Course Author

Course Author Introduction

Course Author Account Types

- Type 3 (e.g. Publisher)
- Type 13 (e.g. Campus Admin)

Site Managers may also accomplish many of these functions.

This manual has been written as a guide for course authors. These account types are typically used to create course content and complete activities in the learning management system such as:

- Create courses
- Upload files
- Create tests and use question banks
- View grades and results

Permissions Covered in Different Manuals

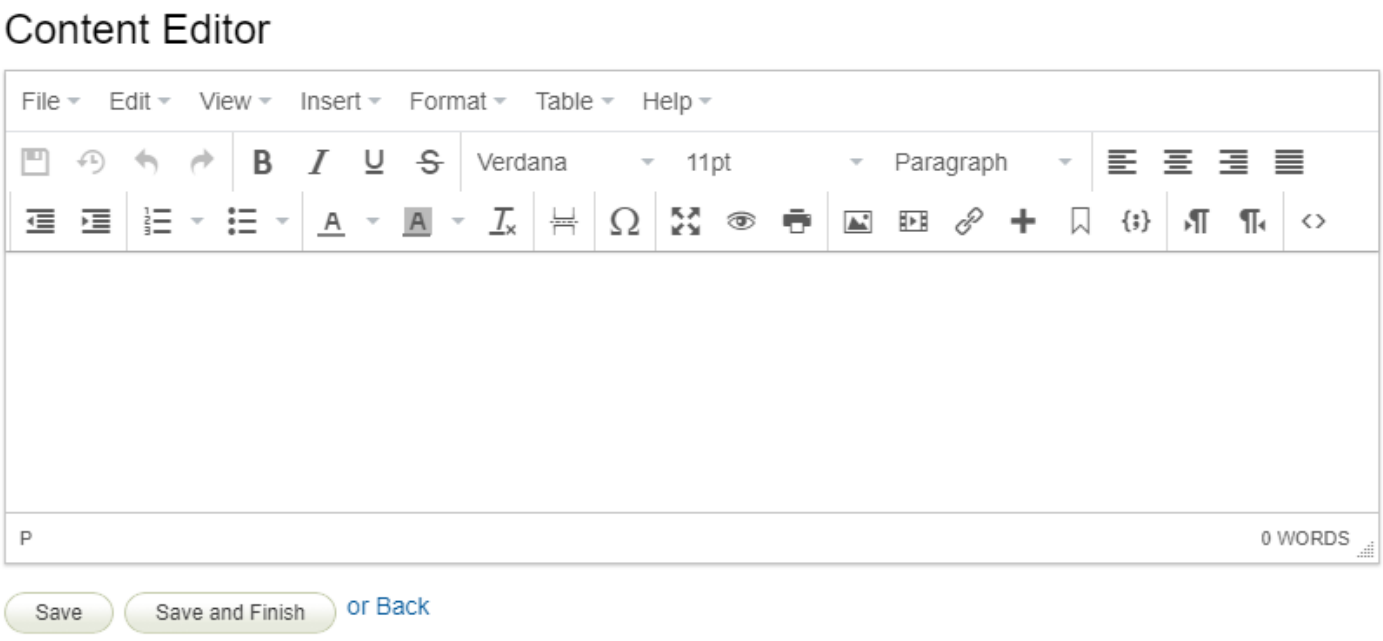
Course authors may have other permissions associated with their accounts.

- Navigation and general desktop experience can be found in the **Participant User Manual**.
- Managing grades and scheduled courses can be found in the **Instructor User Manual**.
- Managing registration, accounts, and user groups can be found in the **Manager Manual**.
- Running reports can be found in the **Reports Manual**.

This manual may reference features not configured for your system or features may be named differently due to site customizations. Informetica is under constant development and some differences between the live application and this manual may occur.

The Content Editor

The content editor makes it as easy for course authors to enter and edit content. The editor reflects the content you add as it will appear in its finished state. The same editor is used throughout the LMS allowing you to format text, add hyperlinks, add links to uploaded files, and insert tables using familiar tools that are found in most office productivity programs. There is also an option to work directly in the HTML code. For a guide to the editor tools, please see the Content Editor Tools section below. You can increase or decrease the height and width of the content editor by selecting and dragging the bottom right corner of the window.



Each menu item at the top (e.g., Edit, View, Format) also has content editor tools. So if you

don't see an icon for the action you want to accomplish, check one of the menus.

Copy Paste Best Practise

Copying text into the content editor from another source (e.g., MS Word or another webpage) can include embedded HTML code that shows up when you view the page. The copied text can also convert differently than it appears on the original document. For this reason, it is best practice to pasted unformatted text into the content editor. Here are few methods to paste into the content editor without the formatting.

A. When you copy/paste into the content editor, use a keyboard shortcut to strip away the formatting to paste as text only. Use Ctrl + Shift + V for Windows or Cmd + Shift + V for Mac .
B. Paste the text into notepad, copy it from notepad, and then paste it into the content editor.
C. After a copy/paste, select all text and apply Clear Formatting (under Format or the T button on the editing bar) before saving.

Content Editor Tools

Toolbar Group 1



Toolbar Group 2



Action	Description	Action	Description
Save	Save content and formatting changes you have made.	Bold	**Bolds** the selected text.

Toolbar Group 1



Toolbar Group 2



Action	Description	Action	Description
Restore Last Draft	Reset all changes on the page since the last save.	Italic	Italicizes the selected text.
Undo	Undo your last action.	Underline	Underlines the selected text.
Redo	Reverses an undo action	Strikethrough	Adds a ~~strikethrough~~ to the selected text.

Toolbar Group 3



Toolbar Group 4



Action	Description	Action	Description
Font Family	Changes selected text font (Helvetica, Arial, etc.).	Align Left	Arranges text along the left side of the page or table cell.
Font Size	Changes selected text to the desired font size (8pt - 36pt).	Align Center	Arranges text along the center of the

Toolbar Group 3



Toolbar Group 4



Action	Description	Action	Description
			page or table cell.
Font Format	Converts selected text to the selected style (normal, headers, etc.).	Align Right	Arranges text along the right side of the page or table cell.
		Justify	Arranges text along the center of the page or table cell.

