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OnPoint Course Manager (OPCM)

9.0 Administration

The last available menu choice button (of eight possibilities) in Course Manager's dropdown menu system is the **Administration Menu**. When clicked, this primary level menu option opens to reveal a number of submenu options that provide direct access to all administration and system configuration-related parameters that comprise your OnPoint system. Each administration-related submenu option selected from the **Administration Menu** button will display a table listing of records pulled from the OnPoint database specific to the selection made.

Depending upon your assigned security profile and granted permissions, the **Administration Menu** button has as many thirteen submenu choices as shown in Figure 9-1 below:

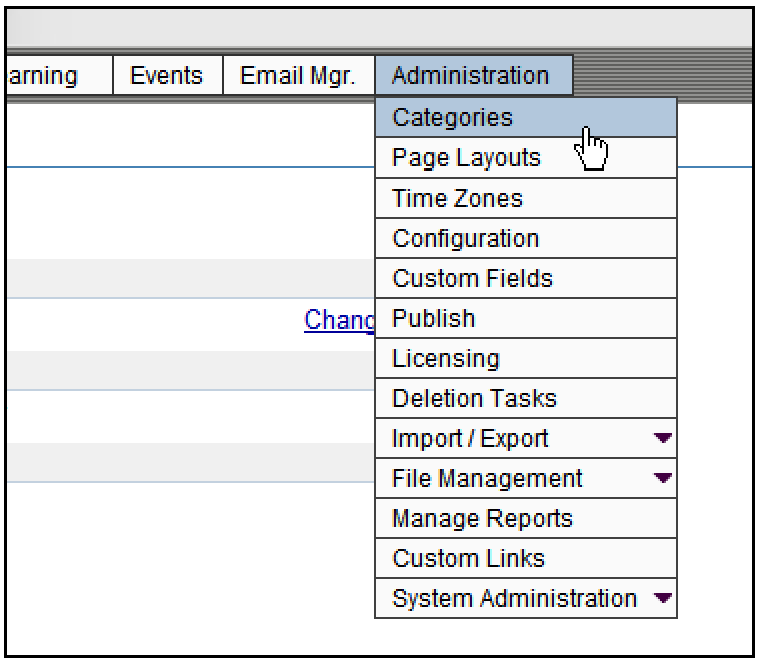


Figure 9-1 Administration Menu with All 13 Submenu Selections

Administrative Menu Selection Overview

*Categories Submenu Selection***.** This link opens the Categories Management screen where Category labels are created and managed making table displays easier to navigate across the entire Course Manager application. All administrator-level accounts have access to the Categories submenu and can create new or edit existing categories.

Page Layouts Submenu Selection. This link provides a table where content developers and site administrators can upload and manage all of the standard and customized style sheets and template backgrounds they use to format **Pages**.

Time Zones Submenu Selection. This selection allows Root/Site Administrators to define all of the relevant and unique time zones their user population may physically reside in. Time zone assignments are generally used to help manage/normalize start and ending times for instructor-led classes, webinars and broadcast live streaming sessions referred to as **Events**.

Configuration Submenu Selection. This selection allows Root/Site Administrators to manage many of the unique setup and configuration parameters they may need to access or update in order to maintain the current active customer slice/server instance. For more information on using the Configuration Dropdown menu, please refer to OnPoint *Course Manager Installation Guide*.

Publish Submenu Selection. This selection allows Content Administrators and Root/Site Administrators to create off-line versions of online **Courses** and **Mobile Courses** that can then be distributed on CD-ROM/DVD-ROM disks or localized to a file server rather than requiring online course assess. This feature provides for the generation of an off-line course that contains all of the high-level Course Information as well as all of the **Topics**, **Pages** and **Assets** contained in that course excluding any **Assessment** capabilities. Separate selections are available for (a) outputting the entire off-line version of a **Course** or (b) outputting just the Course **Assets** (to support **Users** with localized **Assets Locations** configurations).

Licensing Submenu Selection. This selection allows Root/Site Administrators to manage and upgrade their Customer License information using unique encryption keys provided by OnPoint's Support Team for the selected/current customer slice. Customer Licenses can be upgraded online to increase the number of user/learner accounts and author/administrative accounts for any customer. Pool Licenses for dedicated servers are updated using the Systems Administration->License Pool option located at the bottom of Administration menu for Root-level Administrators.

Deletion Tasks Submenu Selection. This selection permits Content Administrators and Root/Site Administrators to review any unused content flagged as "Request Delete" in the shared database repository and delete these selections from the system if appropriate. Site Administrators can also delete an entire **Course** at once, including all associated **Topics**, **Pages** and **Assets**, using this function.

Import/Export Submenu Selection. This selection provides automated tools for importing either course content or users from other systems or digital sources as well as provides tools for exporting existing courseware from OnPoint's Course Manager for use in other standards-based systems.

File Management Dropdown Menu Selection. This selection provides a set of utilities for uploading new information (e.g., asset files) in bulk into the shared object repository. In addition, these same utilities allow Root/Site Administrators to find and download any collection of Assets, style sheets, reports or other unique content stored within Course Manager.

Manage Reports Menu Selection. This selection provides a set of utilities for managing the standardized JSP-based reports used by administrative users in Course Manager and also provides functionality to upload new JSP reports as offered or authored internally.

Custom Links Submenu Selection. This selection is used for customer installations with custom application or database integration (e.g., connection to a third party Learning Management System or HRIS platform).

System Administration Dropdown Menu Selection. This selection provides a set of utilities accessible by Root Administrators used to perform system setup and specialized configuration tasks. When selected, 3 choices are displayed including "Manage Customers", "System Configuration" and "License Pool". For more information on using the Configuration Dropdown menu, please refer to OnPoint *Course Manager Installation Guide*.

9.1 Administration: Categories

Any administrator with access to Course Manager can create and manage **Categories** (considered as higher-level labels or captions) that make it easier to navigate displayed information presented in the various table displays found in the Course Manager application. There is no limit on the number of Categories permitted and they may be named or numbered to suit the individual tastes of content creators and administrators who need to structure and organize Course Manager's shared information repository. Typical Category assignments might include examples like "Action Items", Marketing", "Sales Training 2005," or "Product TR-4000 Operations."

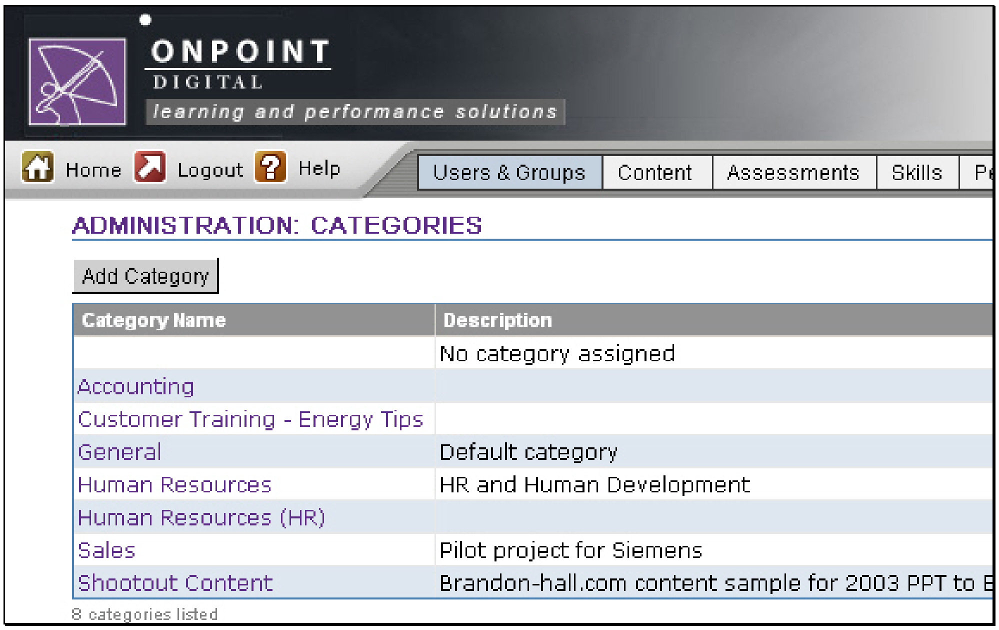


Figure 9-2 – Categories Table Display

Selecting the Categories submenu selection from the Administrative Menu displays the Administration: Categories display table that lists all of the **Category** assignments managed by Course Manager. From this list, you may:

1. Select a Category record from an alphabetically displayed Category List to review or prepare to edit your selection by clicking on the blue Category Name field; this action will launch the Administration: Category screen to review your selection. (See Figure 9-3 below).

Figure 9-3 – Categories Table Display

2. If you need to edit an existing category record, click the Edit button to access the Administration: Category – Edit screen where you can make your updates as needed. Click the Save button to commit your changes. (See Figure 9-4 below).

