# Video Tutorials

## Introducing Informetica LMS

### Video Transcript

Introducing Informetica LMS

If your corporation is limited to developing in-person training, and not able to scale past a certain number of attendees due to confined space, or you are struggling to provide continuous learning opportunities that deliver certification that keep your company and regulatory compliance; welcome to Informetica.

Informetica is a cloud-based customizable LMS With your logo, your colours, your fonts, and your preferred language.

It's designed to house your professional development and corporate online training to keep your corporation compliant with the ability to deliver training to 100's or thousands of employees or learners, keeping everyone up-to-date and certified at a fraction of the cost of traditional training methods.

With the Informetica learning management system, you can easily manage and scale the online learning needs of your corporation with multiple employees, divisions, contractors, customers and partners worldwide, and deliver training 24 seven to your learners on the device that they prefer to use.

Deliver mandatory training and track employee compliance with electronic affidavits.

Run reports for individuals or groups to view your learners' affidavit interactivity.

Informetica also makes your administration tasks a breeze with data at your fingertips, and the ability to provide powerful reports in seconds with over 38 reports and counting.

Informetica's in- house developers and programmers provide world-class service, and are available when you need them with a proprietary support ticket system.

And if you have an older legacy system developed before the stringent data laws existed, don't let that hold you back.

Informetica's team will scrub and migrate your data to ensure you adhere to international guidelines, and you remain GDP are compliant.

Explore Informetica today and find out how we can build a custom LMS that addresses your challenges.

# How To Utilize Product Filters

See also Filter and Save Search .

## Video Transcript

How To Utilize Product Filters (Training For Site Administrators)

Welcome to Informetica's VIP Training Series

During this advanced training session, you will learn how to navigate and utilize the product filters on the products page to view existing products with the following steps;

1. Log into your Informetica LMS.
2. Select the library tab on the top navigation bar and select products.

Information is provided at a glance with a page navigation bar.

At first glance, you will be provided with:

- The product ID
- The name of the product
- The product type
- And the status (which can be active, inactive or master)
- The date the product was created
- The date product was edited
- Edit details

You also have the ability to copy the product on this page.

You will notice your advanced product filters:

In this section, a new product can be created in this area by clicking on the green plus create box and inputting the product details on the create product page:

1. Select the product type
2. Page title
3. Menu

4. The product completion indicator types
5. And the status
6. Select all to highlight and select all products

You will notice the scheduling tool is also accessible from this page if you have it enabled on your system.

Sort options are listed below:

You can filter by sorting from A to Z, or X to A.

Status is also available:

Select status to view active, inactive or master products.

Date created:

Sort from newest to oldest, and from oldest to newest.

Date edited:

Sort from the newest product to the oldest product, and oldest to newest.

From this section, you can type in the user ID to find your product.

You can also filter by sorting by typing in a full or partial search term of your specific product name.

You can select all campuses, or choose a specific campus from the Campus drop-down list.

You can also sort by user group:

Use the drop-down menu to select user groups to view their products.

You can sort by:

Status

Products can be viewed by status by clicking the status in the drop-down box and clicking on all, active, inactive or master.

Specific product types can be viewed by selecting:

Mandatory training, training program, instructor-led course, webinars and videos, trials, or document.

View specific assets by clicking on all, module, reference, assignment, evaluation, SCORM, wiki, markup document, questionnaire, prova test or appraisal.

Once you click on any of the options available in the advanced filter box, your system will display your preferred filter results.

That concludes this training on how to navigate and Utilize product filters on the products page.

I hope this was helpful.

Thank you so much for watching.

# How To Create Certification Paths And Certificates

## Video Transcript

How To Create Certification Paths And Certificates (Training For Site Administrators)

Welcome to Informetica's VIP training series.

During this session, you will learn how to create certification paths and certificates with the following steps:

1. 1.Log in as a site manager
2. Select the library tab on the top navigation bar
3. From the drop-down menu located under the library, select certifications
4. After selecting certifications, you will have access to a list of all certificates in the system listed alphabetically.
5. Navigate to the right-hand side of your screen to filter by specific certification, campus, or by user group

Once you select your filter parameters, you will only be shown the certifications that are available to the groups you have selected.