Toolbar Groups 5-6



Toolbar Groups 7-8



Action	Description	Action	Description
Decrease Indent	Positions selected text further left from the margin.	Text Colour	Change the colour of the selected text.
Increase	Positions selected text further	Background	Change the background

Toolbar Groups 5-6



Toolbar Groups 7-8



Action	Description	Action	Description
Indent	right from the margin.	Colour	colour of the selected text.
Numbered List	Create or remove a numbered list on the page.	Clear Formatting	Remove formatting from the selected text (i.e., bold, italic, etc.)
Bullet List	Create or remove a bulleted list on the page.	Page Break	Inserts a page break that is only applicable to printed content.

Toolbar Groups 9-10



Toolbar Group 11



Action	Description	Action	Description
Special Character	Insert special characters (e.g., symbols, accent marks).	Insert/Edit Image	Insert, edit, or remove images uploaded in the media library.
Full Screen	Toggle content editor between full-screen size and normal view.	Insert/Edit Media	Insert, edit, or remove media files uploaded in the media library or embed external media

Toolbar Groups 9-10



Toolbar Group 11



Action	Description	Action	Description
			files.
Preview	View the current edit prior to saving.	Insert/Edit Link	Create, edit, or remove a hyperlink for the selected text or image.
Print	Create a hardcopy or PDF version of the page.	Insert/Edit Popup	Link to a separate asset or URL to create a popup on the current page.
		Anchor	Add an anchor link to a page used to go to specific places on the page.
		Insert/Edit Code Sample	Properly displays code on that page that's not interpreted as code by the content editor.

Toolbar Groups 12-13



Action	Description
Left to Right	Changes the paragraph to left to right script (default)
Right to Left	Changes the paragraph to right to left script (e.g., Hebrew, Arabic)
HTML Editor	Work in HTML source code rather than the editor view.

Media Libraries

Media libraries store course digital files. Media Library tools let you upload materials to the LMS for use in course creation. These materials can be documents, images, multimedia files, and more.

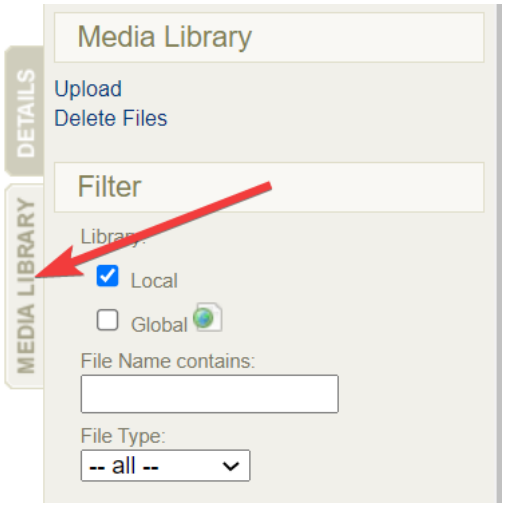
There are two types of media libraries:

Navigate to a Local Media Library

Local Media Libraries are located within each product. These libraries hold files that can only be

used in the specific product that the library belongs to. Local libraries are available in all products that a course author can access. Site Managers may access any local library.

1. Log in with a course author or Site Manager account.
2. Open a product and edit any asset or the introduction page.
3. **From the edit screen, select Media Library.**
    a. For course authors, the Media Library is in the left panel.
    b. For Site Managers, select the Media Library tab on the right. If you can't see the tab, show the Tool Panel .



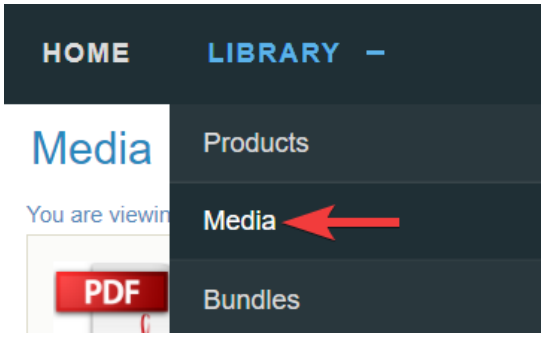
4. Optionally filter by file type or file name and then select **Go** at the bottom of the filter. If you can't see the filter menu, show the Tool Panel .
5. Select the name or image of a file to open it or download to your computer.
6. Manage the files in this library using the options menu, including uploading and deleting files. If you can't see the menu, show the Tool Panel .
7. The Manage FTP tool for uploading large files is also located here, if configured for your site.

Navigate to the Global Media Library

This feature is available to Site Managers.

The global media library houses files accessible to Site Managers. Files stored in this library can be used in any product and where ever there are content editor pages throughout the system.

1. Log in with a Site Manager account.
2. Select Media from the Library tab.



3. Optionally filter by type or name and then select **Go** at the bottom of the filter. If you can't see the filter menu, show the Tool Panel .
4. Select the name or image of a file to open it or download to your computer.
5. Manage the files in this library using the options menu, including uploading and deleting files. If you can't see the menu, show the Tool Panel .
6. The Manage FTP tool for uploading large files is also located here, if configured for your site.

Upload Files

This feature is available to Site Manager and Course Author accounts, depending on system configuration.

Media files must be uploaded to the LMS before you can insert them into a product or asset. A wired connection is recommended to avoid connectivity issues when uploading anything but small files.



Files that exceed 75 MB can be using the Manage FTP tool (see below), if available for your site, or create a ticket to have an LMS Administrator upload the file for you.

Upload a Single File

1. Navigate to the appropriate media library .
2. Select **Upload** in the media library menu. This page displays information about files sizes and supported files types.
3. Select **Browse/Choose File** to locate the file you wish to upload.
4. Optionally enter a new file name in the **Filename** field. If a file with the same name and extension already exists, you will be asked if you wish to overwrite the existing file.
5. Select **Continue** to upload the file. During the upload you will see a progress bar that displays the status of your upload.
6. Optionally upload another file or press continue to return to the product you were working in.
7. If you uploaded an image, you will also have the option to resize it. Images over 700 pixels wide will be automatically resized.