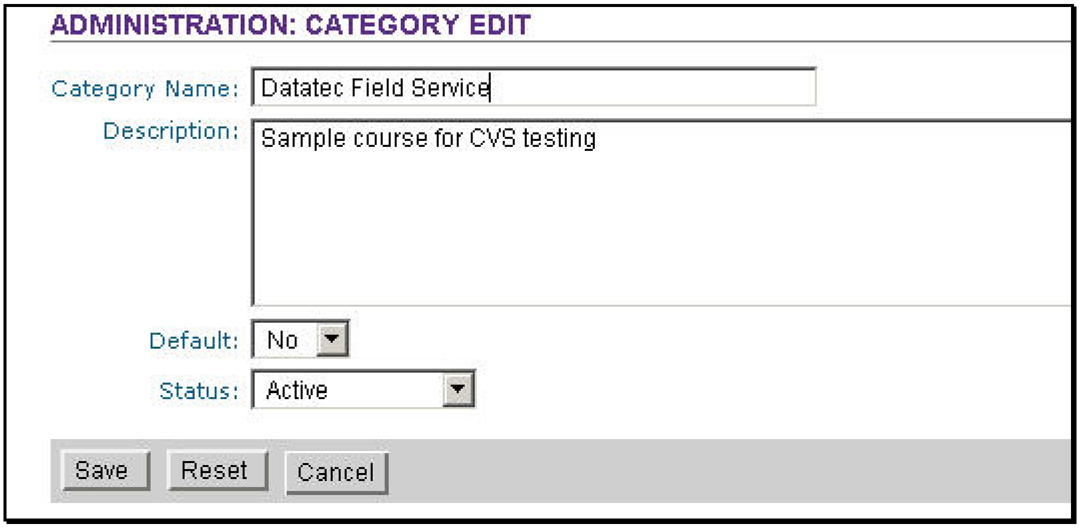


Figure 9-4 – Category Edit Display

Adding / Updating Categories

3. Click the Add Category button to create a new Category; this action will launch the Administration: Category edit screen (as shown in Figure 9-4 above but blank) to create a new Category record.
4. You can identify/configure any category as a "default" category if you desire to simplify content creation and management tasks in much the same way you can set category-specific filters for either the Content and Assessment top-level level menu selections.

Category Record Format

The typical Category record has the following information (see Table 9-1 below):

You may change any of the following data fields:

Element	**Description**
Category Name:	The name of the Category.
Description:	A detailed Natural language description of the Category.
Default:	Indicates whether this category serves as a global default for all course manager tasks.
Status:	Indicates the Status of the Category displayed. Choose from the pull-down list:

- Active = Category in use (default)
- Request Delete = Category no longer needed

Once you've entered/updated the Category, select one of the following Action buttons:

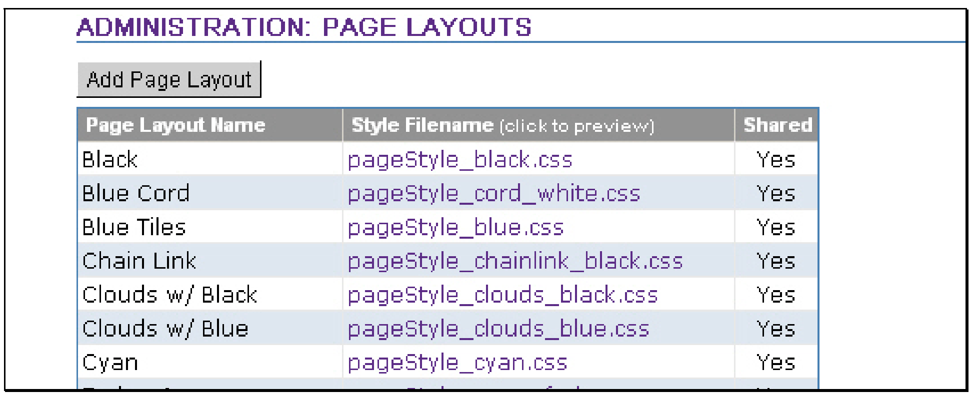
Action Buttons	Description
Save	Click the Save button to update the Category list and return to the Administration: Categories display list.
Reset	Click the Reset button to erase your current changes and start editing again.
Cancel	Click the Cancel button to return to the Administration: Categories screen. Your changes will not be saved.

9.2 Administration: Page Layouts

To help present information in a more uniform and polished manner, OnPoint's Course Manager allows content creators and administrators to select from a library of style sheets and template backgrounds that help to provide a more consistent look and feel to online and offline courseware. Page Layouts can be either simple backgrounds or detailed Cascading Style Sheet (or *.CSS) documents depending on your needs. Backgrounds provide standard wallpaper upon which **Assets** are positioned and then presented to users. Cascading style sheets include both the background template as well as detailed descriptions of which fonts to employ and the point sizes to use for titles and body text alike.

Selecting the Page Layouts submenu selection from the Administrative Menu displays the Administration: Page Layouts display table which lists all of the Page Layout assignments managed by Course Manager (see Figure 9-5 below). From this list, you may:

1. Select a Page Layout record from an alphabetically displayed Page Layout List to review or edit by clicking on the blue Page Layout Name field; this action will launch the Administration: Page Layout edit screen to edit your selection, or
2. Click the Add Layout button to create a new Layout; this action will launch the Administration: Page Layout edit screen to upload a new Page Layout record.


ADMINISTRATION: PAGE LAYOUTS

Add Page Layout

Page Layout Name	Style Filename (click to preview)	Shared
Black	pageStyle_black.css	Yes
Blue Cord	pageStyle_cord_white.css	Yes
Blue Tiles	pageStyle_blue.css	Yes
Chain Link	pageStyle_chainlink_black.css	Yes
Clouds w/ Black	pageStyle_clouds_black.css	Yes
Clouds w/ Blue	pageStyle_clouds_blue.css	Yes
Cyan	pageStyle_cyan.css	Yes

Figure 9-5 – Page Layout Table Display

Adding / Updating Page Layouts

The typical Page Layout record has the following information (see Figure 9-6 below):

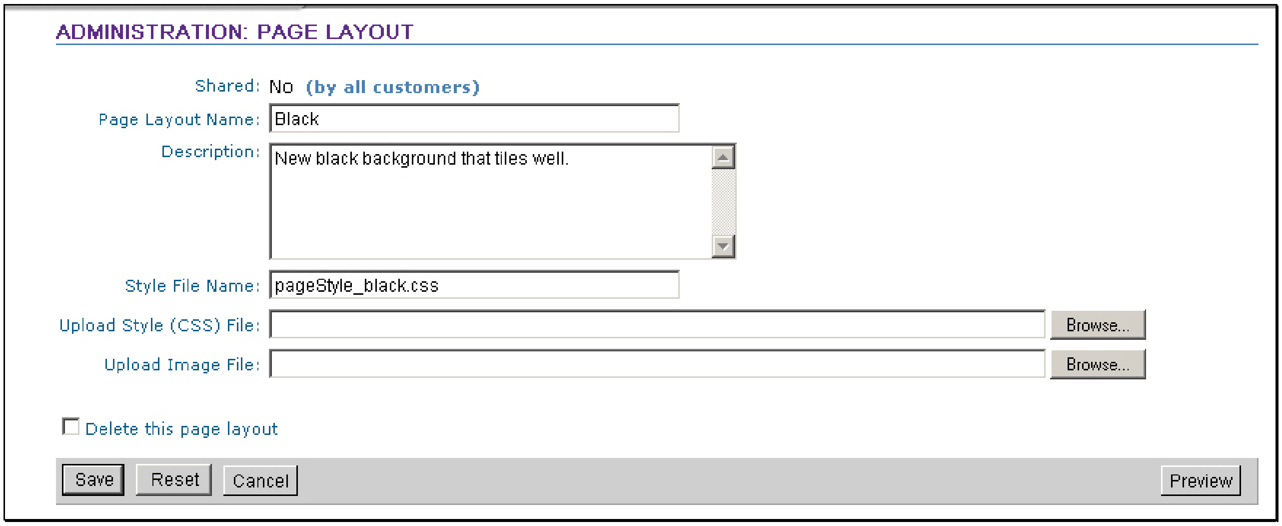


Figure 9-6 – Page Layout Record

You may change any of the following data fields:

Element	Description
Shared:	(By all customers). Logic field for Root/Site Administrators that indicates whether a CSS file is shared across customer slices on dedicated servers.
Page Layout Name:	The assigned name of the Page Layout.
Description:	A brief description of the Page Layout.
Style File Name:	The name of the background image or cascading style sheet that has been stored in the database for this Page Layout.
Upload Style (CSS) File:	A Browse feature used to find, select and upload a new Page Layout file as a CSS file.
Upload Image File:	A Browse feature used to find, select and upload the associated image called by a new Page Layout CSS file.
Delete Layout:	**Click this checkbox to delete the selected Page Layout.**

Once you've added or updated the Page Layout record, select one of the following Action buttons:

Action Buttons	Description
Save	Click the Save button to update the Page Layout list and return to the Administration: Page Layouts display list.
Reset	Click the Reset button to erase your current changes and start editing again.
Cancel	Click the Cancel button to return to the Administration: Page Layouts screen. Your changes will not be saved.
Preview	Click the Preview button to view the Page Layout record.

9.3 Administration: Time Zones

This selection enables Course Manager Root/Site Administrators to define all of the relevant and unique time zones their user populations may physically reside in. Time zone assignments are generally used to help manage and normalize all of the starting and ending times for live streaming **Events** when broadcasting real-time sessions to your users over the Internet.

Selecting the Time Zones submenu selection from the Administrative Menu displays the Administration: Time Zones display table which lists all of the defined and unique time zones used across your enterprise (see Figure 9-7 below). From this list, you may:

1. Select a defined Time Zone record displayed by GMT ("Greenwich Mean Time") offset to review or edit by clicking on the blue Time Zone Name field; this action will launch the Administration: Time Zones edit screen where you can review/edit the record; or
2. Click the Add Time Zone button to add a new Time Zone; this action will launch the Administration: Time Zones edit screen where you can define a new Time Zone record.