To create a certificate, select the create button located on the right-hand side of your screen and then create your certification details:

1. Select the name field in the certificate details page
2. Create your certificate name (required field)
3. Create a brief description about your certificate (this is an optional field)
4. Select the status (active or inactive – required field)
5. Choose the duration of the certificate (Never expires, expires in so many days, months or years. Optional field)

6. Allow recertification rules and select yes, or no

Please Note:
Now that we have completed the certificate detail section, it's time to create your certification rules - but before we get started, please note: Certification rules cannot be edited once they are saved.
If you need to change the rules in your certificate, you will need to create a new certificate with your updated rules, and go back and deactivate your previous certificate.

To continue, we are going to create our certification rules:

1. Scroll down to the certification rules box.
   If you are creating a certificate that requires users to pass one exam in a course to earn their certificate, place the number one in the box that states: a user has earned the certification after they pass one of the following.
2. Select the product or course from the drop-down menu. (Only active products will show up in the drop-down menu in this area.
3. Select the assets of the course in the drop-down menu (only active assets will be shown in the menu). An example of an asset could be a final test, a module, SCORM, assessments or evaluations.
4. Enter a passing grade as a percentage of the grade required to pass their evaluation.
5. Select add, and save rule

   Please note: two certifications may be identical, but the grade may differ. For example, the same rules might apply to an instructor and a user to earn a certificate, so the same exam must be taken. However: the instructor may be required to attain a higher passing grade, where as the general user may require a lower grade. In that case, you would be required to create two certificates because their criteria are different.

6. Scroll down to the assign user groups box where you will notice, filter campuses
7. Select the campus or campuses that the certification applies to
8. Select the user group or user groups that the certification applies to

You can click to highlight individual user groups and select either the add or remove button. You can also select multiple items by holding down the CTRL or shift keys or by clicking and dragging with your mouse.

Please note: Only users in the selected user groups are eligible to obtain the certification, even if they have set satisfied all requirements.

Now that you have filled in the required fields, you can create a certificate for your learners to print out.

1. Navigate to create your certificate. In this area, you can modify the input fields that are added to the certificate.
2. Add the certificate name
3. Add the first name and last name of the user
4. Add the certification date

You can also insert images into the certificate from your media library.

**Additional scenarios you may encounter:**

**Scenario 1:**

What if there were two courses, and the user could take one or the other to pass? We would keep the number of rules at one but add another rule.

In this case, you are going to add a second rule showing another course.

We will still add the passing grade, but now the users will only have to take one or the other to be certified.

Best Practices:

Always make sure you apply the right campuses and user groups.

When you save it, the certificate will appear in the list of your certifications.

**Scenario #2:**

What if users had already met the criteria of the certificate before the certificate was created?

1. Navigate to the library, certifications, and select: check eligible users. This will provide you with a list of all users, and you can select one, some, or all of them.
2. Approve your users
3. Select approve and OK

Now when you select the certificate, you will be provided with a list of names that have had the certification applied to their records.

That concludes this session on creating certification paths and certificates. I hope this was helpful. Thank you so much for watching.

# Creating Complex Certification Paths

Video Transcript

Creating Complex Certificates (Training For Site Administrators)

Welcome to Informetica's VIP training series.

During this advanced training session, you will learn how to create complex certification paths by using multiple "and" "or" statements that your Learner is required to follow, along with multiple rules to achieve a specific certification with the following steps:

1. Login as site manager
2. Select the library tab (top navigation bar)
3. Scroll down to Certifications. You will have a list of all certificates in the system listed alphabetically.
4. Select "Create" on the right-hand side of your screen
5. Fill in the certificate details with name of certificate
6. Select status (active or inactive)
7. Select Duration (expires, never expires, expires every 365 days)
8. Allow recertification (yes or no)

Scroll down to the certification rules.