Upload Multiple Files

You can zip multiple files and types to upload them as a single .zip file. Zipped files keep their original size when uploaded in zipped format. See Zip and Unzip Files . See also FTP File Upload below.

1. Navigate to the appropriate media library .
2. Follow the steps to upload a single file above, selecting a zipped file. The system will recognize zipped files and prompt you to choose an upload method.
    a. Select Leave as one zip package of files and place in the documents folder.
    b. Select Unpack files into the media library to move them to the categories (audio/video, documents, images, and templates).

FTP File Upload

The FTP tool is available for uploading files that exceed 75 MB and for moving multiple files at a time. Manage FTP is located under the options menu in the global media library and under the media library menu in local media libraries.



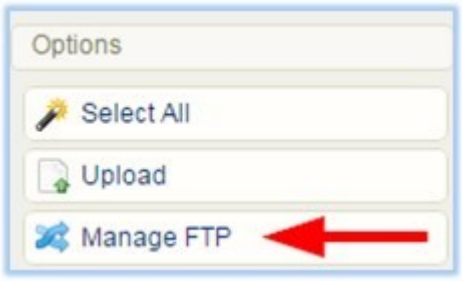
You must be provided with FTP protocols for Host, Username, and Password to access the LMS FTP.

FTP Setup

1. Use of an FTP program to transfer files to the LMS FTP folder is necessary (e.g., Filezilla. Here's a link to a video that shows how it works). It is recommended that clients work with their IT department to setup an FTP program based on their company's internal policies.

Manage FTP

1. Navigate to the destination media library .
2. Select **Manage FTP**.
    a. Located under the Options menu in the global media library.



    b. Located under the media library menu in local media libraries.



3. From the list of files in your FTP folder, select a file to transfer to the media library you are in.



4. Select the **Transfer File** button.
5. Select an import file option.
6. Select **Continue Transfer**.

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

Delete Media Files

Delete Files from a Local Media Library

This feature is available to Site Manager and Course Author accounts, depending on system configuration.

1. Navigate to the local media library within the product that contains the files to delete.

2. Select Delete Files in the media library menu.
3. Select the file type from the Select Section drop down.
4. Select one or more files to delete and then select Delete.
5. A prompt will ask you to confirm the deletion.

Delete Files from the Global Media Library



This feature is available to Site Manager accounts.

1. Navigate to the global media library .
2. Select files to by highlighting them.
3. Select **Delete Selected** in the options menu.
4. Use your FTP client to remove files that were uploaded via FTP.
5. A prompt will ask you to confirm the deletion.

Products and Courses

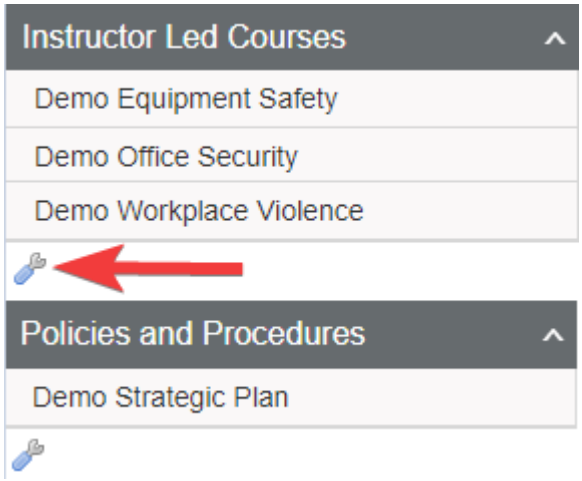
Products are a collection of materials, tests, text, and media used to inform, teach, demonstrate understanding, or prove compliance (e.g. courses, instructor led training). A product is typically made up of individual of individual components with unique features known as assets (e.g. tests or lessons).

Navigate to Products

Products are a collection of materials, tests, text, and media used to inform, teach, demonstrate understanding, or prove compliance (e.g. courses, standard operating procedures). A product is typically made up of individual of individual components with unique features known as assets (e.g. tests or lessons).

Navigate to Products with Course Author Account

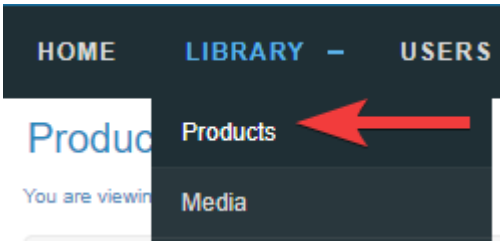
1. Log in with an account with course author permissions.
2. Select the wrench icon at the end of the list of products on the home page. Selecting the wrench ensures you see all products you have access to, not just those that are active on the home page.



If you have access to multiple product types, each container will have a wrench. Select the wrench that corresponds with the product type you wish to view.