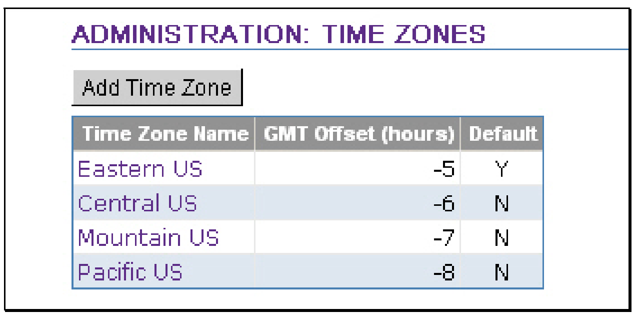


Figure 9-7 – Time Zones Table Display (all defined)

Adding/Updating Time Zones

The typical Time Zone record has the following information (See Figure 9-8 below):

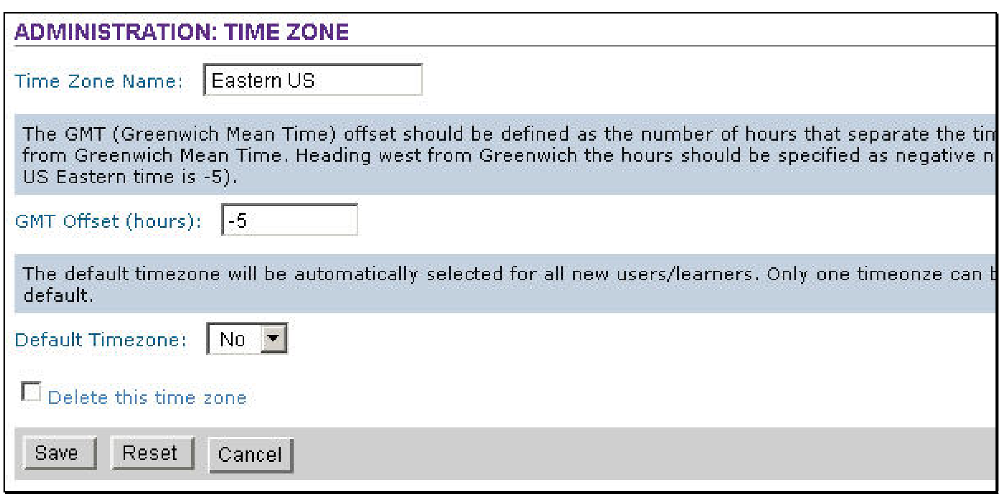


Figure 9-8 – Time Zone Definition Screen

You may change any of the following data fields:

Element	Description
Time Zone Name:	The assigned name of the time zone.
GMT Offset (hours):	A numerical value that defines how many hours difference there are between the selection time zone vs. Greenwich Mean Time ("GMT")
Default Time Zone	Selectable logic field (Y or N) normally set to your organization's home location time zone.
Delete Entry:	Select this checkbox if you need to delete a previously defined Time Zone.

Once you've entered/updated the Time Zone record, select one of the following Action buttons:

Action Buttons	Description
Save	Click the Save button to update the Time Zones list and return to the Administration: Time Zones display list.
Reset	Click the Reset button to erase your current changes and start editing again.
Cancel	Click the Cancel button to return to the Administration: Time Zones screen. Your changes will not be saved.

Note: *Though there are 24 defined Time Zones (or more if installing in India for example), you may wish to create your own Time Zone Name and GMT Offset hours record to help identify a state, region or country more easily. For instance, California is in the Pacific Time Zone. You may want to create a Time Zone called "California" instead, so that authors could select that time zone for a user rather than accidentally making a mistake by choosing Mountain Time Zone.*

9.4 Administration: Configuration

NOTE: *Select hosted customers (and all OnPoint prospects performing 14-day LMS/LCMS hosted evaluations) may not have all of these options in their Administrative dropdown menu.*

This selection allows **Root / Site Administrators** to manage all of the unique setup and configuration parameters they may need to access or update in order to maintain their unique server instance or enterprise installation. This submenu is only available to the highest-level administrative personnel.

Updating Customer Slice Configurations

Selecting the Configuration Submenu selection from the Administrative Menu displays a configuration table with four different editable sections to update the current customer slice for Content Viewer, Course Manager, Assessment-specific configuration information and Application Help. (See Figure 9-9; only a partial menu is shown.)

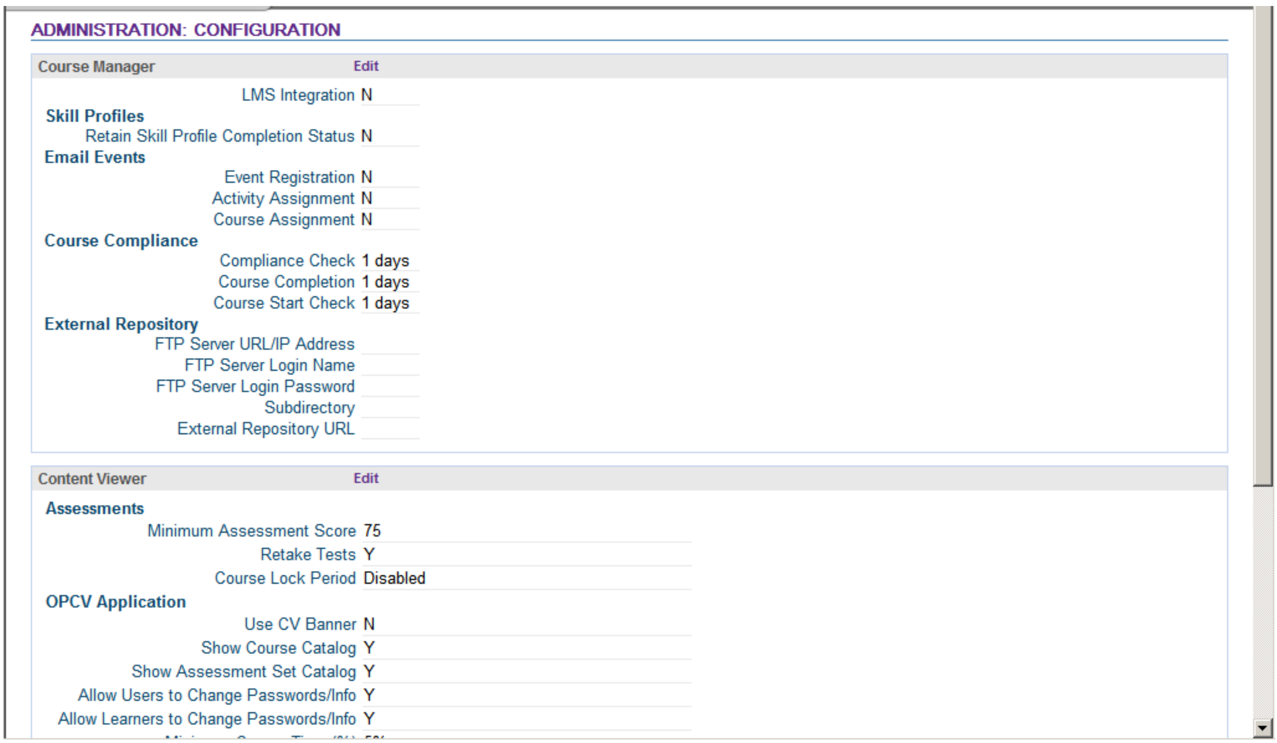


Figure 9-9 – Consolidated Administration > Customer Slice Configuration

To update any of the four sets of configuration-specific parameters, click the **Edit** link to the right of the configuration section you need to update and the appropriate edit screen will appear. Any changes can be input into the fields provided and will be committed to the database when you save your changes.

The following Action Buttons are displayed on all three of the Configuration Submenu screens detailed in this section:

Action Buttons	Description
Save	Once you've entered and updated the configuration parameters for the

selected configuration section, click the Save button to return to the Administration: Configuration screen.

Reset Click the Reset button to erase your current changes and start editing again.

< Configuration Click the < Configuration button to return to the Administration: Configuration screen.

9.4.1 Course Manager Configuration

Figure 9-10 below shows the summary view of all of the existing configuration parameters accessible by Root and Site-level Administrators for the OnPoint Course Manager application.

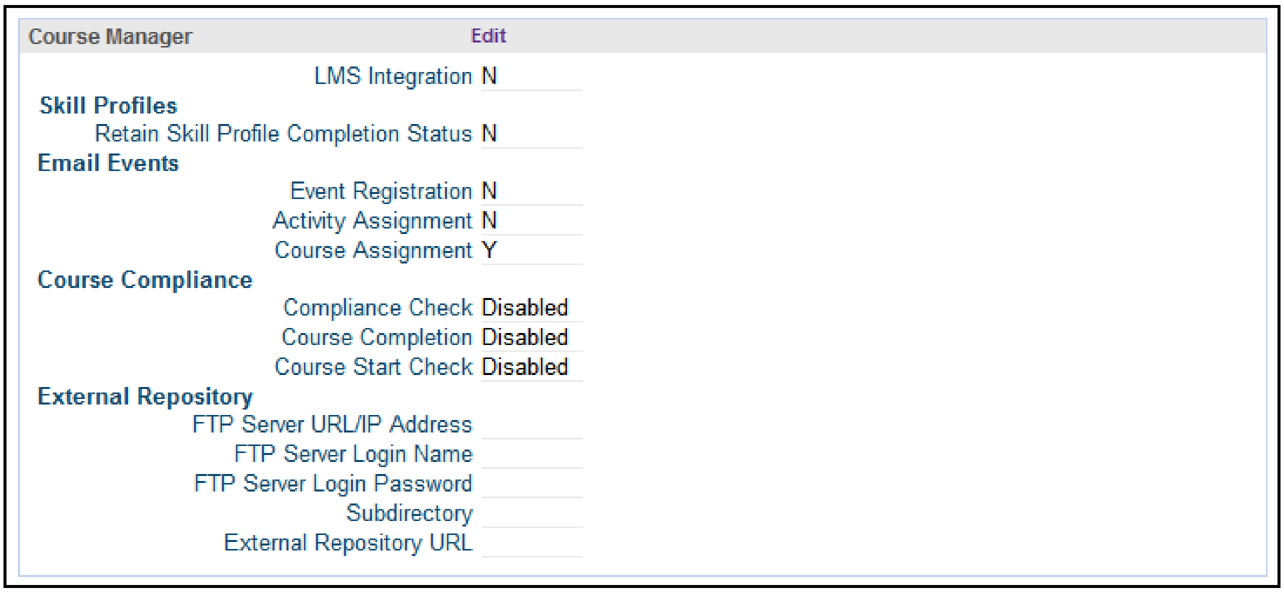


Figure 9-10 – Course Manager Configuration Settings

Course Manager Configuration Screen. Allows Root/Site Administrators to set general parameters and default settings for their Course Manager slice. From this display, Site Administrators can specify the following:

a. *LMS Integration.* For customers wishing to integrate OnPoint's Course Manager application as a Learning Content Management System ("LCMS") with their existing Learning Management System ("LMS") platform, setting this radio button parameter to "Yes" will activate embedded functionality that activates various integration features to support select 3rd party LMS platforms. (See Figure 9-11 below to see the configuration details).

