changes directly in the table.
15. Click Save to save any changes you made directly in the table. A message displays at the top of the page indicating the information was saved.

6.2.2 MANUALLY EDIT STUDENT SCORES

To edit scores manually:

1. Click Administration.
2. Click "Instructor Tools."
3. Type a keyword or phrase in the Search Text field.
4. Change the search type in the Search Type menu. (Optional)
5. Make a selection from the Instructor menu - "Me" if you only want to see sections for which you are the instructor or "All Instructors" to view all of the sections that have instructors. Note: "All Instructors" is only available for Site Administrators.
6. Make a selection from the Section Status menu - "All" to see all sections in the past, present and future; "Current" to see all sections that are currently open; "Passed" to see all sections that are closed; or "Date Range" if you want to enter a specific date range (The Start Date and End Date areas become available. Use the calendar icon to auto-fill the date or make selections from the menus and type a year in the Year field).
7. Select the current activity of the section in the Activity field or leave it blank if you want to view both active and inactive sections.
8. Click Search to view a list of sections that match your search criteria.
9. Select Edit Scores from the Action menu.
10. Click Go. The Edit Scores page is displayed.
11. Place a check in the Attendance column for all students who attended the course section.

12. Select a progress status from the Progress Status menu for all students.
13. Type a score in the Score field for students who have obtained a score.
14. Click Save. The information is saved, and a message displays at the top of the page indicating that the information was saved.

6.3 MANAGE COURSE SECTION COLLABORATION SPACES

When creating a new course, a course manager can create a collaboration space. The course collaboration space is where you share documents and knowledge with others who have registered or attended the course.

6.3.1 WORKFLOW FOR MANAGING A COLLABORATION SPACE

The workflow for managing a collaboration space consists of the following:

1. *Edit Summary*: Summary information allows users to easily find the collaboration space when they perform searches. This information includes the title of the collaboration space, a description, keywords that specifically relate to the collaboration space, and the type of collaboration space.

2. *Edit Logo*: This is where you upload a file that will be used as the logo for the collaboration space. The logo displays on the home page of the collaboration space. Using a logo is not required. The logo can be changed at any time by uploading a different file.

3. *Edit Collaboration Space Features*: This is where you select the features that your collaboration space will have. Only the selected features will display in the collaboration space. Search is a fixed feature that cannot be removed. The other features are:
   - Announcements (information or important communications intended for all users of a specific collaboration space)
   - Blog
   - Calendar
   - Directory (find other users of the collaboration space)
   - Documents (specific to the collaboration space - separate from Documents in Library)
   - FAQ (questions that are specific to the collaboration space and are often asked)

   Features that are enabled are indicated with a checkmark in the box to the left of the feature.

4. *Edit Collaboration Space Roles*: This is where you assign users to roles within the collaboration space. Roles within a collaboration space affect the user's experience (what a user can or cannot do and what a user can or cannot view/manage). A user may be assigned to more than one role within a collaboration space, and users may have different roles in different collaboration spaces. For example, you may be assigned to the Manager role in one collaboration space and be assigned to the Observer role in another.

   Collaboration Space Roles:

- *Contributor*: In addition to the same actions observers may perform, contributors may also add content and edit existing content.
- *Manager*: In addition to the same actions contributors may perform, managers may also add users and assign them to roles, and select categories and edit the summary information for the collaboration space. Managers control the activity of a collaboration space and decide what features are available.
- *Observer*: May only view and rate content within the collaboration space, and view other users associated with the collaboration space.

6.3.2 MANAGING A COLLABORATION SPACE STEP-BY-STEP INSTRUCTIONS

To create or edit summary information for a collaboration space:

1. Click Administration.
2. Click "Instructor Tools."
3. Type a keyword or phrase in the Search Text field.
4. Change the search type in the Search Type menu. (Optional)
5. Make a selection from the Instructor menu - "Me" if you only want to see sections for which you are the instructor or "All Instructors" to view all of the sections that have instructors. Note: "All Instructors" is only available for Site Administrators.
6. Make a selection from the Section Status menu - "All" to see all sections in the past, present and future; "Current" to see all sections that are currently open; "Passed" to see all sections that are closed; or "Date Range" if you want to enter a specific date range (The Start Date and End Date areas become available. Use the calendar icon to auto-fill the date or make selections from the menus and type a year in the Year field).
7. Select the current activity of the section in the Activity field or leave it blank if you want to view both active and inactive sections.
8. Click Search to view a list of sections that match your search criteria.
9. Select Manage Space from the Action menu.
10. Click Go. The Manage Space page is displayed
11. Type a new or change the existing title in the Title Field.
12. Type a new or change the existing description in the Description field.
13. Type new or change the existing keywords in the Keywords field.
14. Select or change the type of collaboration space using the Type menu.
15. Click the Comments tab to add comments about the collaboration space. (Optional)
16. Preview the information by clicking the Preview tab. (Optional)
17. Click Create if creating a new collaboration space, or click Save (continue using other workflow steps) or Return (go back to the Search page) if editing a collaboration space.

To upload a logo:

18. Click Browse. The Choose file window displays.
19. Click the down arrow from the Look in field to select the location of the file that you want to use as the logo.
20. Double-click the file. The Choose file window closes and the file path is automatically displayed in the File Name field.
21. Click Save. A message displays indicating the file was uploaded.