Navigate to Products with Site Manager Account

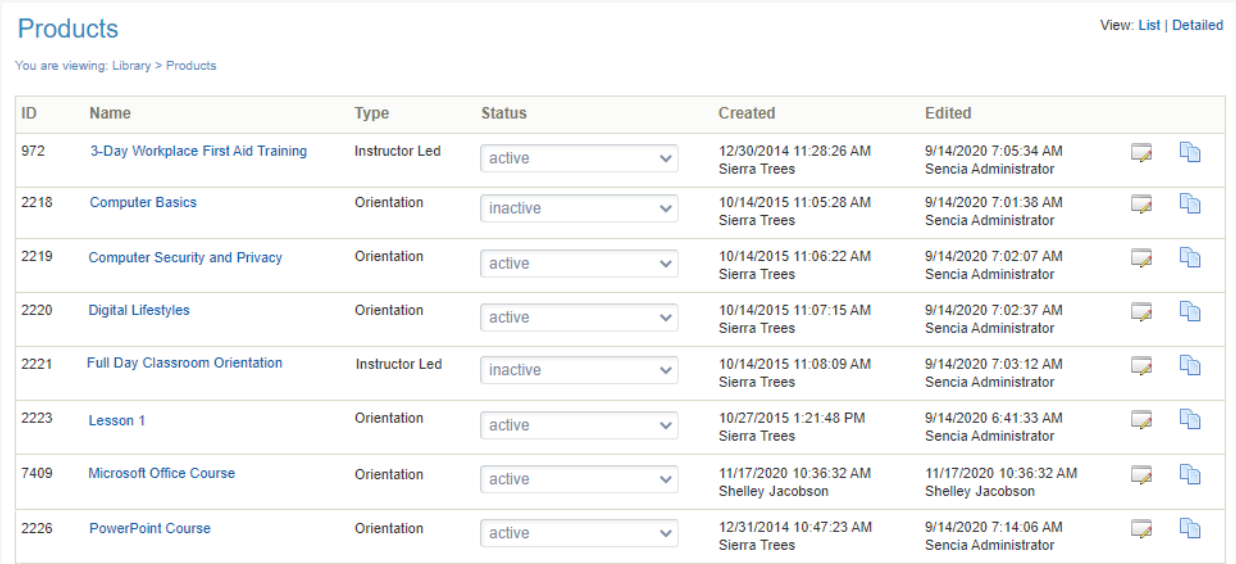
1. Log in with a Site Manager account.
2. Select **Products** under Library in the main navigation menu.



3. A detailed list displays the Product ID, Name, Type, Status, Created and Edited dates. This page allows you to view, sort, filter, delete, copy, and edit products.
4. Use the optional sort and filters on the right. If you cannot see the menu, show the Tool Panel .

> View the product filters video tutorial.

Example of the Products page.



Access Duration and Deadlines

You have control over when learners can start a course and how much time they have to complete it. You can configure a course with an expiry, due date, or a start and end date range. Select a method below to learn more.

Expiry Date

Using an expiry date, you can choose to provide access to a course for a specified amount of time, based on the user's course enrolment date. When the course expires, it is removed from the user's home page and they cannot access it.

> For example, you can set the course to expire 30 days from the point of enrolment. This is helpful if learners are being enrolled in the course on different days and you want to provide all learners with the same amount of time to attempt the course.

1. Navigate to Products .
2. Create or Edit the product.
3. Select **Expires Every**. By default, a product is set to Never Expires.



4. Enter the number of days that the course is available to the user based on the user's course enrolment date.
5. **Save**.
6. To extend the access for an individual, you must grant them an exception. See Exceptions in the Manager user manual .

Expiry Reminder Notifications

Reminder emails are available for expiry. Notifications stop being sent as soon as an administrator overrides them using an exception or the import tool. The system will check if users have been granted an exception and based on the date, they will not receive a reminder email.



A product with an expiry cannot also have a due date. An updated expiry date applies to new enrolments but does not retroactively affect currently enrolled users.

Due Date

Using a due date, you can choose to provide access to a course for a specified amount of time, based on the user's course enrolment date. Dues dates allow access to a course from the 1st day of the enrolment month to the last day of the due month. Due dates allow you to automatically re-enrol a course every X years and set an access period before the new due date. After the due date passes, the course is removed from the user's home page and they cannot access it.

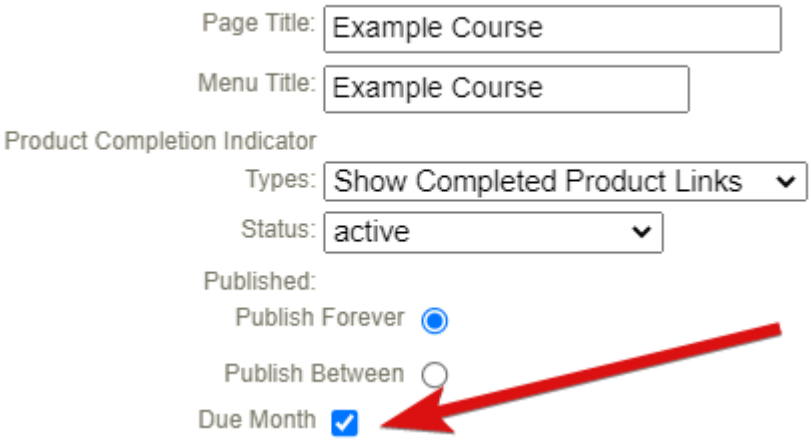
- Upon completion of the course, the LMS auto-updates the due date for the retake through an overnight process.
- The due date is calculated from the user's current due month.
- Access to the retake is granted starting a number of months defined in Due Month prior to the due date.

Notifications can be sent to learners and managers automatically to ensure they are notified. A

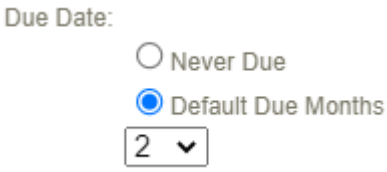
learner's new due date automatically updates upon completion of the course. Due dates work with automatic re-certifications as well. Learners can be prompted to retake a course, and by extension, become re-certified before the current certification expires. When learners complete the course, the old certificate is replaced with a new one.

> A real-world analogy is an Ontario driver's licence. The license expires every 5 years at the end of your birth month. You can renew it 6 months before it expires, but no earlier than that. Due dates can work well for clients in regulated industries since the automatic re-enrollment feature can help ensure that learners are consistently compliant.

1. Navigate to Products .
2. Create or Edit the product.
3. Enable the product **Due Month**.



4. Under the Due Month, select **Default Due Months** and then use the drop-down to define the number of months that the course is available to the user based on the user's course enrolment date. Course access is removed at the end of the defined calendar month. For example, a course with a due month of 2 allows a learner access from January 1st (as permitted by enrolment date) until February 31st.



5. Enter the number of years that the course will need to be re-enroled. The years are automatically applied based on the user's course enrolment date. When the user completes the course, the new due date is automatically updated. This default can be overridden by an Admin on the learner's registration page. See Override the Due Month for an Individual below.