PLEASE NOTE: Certification rules cannot be edited once they are saved.

If you need to change your certificate rules, you will need to create a new certificate with your updated rules, and go back and deactivate your previous certificate.

To continue with this training, we are going to create a certificate with multiple rules.

You could state; in order to obtain a certificate, a user must pass all mandatory Courses and a certain number of elective courses listed.

1. Select product
2. Select assets
3. Insert passing grade
4. Select the product from the asset drop-down menu
5. Select your provotest and insert 100%
6. Add
7. Save your rule
8. Do you wish to create the following rules? Select: OK
9. Review a breakdown of what you just added

   State: to obtain certification, the user must pass all mandatory courses and a certain number of elective courses listed.
10. Add the Courses Users can choose from. If this was mandatory, you could leave this at four. If they had to take all four assets or products, we could leave this as is and say "add."
11. Save rule

Now we are going to add an elective component and add elective courses that your Learner can choose from.

If we insert five courses, they could choose four of the five.

You'll notice that I inserted this quickly, and used the same steps that I recorded in the previous section of this video when we selected the additional rules to help speed up the process.

You will notice three rules have been completed successfully. You can add more if your certification requires additional courses to be added.

1. Scroll down and select your campus
2. Select available users (associated with the campus)

3. Save
4. OK
5. A pop-up box will appear, stating: "Your new certification was created successfully." Click OK

Review the certificate you just created by selecting the certificate in the certifications area.

From the same area, you can edit your user groups and check eligible users, and you can also create a printout or delete this if there are no users selected.

You can also deactivate the certificate in this area.

That concludes this advanced training session on how to create complex certifications. I hope this was helpful. Thank you so much for watching.

# How To Assign Learners To A Scheduled Training In Your LMS

## Video Transcript

Assign Learners To A Scheduled Training (Training For Site Administrators)

Welcome to Informetica‘s VIP training series.

During this session, you will learn how to assign learners to a scheduled training session, or sessions, with the following steps:

1. Log in as site manager
2. Select Library from the top navigation area
3. Select Scheduling Tool. Now you will be able to select a scheduled class you wish to assign to your learners.
4. Select edit on the right side beside scheduled class name. You can view the criteria that was selected and input for the scheduled class.
5. From the right side of the menu select "add enrolment"
6. Select the campus and user groups your learner belongs to
7. Click on search and the entire list of learners will display in this area
8. Select individuals by clicking on the box beside their name or select all learners by clicking on the box at the very top
9. Select the blue register button at the top of the list and a pop-up box will appear that states: are you sure you would like to register these users? Select yes or no
10. Once “users registered successfully” appears click OK

Now you can click on the class list to create an attendance sheet and select your file of choice with HTML or XL.

A list will be created and populated with the names of all those registered for your course.

That concludes this session on how to assign learners to schedule training.

I hope this information has been helpful. Thank you so much for watching.

# How To Create an R224 Scheduled Course Enrollments Report

## Video Transcript

Run R224 Schedule courses Report (Training For Site Administrators)

Welcome to Informetica's VIP training series.

During this advanced training session, you will learn how to generate an R224 scheduled course enrolments report and save your defined searches.

The R224 will generate a list of users enroled to one or more scheduled courses, along with their dates of enrolment, dates of completion, and their enrolment status, with the following steps:

1. 1.Login to your Informetica LMS
2. Select the reports tab on the top of your navigation bar
3. Select report wizard

You will notice a list of reports available to you. You can also view scheduled reports by section. Scroll down to the user account reports and select the R224 from this area.

Alternatively, you can also select the R224 in the above search box
Or, you can insert one or two words that relate to the report that you are searching for.

A description of the R224 report will display the title, description of the report, and all fields available to you in the report.

You can select step two below, or navigate to the top and select the second tab “user groups”.

Now we are going to navigate to the filter by campus box and select the campus/s you want to include in your report by highlighting the available campus.

For the sake of this demo, I will select "All" so that we can grab some data.