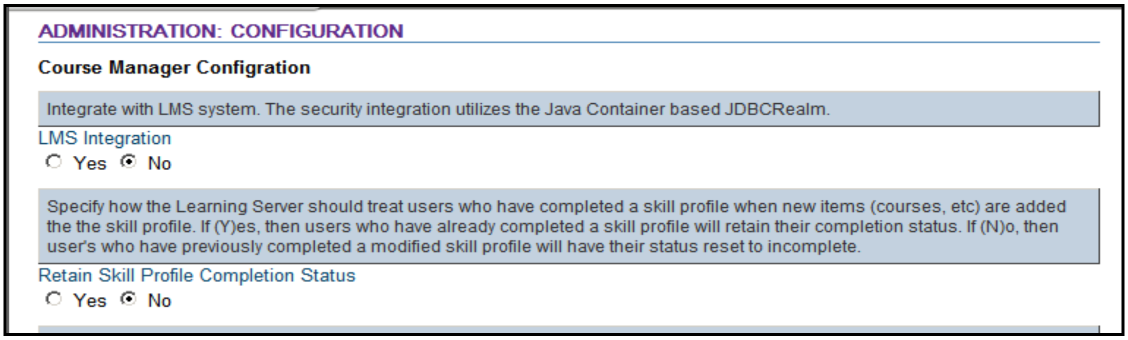


Figure 9-11 – Select Course Manager Configuration Settings

b. *Skill Profiles - Retain Skill Profile Completion Status*. Used to specify how the OnPoint Learning Server should treat **Users/Learners** who have completed a **Skill Profile** when new items (**Courses**, **Assessment Sets**, **Events**, etc) are added to a previously completed **Skill Profile**. If set to "**Y**"es, then **Users** who have already completed a **Skill Profile** will retain their attained completion status. If set to "**N**"o, then Users/Learners who have previously completed a modified **Skill Profile** will have their status reset to "Incomplete". Refer to Figure 9-11 above for more details.

c. *Email Events – Email Event Notification Configuration*. You can configure your system to specify whether or not **Course Manager** will generate and send messages when defined conditions are met (see Figure 9-12 below for details). These parameters determine whether or not **Course Manager** will auto-generate email messages when event or activity-related actions occur due to learner requests or submissions. The defaults for the two parameter fields include:
   i. *On Event Registration Approval*. When activated and set to "Yes", this option results in the auto-generation of an email notification sent to the email address of any **User/Learner** that has requested and been approved by a **Root/Site administrator** or **Event Manager** to attend any defined Event. Emails are sent within one minute of this approval being granted.
   ii. *On Activity Assignment*. When activated and set to "Yes", this option results in the auto-generation of an email notification to the assigned **User/Learner** from the system that informs them they have been assigned an **Activity** to perform or complete. Once complete, the learners must close out their assigned **Activities** by completing the Activity Completion Screen accessible via **Content Viewer**. Emails are sent within one minute of this assignment being made.
   iii. *On Course Assignment*. When activated and set to "Yes", this option results in the auto-generation of an email notification to the assigned **User/Learner** from the system that informs them they have been assigned an online **Course** to complete. Emails are generally sent within one minute of this assignment being made.

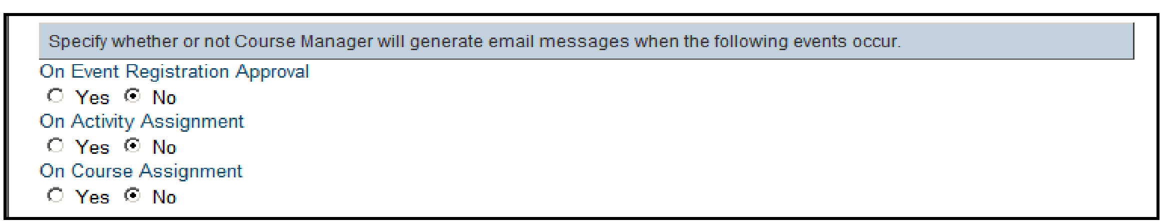


Figure 9-12 – OPCM Event Email Configuration Settings

d. *Course Compliance – Compliance Notifications*. Activation of this functionality helps organizations to calculate and auto-generate email message reminders to all **Users/Learners** who have been assigned specific Courses where timely completion of the courseware material is tied to organizational or occupational compliance. The functionality has two inter-related components; the first is determining which conditions need to be tracked related to Course Completion Compliance and the second component models the format and content of the notification sent to users who don't meet the prescribed condition. Configured conditions leverage notification templates that can be edited and updated with time and condition-sensitive information that is sent out to Users/Learners based on their notification preferences – as an email, as a notification sent to Content Viewer or an OnPoint Portal, or sent out as an SMS message to a User's/Learner's cellular phone. See Figure 9-13 below for details.

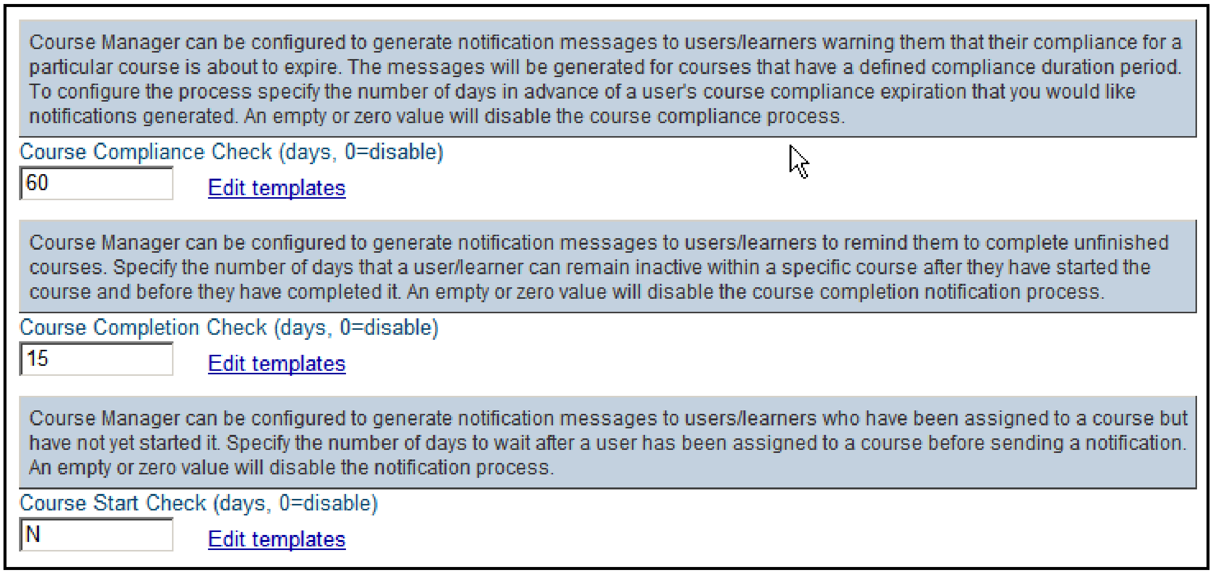


Figure 9-13 – Course Manager Course Compliance Notifications

The three (3) current Course Compliance notifications are as follows:

i. *Course Compliance Check.* Course Manager can be configured to generate notification messages to users/learners warning them that their compliance for a particular course is about to expire. The messages will be generated for courses that have a defined compliance duration period. To configure the process specify the number of days in advance of a user's course compliance expiration that you would like notifications generated. An empty or zero value will disable the course compliance process.

ii. *Course Completion Check.* Course Manager can be configured to generate notification messages to users/learners to remind them to complete unfinished courses. Specify the number of days that a user/learner can remain inactive within a specific course after they have started the course and before they have completed it. An empty or zero value will disable the course completion notification process.

iii. *Course Start Check.* Course Manager can be configured to generate notification messages to users/learners that have been assigned to a course but have not yet started it. Specify the number of days to wait after a user has been assigned to a course before sending a notification. An empty or zero value will disable the notification process.

Once any of the aforementioned Course Compliance parameters have been activated, Administrators can click on the Edit Template link and customize the notification template for that condition. Each template defines a set of variables that can be calculated and inserted into the auto-generated notification bound for a User/Learner who is meeting the established condition (see Figure 9-14 for an example).