6. Optionally enable **Automatic Re-Enrolment**. Note that for this behaviour, the product must also have **Allow Retakes** enabled.
7. **Save**.
8. Run report R213 to determine the due dates for a group of learners. Filter by due month and opt to report on all or one selected product at a time.

Due Date Reminder Notifications

Reminder emails are available for due dates. Notifications stop being sent as soon as an administrator overrides them using an exception or the import tool. The system will check if users have been granted an exception and based on the date, they will not receive a reminder email.

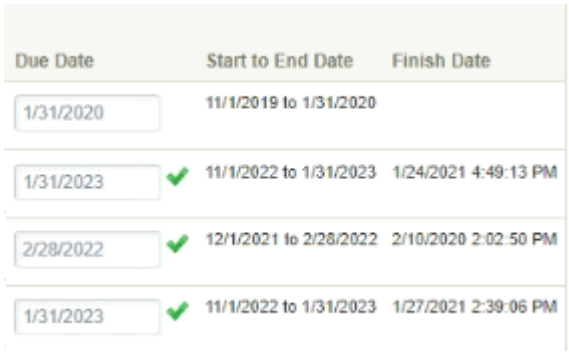
A product with a due date cannot also have an expiry. An updated product due date applies to new enrolments but does not retroactively affect currently enrolled users.

Override a Learner's Due Date

The LMS auto-calculates the Due Date for each user when they are enroled in the course, however, this date can be overridden by an Admin on the learner's registration page.

When the due date is updated for a learner, the Due Month set at the product level remains. For example, a product has a due month of 3. A learner is enrolled in the product on January 1st, so by default, their product is due on March 31st. If their due date is changed on their registration page 9/20/2024, they still only have access during the 3-month range. This means they will not see the product on their home page until 06/21/2024, regardless of the initial enrollment date.

1. Navigate to the user's profile .
2. Select **Registrations** from the Section menu.
3. Enter a new date in the Due Date field for any enroled course with a due date. Due dates showing green checkmark have been re-enroled automatically via the LMS overnight process.



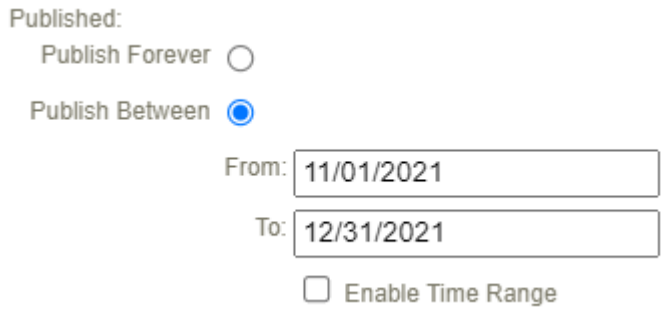
A product with a due date cannot also have an expiry date. An updated product level due date applies to new enrolments but does not retroactively affect currently enrolled users.

Publish Dates

Adding publish dates to a product assigns a global fixed date range of availability. The product is not accessible outside of the defined date range and applies to all enroled users. Outside of the publish dates, the product is not shown on the home page and is not available to users.

> Publish Dates work well for clients in academic industries. For example, add a publish date range to a course offered only in the 4th semester. The publish dates correspond to the semester start and end dates to ensure that the class course is only available during that time.

1. Navigate to Products .
2. Create or Edit the product.
3. Select **Publish Between**.



4. Enter the Start Date in the Publish Date field. This is the first available date that users can access the course.
5. Enter the End Date in the Publish Date field. This is the last available date that users can access the course.
6. Optionally Enable Time Range. Please note this is expressed in Eastern time.
7. **Save**.
8. To extend the access for an individual, you must grant them an exception. See Exceptions

in the Manager user manual



A product can have a publish date in addition to a due date or an expiry date.

Comparison of Due Date, Expiry, and Publish Date

Courses that contain an Expiry Date or a Due Date use the same functionality in regards to counting down to the period where access is revoked. Publish dates revoke access globally on specific dates.