The user groups below are shown based on the campuses that you have selected above. You can select the user group name in the search box or you can select them below.

Continue To Step Three:

1. In the filter products box, enter the name of your product
2. Select product on the right hand side in the product library
3. You can also select "All" or "None"
4. Select the published status (published, unpublished or published and unpublished)
5. Select the activity status (active, inactive or master)
6. Scroll down to the filtering schedule toolbox and insert your scheduling tool name and select it on the right hand side.
7. Select one location or all
8. Navigate to filter user list and type in the username or select user names from the user lists
9. Select status (registered, registration pending or inactive)
10. Select the type (proctor or learner)
11. Select the enrolment status (pending, approved, registration revoked, dropped, completed, expired, automatically generated, absent, no-show)

12. Scroll down to the scheduled course start date

    These boxes are optional, and you can select a date range that is relevant to the current date in either one of these boxes, and select: yes,select today, yesterday, this week, or last month. These are all optional fields.

13. From - To: Insert a date and time range
14. Save filters box (select save)

    For your convenience, we have added the save filters box so that you can save filters for your report which will eliminate going through the steps every time you need to generate this type of report.

    Select save filters and you will notice a Save Search create box appears.

15. Insert the name of your report
16. Select save search
17. Select the saved searches box on the report wizard page
18. Select the report from that area and it will load all of your parameters for you so that you can just click on launch report
19. Select your desired format (HTML, XL or CSV) and your report will appear

You will notice some interactive elements on your report. You can expand and view campuses, expand and view user groups, expand and review scheduling tools, and you can also scroll down and select your user, and expand his user group area so that you can review the user groups he belongs to.

You can view his enrolment date, finish date, enrolment status, and status change dates.

That concludes this training on how to create an R224 scheduled course enrolment report and save your defined searches.

I hope this was helpful. Thank you so much for watching.

# How To Generate an R603 Systems Registrations Report & Save Your Defined Search

## Video Transcript

How To Generate An R603 Systems Registrations Report And Save Your Defined Search (Training For Site Administrators)

Welcome to Informetica's VIP Training Series

During this advanced training session, you will learn how to generate an R603 system registrations report and save defined searches.

Run the R603 report to view user accounts created within a defined date range based on account creation or last login with the following steps:

1. Log into your Informetica LMS
2. Select reports tab on the top of your navigation bar
3. If you are logging in as site manager, select the report wizard from the drop-down menu

Your system will generate a list of reports available to you, and you can also view by list or section. If you sort by sections, scroll down to the security area and select the R603.

You can also select this report by entering one or two words into the search box.

A display of the 603 report will provide you with the title, description and the fields.

4. Select user groups on the top tab (or select step 2 the bottom of the page)
5. Navigate to the filter by campus box and select the campus you would like to select on your report by highlighting one or all of the campuses available
6. The available user groups will be shown based on the campuses you have selected. The user group search box helps you search for a specific group by inserting the name above.
7. Select the user group or user groups and select step three.
8. Navigate to the user type name, which is an optional field. (Leaner, proctor, all)
9. Select the user status name which is optional: select all, registered, registration pending, active, inactive)
10. From the account creation date range, select a date range that is relative to the current date. This is also optional.
11. Select the last login date. This is an optional field
12. Select save filters to save your filters for this report to eliminate going through these steps every time you need to generate this type of report.
13. Select save filters on the bottom right-hand side, and a save search create box will appear.
14. Title the name of your report
15. Insert a description
16. Select save search

Now when you go into save searches, you will be able to select this report and launch it below from a list of your saved searches.

17. Select launch report
18. Select a format to launch your saved report and select the output you desire: HTML, XL, or CSV

Once the report generates, you will notice a report header in the data that is available below it with;

-the learner's name

-email

-enrolment date

-user group count

-user groups (which you can expand)

-classification

-department managers

-general contractors

-managers

-the status

-registered

-account type

-participant

-and the last login date

That concludes this training on how to generate an R603 systems registrations report and save your defined searches.

I hope this was helpful. Thank you so much for watching.