To add features to the collaboration space:

22. Click the checkbox to the left of each feature you want to include in your collaboration space (checkmark indicates the feature is enabled).
23. Click the Comments tab to add comments about the collaboration space. (Optional)
24. Preview the information for the collaboration space by clicking the Preview tab. (Optional)
25. Click Save if you are going to continue making changes using other workflow steps (message displays indicating the features were updated) or click Return to go back to the Search page.

To remove features from the collaboration space:

26. Click the checkbox next to the feature or features you want removed (no checkmark means feature is disabled).
27. Click Save. A message displays indicating the features were updated.
28. Click Return to go back to the Search page for collaboration space.

To add users to roles:

29. Select Edit Users from the Action menu next to the Role for which you want to add users.
30. Click Go. The Edit Users tab displays.
31. Type all or part of the last name of the user you want to add in the Last Name field. (Optional)
32. Type all or part of the first name of the user you want to add in the First Name field. (Optional)
33. Click Search. A list of users matching your search criteria displays.
34. The search results display alphanumerically and may include paging.
35. Click the checkbox next to the user you want to add. You may select multiple checkboxes.
36. Click Add Selected. A message displays at the top of the page indicating the user(s) was assigned to the permission, and the user(s) is no longer displayed in the search results.
37. Repeat the two previous steps for more users on other search results pages (if there are more search results pages). (Optional)
38. Click Return to go back to the Edit Permissions tab. The users you added are displayed in the table at the bottom of the Edit Permissions tab.
39.

Lesson Information

Lesson Name:	LESSON 7: REPORTS
Lesson Objectives:	Upon completion of this lesson, the learner will be able to: • Run a Report • Understand the Input Pages
Lesson Introduction:	The content in this lesson will assist the user in running standards reports.
Lesson Duration:	15 minutes
Instructor Notes:	Location: Administration/Reports Console Role/Permission Level: Course Manager.

7.1 OVERVIEW

Reports enable a user to get data out of the system. The Reports Console is where you access, create, and edit both custom and standard reports (only summary information can be edited for standard reports).
Some reports are available to all users, while others are limited to only those users who are granted specific permission to view a report. Users assigned to the Administrator role can view and manage all reports for their domain.
The reports available to a course manager are displayed in an HTML format that allows users to export them to Excel, convert to a .PDF, or print the report.
If you delete a report from the domain in which it was created, the content will be permanently deleted from all domains and any user records associated with it will also be deleted. If the report was not created in the domain, then it will only be removed from the domain (i.e., it will be sent back to the Shared Content area and if you want to put it in the domain again, you can obtain it from the Shared Content area).

7.1.1 COURSE MANAGER REPORTS

Course Managers have access to the following reports:

- *Course and Content Ratings*: View courses and content items by rating. Courses and content items that do not have ratings do not display in the report. Courses and content are filtered according to your permissions on the course/content item. You can only see courses in the results that you have permission to view, launch or manage.
- *My Assigned Training*: My Assigned Training is a report that displays the courses and content items to which a user has been assigned and the user's progress against those assigned items. All courses/content to which a user has been assigned are displayed in the report, regardless of activity or permissions.
- *My Content Access*: My Content Access is a report that enables a user to see information about when they launched and completed a content item and how many times it was accessed. All courses/content to which a user has been assigned or completed are displayed in the report, regardless of activity or permissions.
- *My Training Progress*: This report shows the user's progress for online courses, classroom courses, curriculums, tests, and training assignments. This report also details course progress information for the currently logged in user; all courses that the user has enrolled, started or completed.
- *Survey Statistics*: View the results of both content surveys (surveys associated with a course) and site surveys. The user first selects a survey, and then selects additional criteria (i.e., search text, date range, and delivery method) to further define what data is returned in the results. When the user runs the report, they can toggle between a summary report and a detailed report. A summary report includes the average response for each multiple choice question, and a link to individually view short answer responses for one question at a time. A detailed report includes totals and percentages for all multiple choice responses, and the full text of all short answer questions.

An Instructor can see surveys associated with courses/sections they are scheduled to teach, and can access these survey statistics through Instructor Tools.

7.2 RUNNING A REPORT

The Run Report page is where you set your filters (e.g., selecting an organization, start/end dates, number of records per page in the report) to run a standard report and view information based on the filters you indicated. Based on the report you are running, the filters displayed on this page will be different. Custom reports may not have any filters on this page (may only have the Run Report button).
Some reports have input pages prior to actually allowing you to run a report.

To run a report:

1. Click Administration, Click on the Reports Console.
2. From the Reports Console page type keywords in the Search Text field. Select items from other search criteria options to refine the results and then click Search.
3. Find the report you will like to run and click on Select in the Action menu.
4. Click Go to access the Run Report page.
5. Enter your filter selections using the fields, menus and checkboxes that are available.
6. Click Run Report. The report displays in a new window.
7. At this point you have several options. The first four options are available for every report. Other options may or may not be available depending on the report you are viewing.
   - Print
   - Export to Excel
   - Export to PDF
   - Export to XML
   - Click titles of row headings to sort the results according to the heading you selected
   - Click a course name to view course statistics
   - Click a user's last or first name to view their training progress
   - Type a number in the "Page" field to go to another page in the report, or use the left and right arrows

7.3 SURVEY STATISTICS INPUT PAGE

Survey Statistics is where you search for a specific survey for which to run a report. Prior to run … page, then run the rep … for more than one sur…