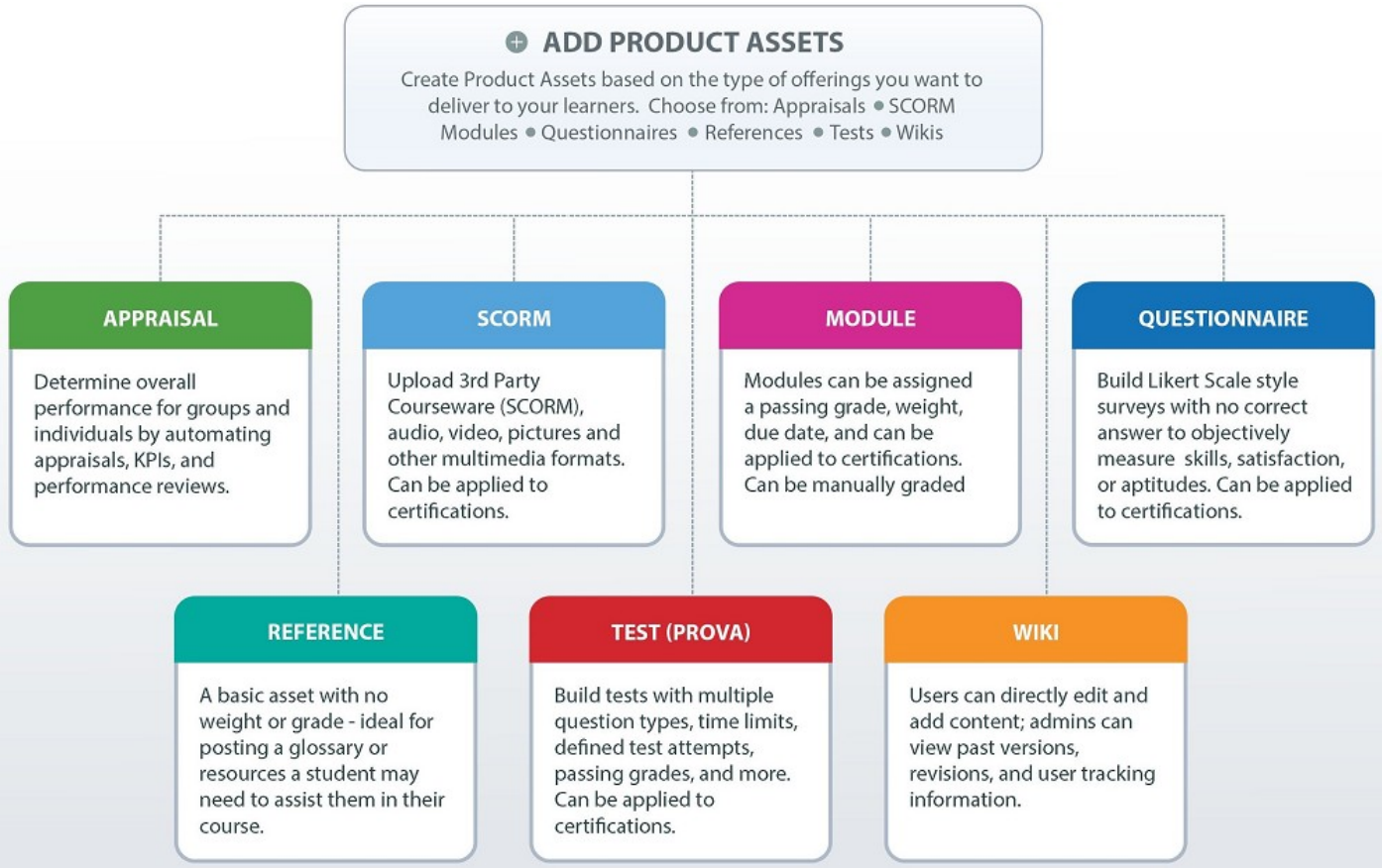
Functionality	Due Date	Expiry Date	Publish Dates
Course access period is based on the course enrolment date	Yes	Yes	No
Course access period is a static date range applied to everyone enroled in the course	No	No	Yes
Course access period is a static number of days applied to everyone enroled in the course	No	Yes	No
The course access period is defined by the 1st day of the user's course enrolment month to	Yes	No	No

Functionality	Due Date	Expiry Date	Publish Dates
the last day of the defined due month.			
Supports automatic re-enrolments	Yes	No	No
The course access period can be customized per person	Yes	No	No
The course access period automatically updates upon completion	Yes	No	No
The course access period updates upon re-enrolment	Yes	Yes	No
Define a period of early access prior to the due date	Yes	No	No
Changes to the course access period affect current enroled users	No	No	Yes
Automatic email alerts are available	Yes	Yes	No
Compatible with eCommerce	No	Yes	Yes

Assets and Course Components

Assets are the individual content units and components that make up the substance of a product.

Each asset has unique features. The following image gives a description of the available asset types.

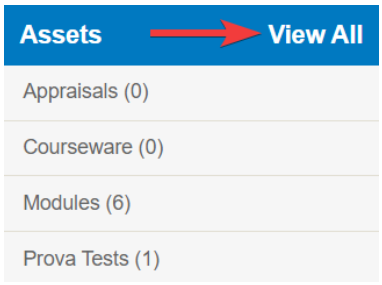


Navigate to Assets

Course Author Navigation

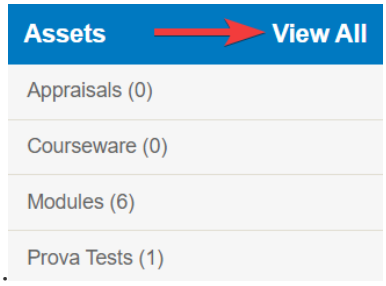
1. Navigate to products .
2. Select **Edit** for the applicable product.
3. Select **View All** to access the Manage Assets page. If you cannot see the menu, show the

Tool Panel .



Site Manager Navigation

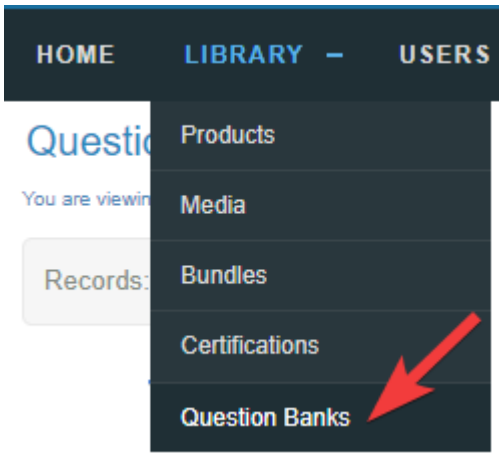
1. Navigate to products .
2. Select the product name to open the product.
3. Select **View All** to access the Manage Assets page. If you cannot see the menu, show the Tool Panel .



Navigate to Question Banks

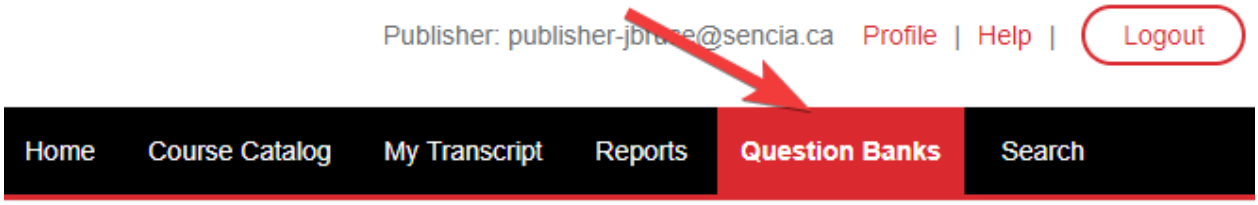
Site Manager Navigation

1. Select **Question Banks** from the Library tab.



Course Author Navigation

1. Log in with a course author account type.
2. Select **Question Banks** from the menu at the top of the page.



Tests

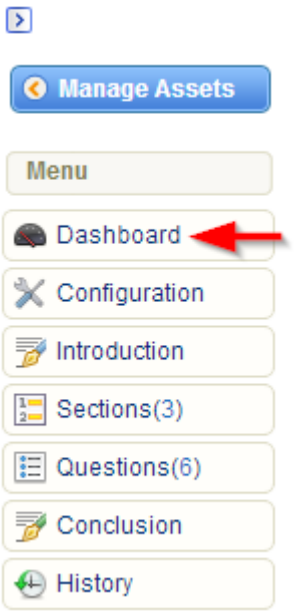
Tests are automatically graded and can be used to determine an individual's knowledge of your content. Apply passing grades, prerequisites, randomize answer options, create question pools, utilize multiple test sections, give feedback for answers, and offer a variety of question types. You can incorporate audio, video, graphics, hyperlinks and more.