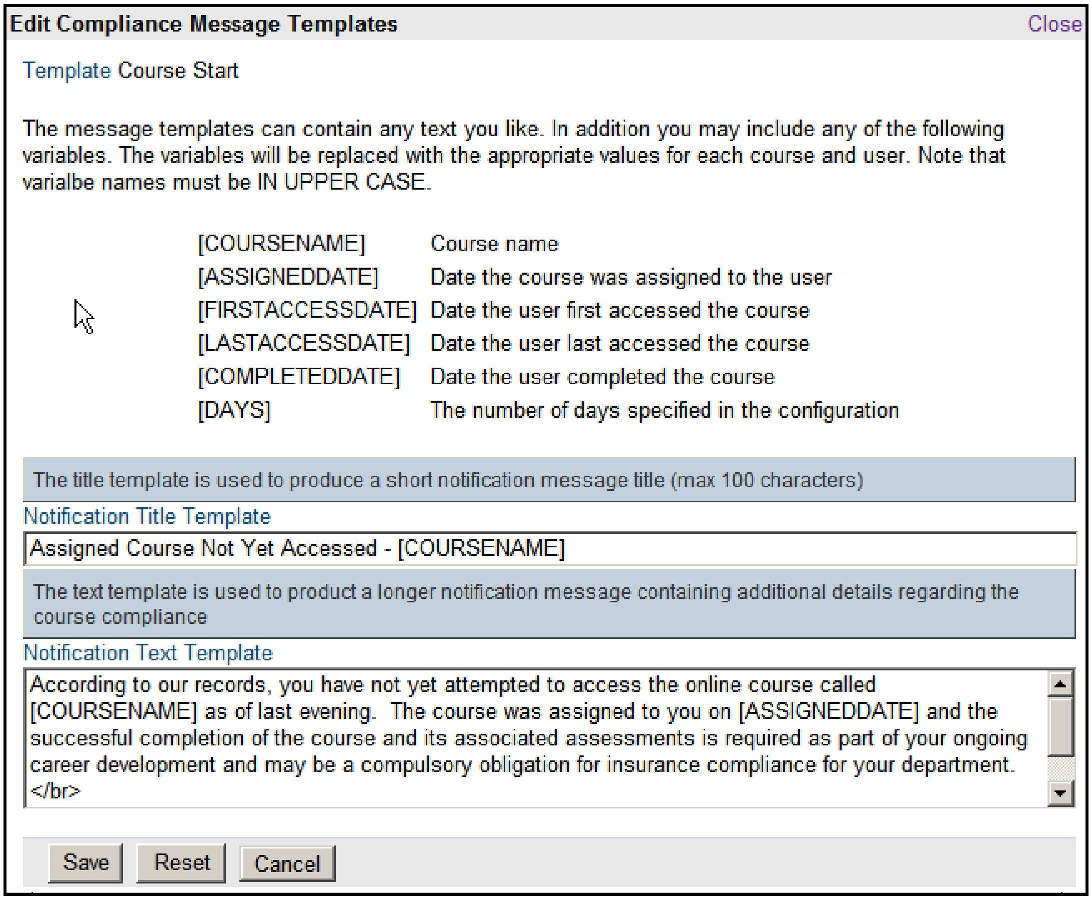


Figure 9-14 –OPCM Course Compliance – Notification Template

e. *External Repository Configuration.* The OnPoint Learning Server can optionally be configured to utilize an external repository for selected **Assets** that can help address bandwidth limitations or enhance security measures for select content/**Assets** for both hosted and enterprise implementations. To establish an alternative external repository for your content, specify an external destination on a browser-accessible platform and provide access instructions that facilitate uploads of content to that site; this sort of access is generally established using the file transfer protocol ("FTP") to access external web servers or via a Uniform Naming Convention ("UNC") path (e.g., \\Server\Training\) to access a file server somewhere in your enterprise. Once an external repository has been defined/activated in Course Manager, Content Authors and Administrators will be presented with an optional "Use External Repository" checkbox when uploading new content to the OnPoint database. To establish an external repository, specify values for the following fields:

i. **FTP Server URL or IP Address.** Supply the full FTP path (or UNC path) to the external repository.

ii. **FTP User (Login Name).** Supply the login name for the FTP site. This will be passed to the FTP site automatically when accessing the external repository.

iii. **FTP Password.** Supply the password for the FTP site. This will be also passed to the FTP site automatically when accessing the external repository.
iv. **FTP Subdirectory.** Specify a specific subdirectory to store content/assets uploaded to your external repository if needed.
v. **External Repository URL.** Specify the URL path (or UNC path) that will be used to retrieve content from the external repository. Think of this as a "prefix" address that gets appended to the absolute file name that launches your content.

9.4.2 Content Viewer Configuration Screen

Allows Root/Site Administrators to set general parameters and default settings for the Content Viewers their users/learners use to access their Learning System. (See Figure 9-15 below). From this display, Root/Site Administrators can specify the following configuration parameters:

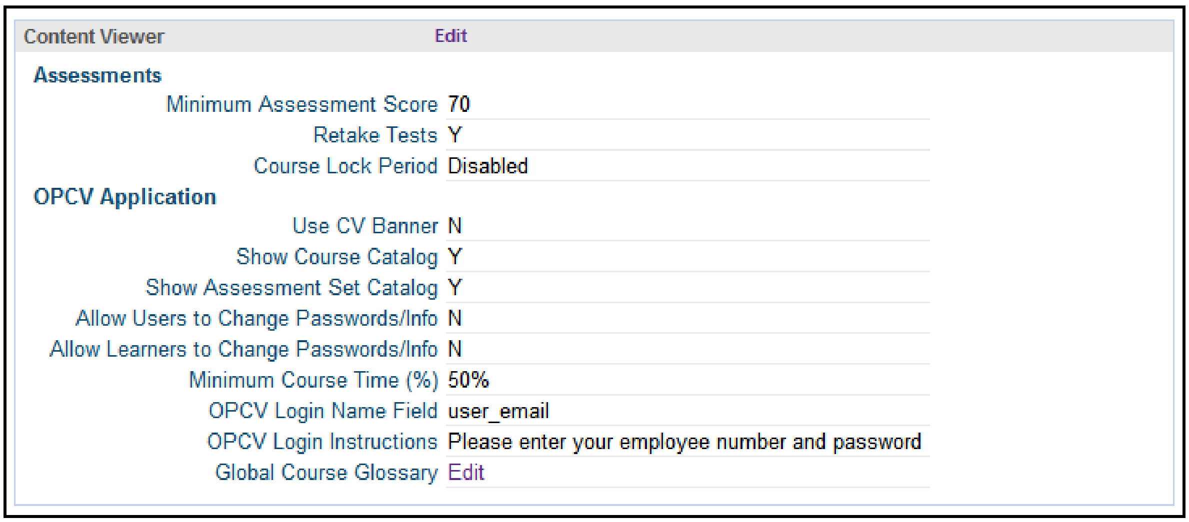


Figure 9-15 – Content Viewer - Configuration Parameters Summary

9.5 *Assessments - Minimum Score*. This parameter specifies the minimum passing score that learners need to achieve to satisfactorily complete courses managed on the Learning Center. The default value is normally a passing score of "70". This value is overridden by any value entered in the Assessments area and specifically associated with a Test (see Figure 9-16 below).

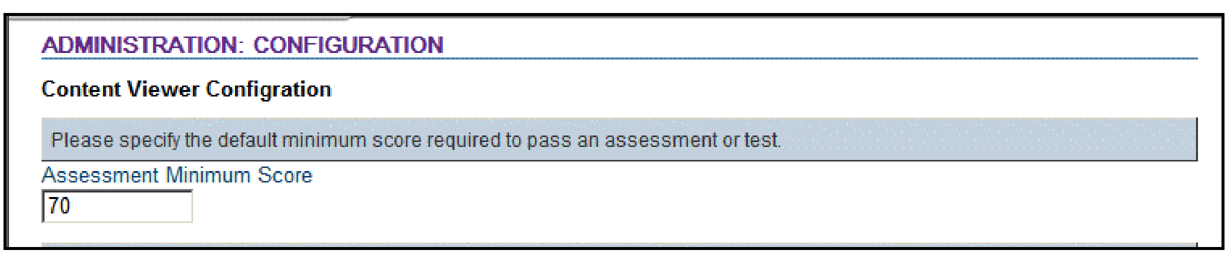


Figure 9-16 – Content Viewer – Assessment Minimum Score Configuration Compliance

9.6 *Assessments - Retake Tests.* This parameter allows Root/Site Administrators to specify whether or not Users/Learners can retake a previously completed Assessment (Test or Feedback form) when retaking a previously completed Course. If set to “Yes”, the user will be able to see the Assessment again and a new score version will be recorded. If this parameter is set to “No”, Users/Learners browsing a previously completed Course are presented a message that informs them they have already taken the Assessment and can’t retake it again (see Figure 9-17 below).

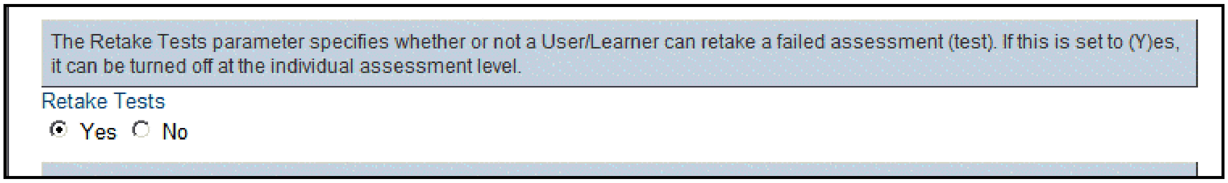


Figure 9-17 – Content Viewer – Assessment Minimum Score Configuration

9.7 *Assessments - Lockout.* This global system parameter specifies the default number of hours that users/learners will be locked out of an **Assessment** if they fail it. Enter zero (0) to disable default assessment locking or enter any value to activate the lockout feature. Root and Site Administrators can then activate lockouts for any Assessment they care to and also change the default lockout period from the default value to any other period they deem appropriate (see Figure 9-18 below).

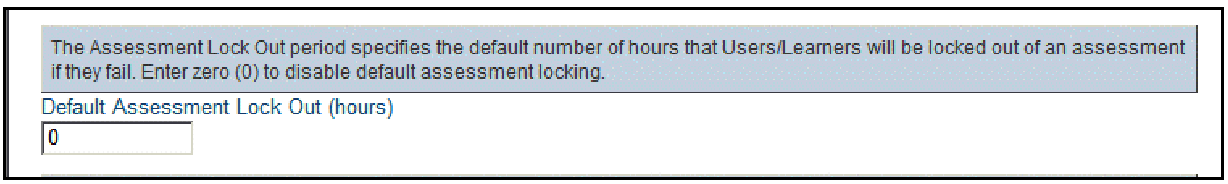


Figure 9-18 – Content Viewer – Assessment Lockout Configuration

9.8 *OPCV Banner Display.* To help maximize screen real estate when taking a Course or Assessment, Root and Site Administrators can set configure whether to display or hide the standard branded banner that appears at the top of the Content Viewer interface whenever a User/Learner is inside a Course or Assessment Set. Setting this parameter to “Y”es yields back about 80 pixels of additional display resolution (see Figure 9-19 below).