Navigate to Tests

1. Log in with a course author or Site Manager account.
2. Navigate to products .
3. Select **Edit** next to the relevant product.
4. Select **View All** from the Asset menu or select the test assets to view only test assets.

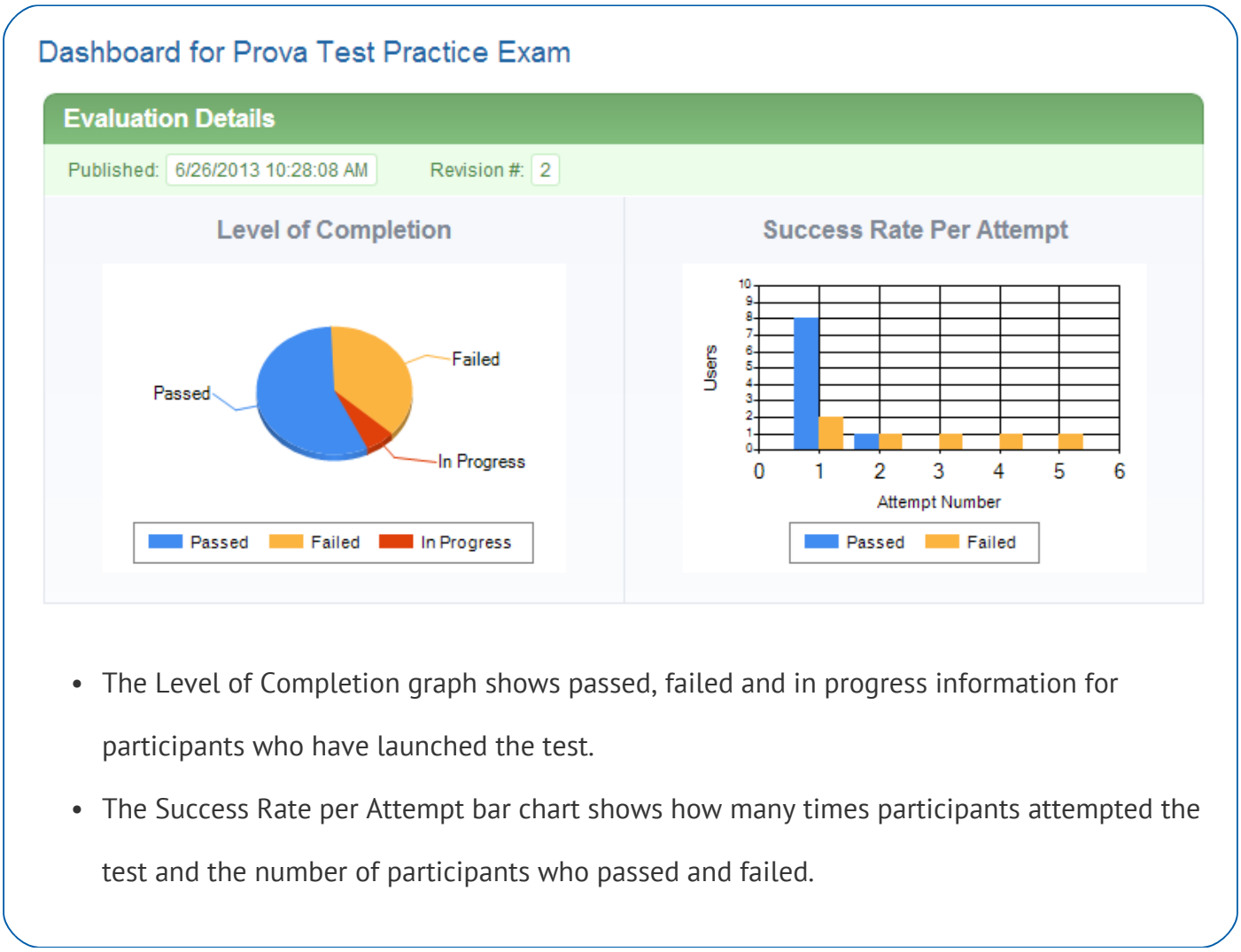


5. Select **Edit** next to a test to view the dashboard. Return to the dashboard at any time by selecting **Dashboard** from the test menu.



The Test Dashboard

Each test has a dashboard that shows basic at-a-glance analytics for a test, including the date the test was published and the current revision number.

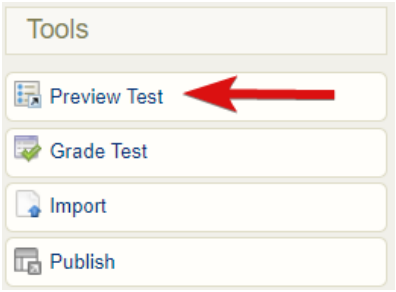


- The Level of Completion graph shows passed, failed and in progress information for participants who have launched the test.
- The Success Rate per Attempt bar chart shows how many times participants attempted the test and the number of participants who passed and failed.

Preview a Test

Tests can be previewed to view how learners will experience it and ensure that it looks and functions as intended. The preview launches an attempt of the test without retaining any records for the attempt.

1. Navigate to the test .
2. Select **Edit**.
3. Select **Preview Test** from the Tools menu.



Affidavits

An affidavit is a formal statement that a user must read and agree to as a requirement for a course or training material. To create an affidavit, you will need to associate it with a specific asset. You can only attach one affidavit to an asset. An affidavit can be attached to the following asset types:

- Modules
- References

Create an Affidavit

> Affidavits must be attached to module or reference assets. You can create an asset void of any content if you wish to display only an affidavit.

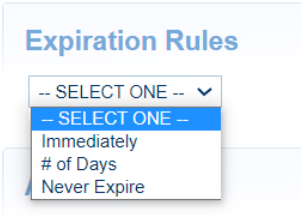
1. Navigate to an asset .
2. Select **Create Affidavit** from the properties menu. If there is already an affidavit attached to this asset, the menu will say View Affidavit instead.
3. Enter the **Title** of the affidavit.
4. Enter the **Content** that users must read and design the look of the affidavit using the content

editor .

5. Optionally require an **Electronic Signature**

   .

6. Optionally choose an **Expiration Rule** using the drop-down menu. This will not affect a user's prior asset completion based on the acceptance of an affidavit.

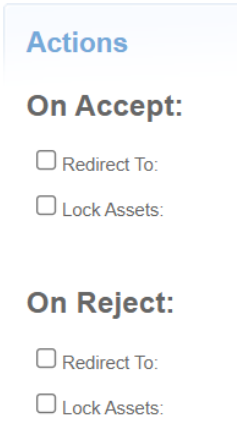


   a. Select **Immediately** to have users re-accept the affidavit each time they visit the asset.

   b. Select **Number of Days** to enter the number of days before the affidavit must be re-accepted.

   c. Select **Never Expire** if users do not need to re-accept the affidavit after the first time. This is the default behaviour.

7. Optionally select check boxes to define certain **Actions** when an affidavit is accepted or rejected. This can redirect users to a URL, a LMS page, or lock their access to a selected asset.



   a. Do Nothing. This is the default behaviour.

   b. Redirect to a selected asset within the same product.

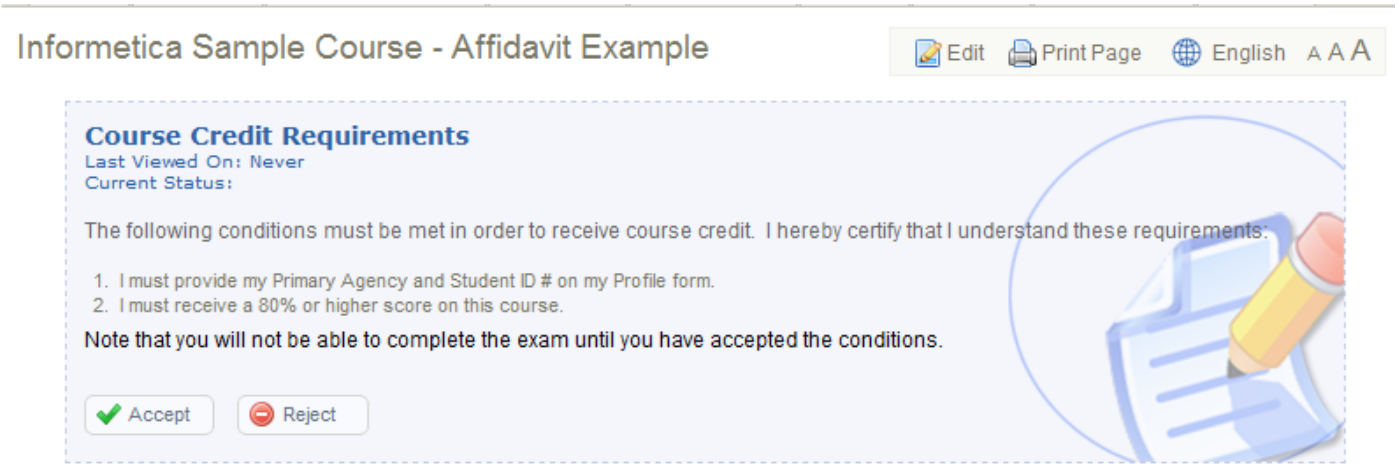
   c. Lock the Following Asset: The participant will not be able to access the asset.

8. Optionally **Add Display Rules** to define when an affidavit is presented to users. Select **Add** to apply one or more rules.

a. Display affidavit only when affidavit has not been agreed to

b. Display affidavit only when asset has not been viewed: Use the drop-down menu to select a product and the corresponding asset. Create multiple rules if you have more than one asset that must be viewed.

9. **Save**.



Edit an Affidavit

Editing an affidavit will reset the affidavit for everyone who already accepted the affidavit prior to the changes. This doesn't reset any previous completion of the asset based on acceptance of the affidavit, but will display the affidavit for re-acceptance.

1. Navigate to the affidavit .
2. Select **Edit**.
3. Make changes to the title, expiry, and text content as needed.
4. **Save**.

Affidavit History

The edit page shows prior versions of the affidavit at the bottom of the page, if applicable. This log

shows:

- Affidavit title
- User who created the affidavit version
- Number of days to expiry
- Text content/wording on the affidavit

Remove an Affidavit



A removed affidavit is permanently removed from the system. Historical data still appears on reports. A user's prior completion of an asset based on the acceptance of an affidavit is not affected.

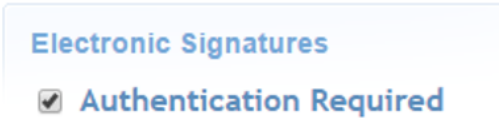
1. Navigate to the affidavit .
2. Select **Remove**.

Electronic Signatures

Add an electronic signature can be added to a module or reference asset using the affidavit tool. This can be enabled upon affidavit creation or during an edit. When enabled, the user will be forced to authenticate their rejection or acceptance of the affidavit by entering their username and password.

1. Create or edit an affidavit.
2. Locate **Electronic Signatures** on the affidavit form.

3. Select **Authentication Required** using the checkbox .



4. **Save**.