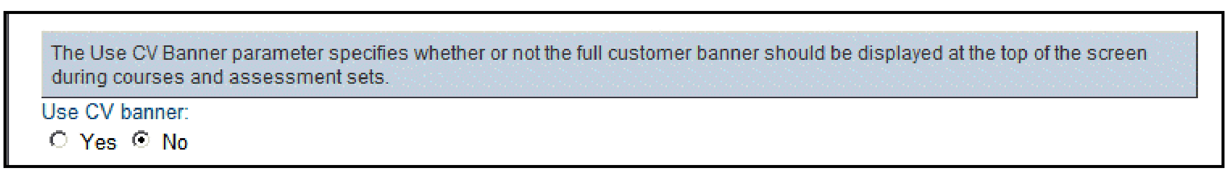


Figure 9-19 - Content Viewer – OPCV Banner Configuration in Course Mode

9.9 *Default Catalog Display Configurations*. This global system parameter specifies whether Courses and Assessments that have been published in Course Manager will be displayed to Users/Learners when they are in the Content Viewer. If these parameters are set to “No”, no Catalogs will be made available in OPCV (see Figure 9-20 below).

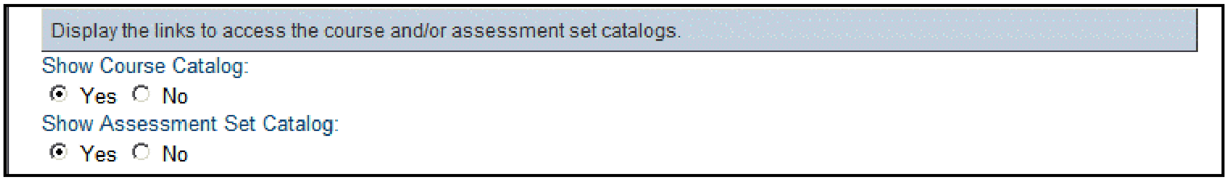


Figure 9-20 - Content Viewer – User-Viewable Catalog Configurations

9.10 *Allow Users to Change Passwords/Personal Information*. This configuration parameter enables the ability to Administrators to grant permission to their Users/Learners to change/update their access passwords and personal information if they choose or are required to. Most organizations following centralized account administration procedures and/or using Single Sign-On access will NOT choose to permit these functions (see Figure 9-21 for details). **Note**: Enabling these functions works in either the Content Viewer or Portal interface.

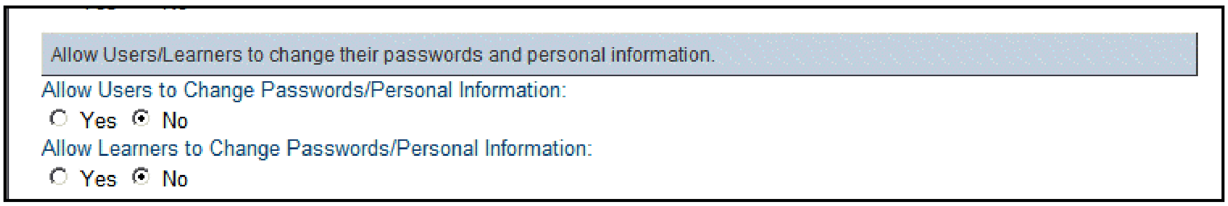


Figure 9-21 - Content Viewer –Configuration Enabling User Updates to PW/Info

9.11 *Define Minimum Course Time:* This global parameter defines the minimum time (as a percentage of the estimated total course duration) that a User/Learner must spend in a Course in order to Pass/Complete each Course. For example, if a published Course has a defined duration of 60 minutes and the Administrator has specified this parameter as "50" (meaning 50 percent), Users/Learners must spend a minimum of 30 minutes in the Course in order to earn a favorable completion status. While the default value is set to "0", the recommended value should be 20% or so to ensure Users/Learners do not page through their Assignments just to get to the Assessments. See Figure 9-22 for more details.

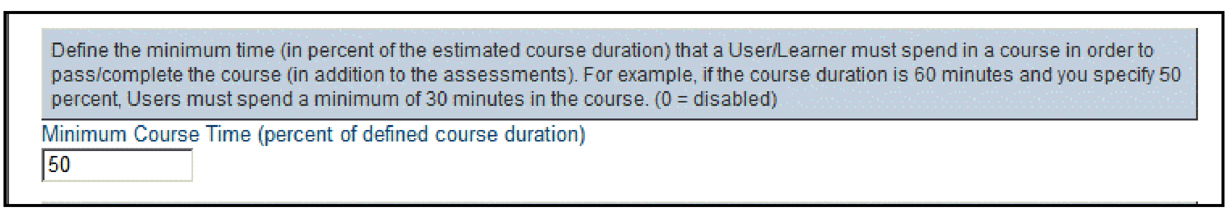


Figure 9-22 - Content Viewer – Minimum Course Time Configuration

9.12 *Default Login Field Configuration:* This global parameter specifies the validated field from the OPDB User table that will be used to authenticate a User's login into OPCV (or into the OnPoint Portal if installed). Administrators can select the designated field from the list available in the drop down menu as shown below in Figure 9-23. The available options include several of the User-specific fields including any of the ten (1) custom fields defined for the Server Slice.

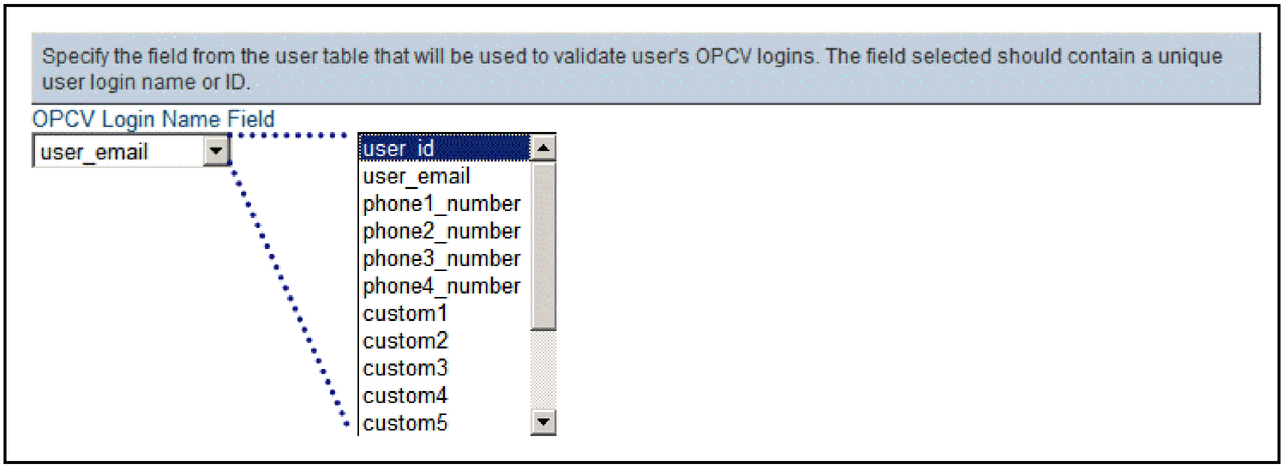


Figure 9-23 - Content Viewer – Default Login Name Field Configuration

9.13 *Login Instructions*. The configurable parameter allows Administrators to customize the login message that appears to Users/Learners when they are presented the login page for the Content Viewer. This allows organizations that may use different types of login credentials (e.g., Employee ID, email address, unique login name) to present a more descriptive message to these Users/Learners when they encounter the login page (See Figure 9-24 below).

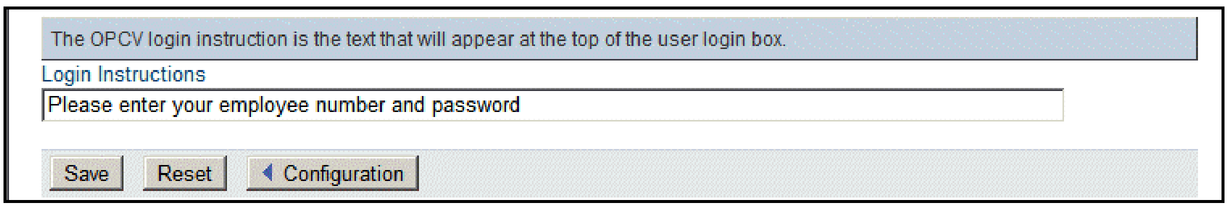


Figure 9-24 - Content Viewer – Login Instruction Definition

9.14 *Global Glossary Feature. This feature is accessible via a* link (see Figure 9-25 below) at the bottom of the Summary-level Configuration Parameters Screen and allows Administrators to enter terms and definitions for a Global Glossary that can be displayed to Users/Learners in any Course that are taking. To add or edit a global level glossary entry, click the Edit link and a master list of terms will display (see Figure 9-26 below). Click the Add button to enter a new term or click the name link to an existing glossary item to edit or update or delete that record (see Figure 9-27). All entries added to the Global Glossary list appear in alphabetical order.

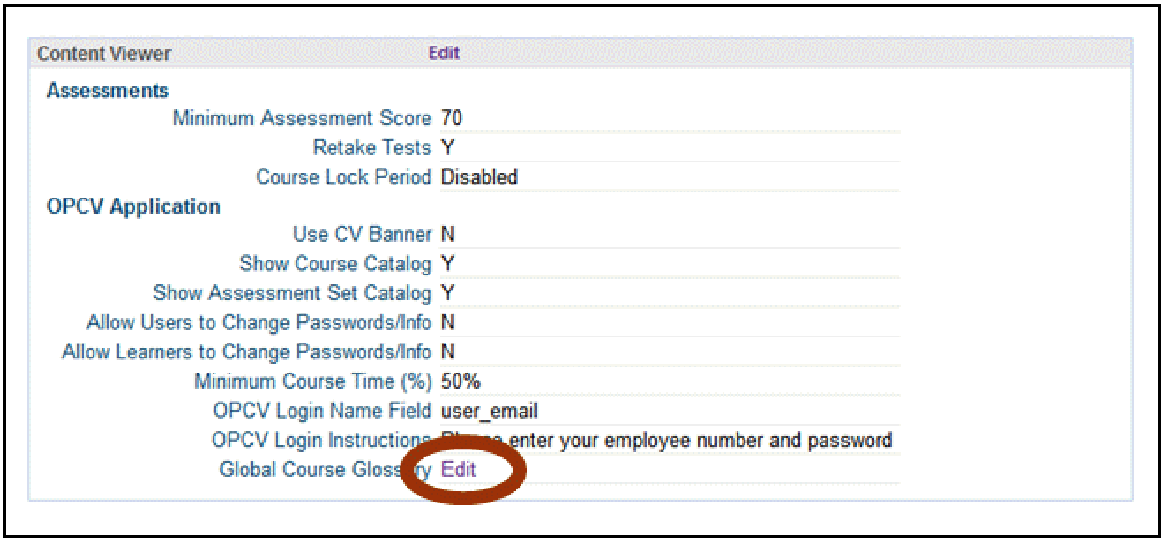


Figure 9-25 - Content Viewer – Global Glossary Edit Link

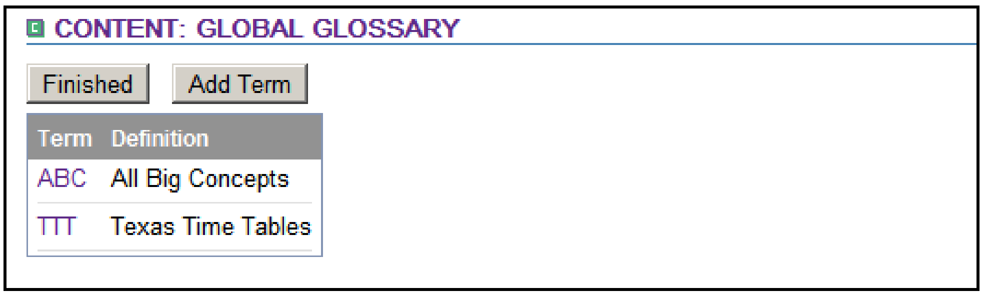


Figure 9-26 - Content Viewer – Global Glossary Master List

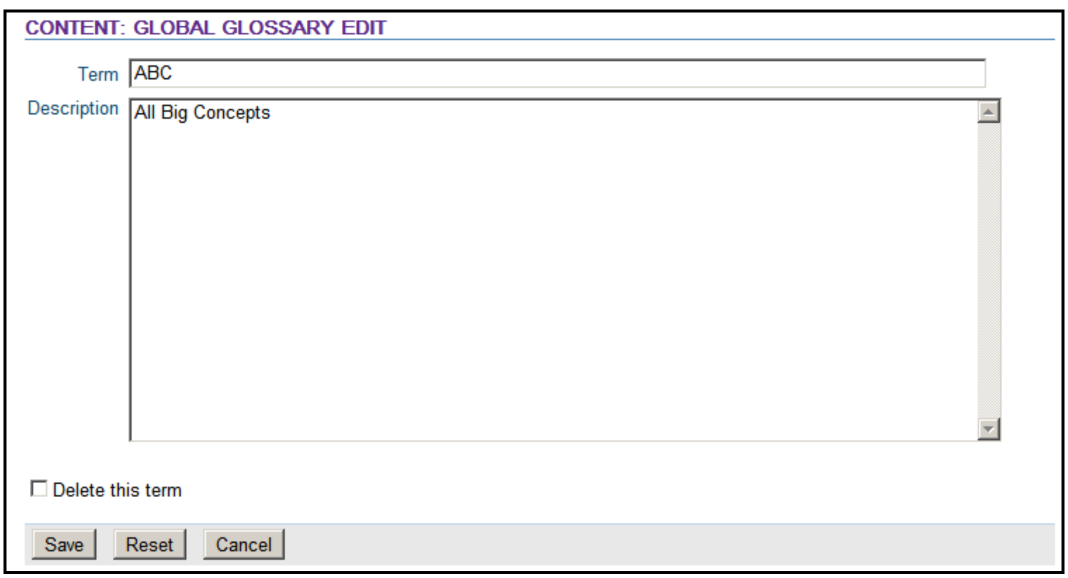


Figure 9-27 - Content Viewer – Global Glossary Edit Link

9.4.3 Assessment Remediation Response Configuration Screen

This feature allows Root/Site Administrators to set default remediation responses that display when an OnPoint-created assessment/test has been configured to deliver remediated responses to a User/Learner for both Correct Messages and Incorrect Messages (see Figure 4-28 below). To edit or update these messages, click the Edit link and update the appropriate message fields as shown in Figure 4-29.

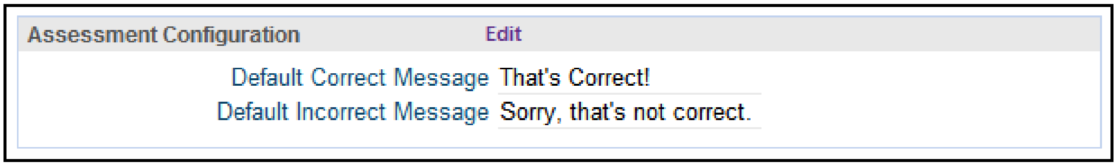


Figure 9-28 – Assessment Default Remediation Configuration

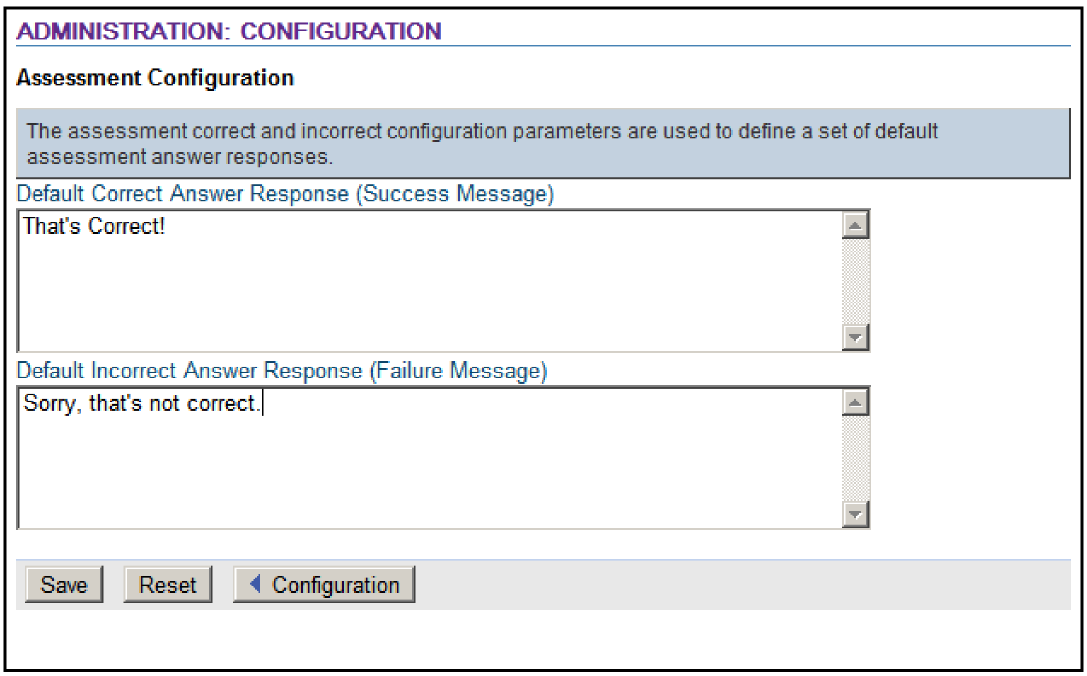


Figure 9-29 – Assessment Default Remediation Edit Screen

9.4.4 Application Help Configuration Screen

Some organizations may wish to create their own Help Files that Users/Learners will access when they click the "Help" button in the Content Viewer. To accommodate this, this configurable parameter allows Administrators to point to any HTML-compatible content they'd like to display in place of the standard OnPoint Help Files. For example, this can be a custom PDF file or a series of HTML pages that provided organization-specific assistance. See Figure 9-30 for an example.

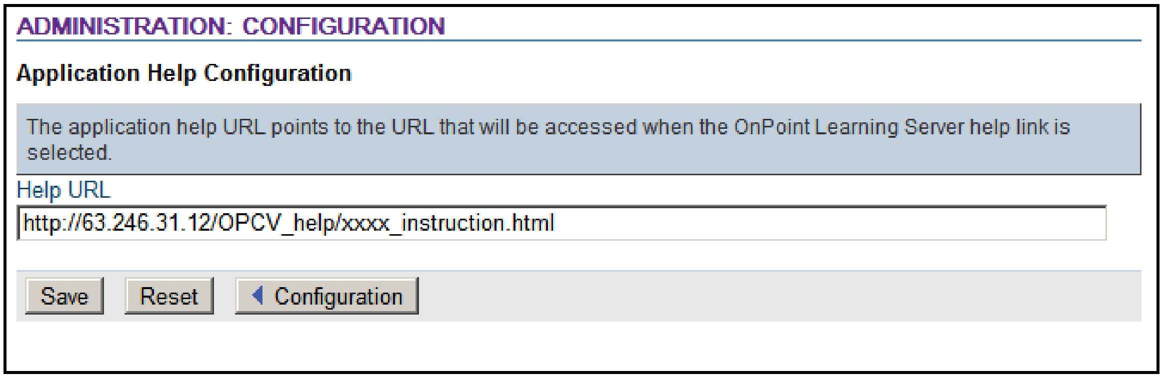


Figure 9-30 - Content Viewer – Global Glossary Edit Link

9.5 Administration: Custom Fields

NOTE: *Select hosted customers (and all OnPoint prospects performing 30-day solution evaluations) may not have all of these options in their Administrative dropdown menu.*

This selection allows Root/Site Administrators to manage all of the unique setup and configuration parameters they may need to access or update in order to maintain their unique customer slice/server instance or any enterprise installation. This submenu is only available to the highest-level administrative personnel.

Updating Custom Fields

Allows Site Administrators to establish custom fields tracked in the database that assist in better describing and classifying an enterprise's Courses, Groups, Users and Events. Administrators simply provide "field captions" for previously established fields already allocated in the system's database tables. These fields can later be used for searching and reporting purposes. (See Figure 9-31 below).

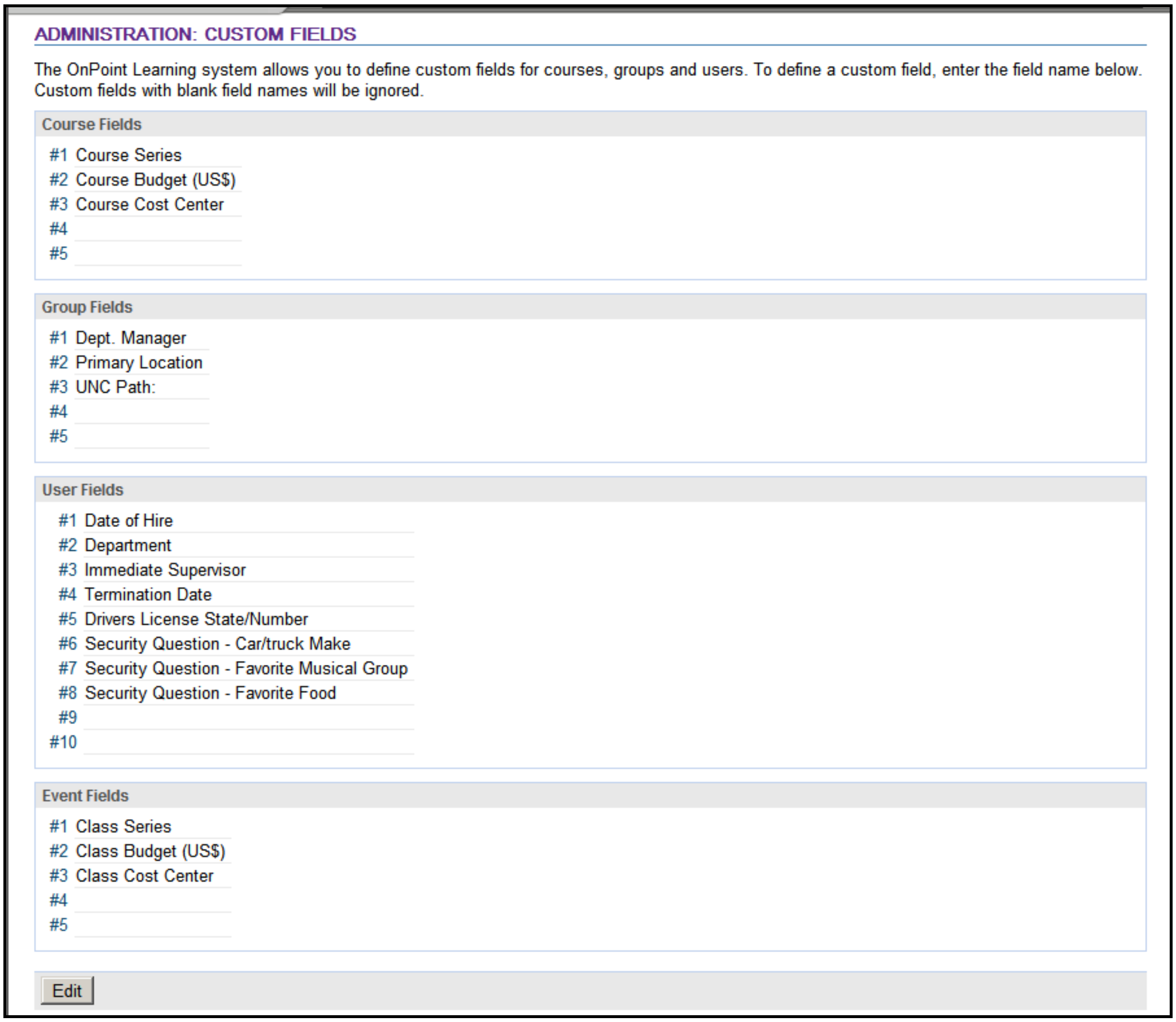


Figure 9-31 –Custom Fields Assignment Screen

From this display, Root/Site Administrators can specify the following configuration parameters:

a. *Course Fields.* Allows Root/Site Administrators to establish up to five supplemental custom fields at the Course level that may assist an organization in describing and classifying their courseware for their learners. Typically, these fields are used to add fields like “Course Series” and “Content Vendor”.
b. *Group Fields.* Allows Root/Site Administrators to establish up to five supplemental custom fields at the Group level that may assist an organization in describing and classifying distinct groups used to segment their user populations. Typically, these fields are used to add fields like “Region”.
c. *User Fields.* Allows Root/Site Administrators to establish up to five supplemental custom fields at the User level that may assist an organization in better describing and classifying their learners and users. Typically, these fields are used to add fields like “Employee ID#” and “Direct Manager”.
d. *Event Fields.* All Root/Site Administrators to establish up to five supplemental custom fields at the Event level that may assist an organization in describing and classifying their Instructor-Led Training classes, Webinars and Live Streaming Events for their learning communities. Typically, these fields are used to add fields like “Class Series” and “Class Budget”.

To update any of the three sets of custom fields, click the Edit button and the **ADMINISTRATION: CUSTOM FIELDS EDIT** will appear. Any changes can be input into the fields provided and will be committed to the database when you save your changes.

The following Action Buttons are displayed on at the bottom of the Custom Field Entry Screen:

Action Buttons	Description
Save	Once you’ve entered/updated any custom field values you require, click the Save button to return to the Administration: Custom Fields screen.
Reset	Click the Reset button to erase your current changes and start editing again.
Cancel	Click the Cancel button to return to the Administration: Custom Fields screen.

9.6 Administration: Publish

This selection enables Content Administrators and Root/Site Administrators to create off-line versions of online Courses that can then be distributed on CD/DVD-ROM or localized to a file server rather than requiring online course access. This feature automates the generation of a complete series of files and directories that contains all of the high-level Course Information as well as all of the Topics, Pages and Assets contained in the selected course. Separate selections are available for (A) outputting the entire off-line version of a course or (B) outputting just the Course Assets to support Users with localized Assets Locations configurations. (See Figure 9-32 below).

NOTE: *Due to the lack of an active database for an offline course, the ability to include an OnPoint Assessment (quiz, test or survey/feedback form) with an offline course requires integration with the optional OnPoint Portal module. Please contact the OnPoint Support Team for more information on how to synchronize offline tests results with online training results.*

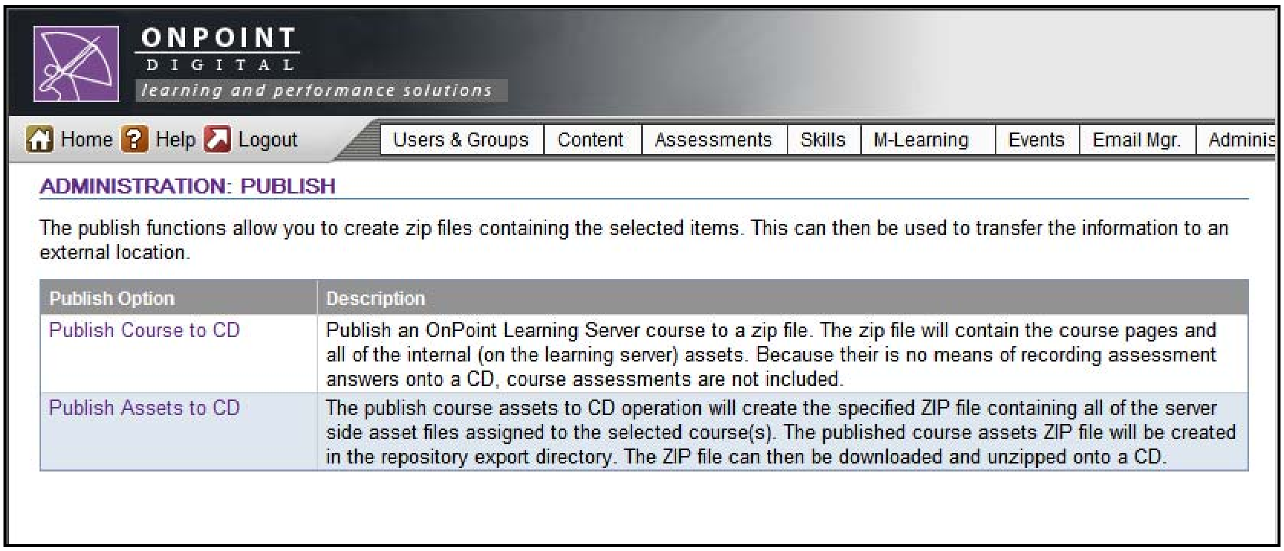


Figure 9-32 – Administration - Publish to CD Options

9.6.1 – Publish Course to CD

Selecting the Publish Course to CD submenu selection from the Administrative – Publish to CD Menu option displays the *Administration: Publish Course to CD* utility screen which allows Administrators to select any **Course** and generate an offline version of that course's content (See Figure 9-33 below). The available choices on this screen are:

1. Select a course from the dropdown list of active online courses, to publish to CD, create an offline version for placement on a server, or to create a mobile-optimized course for a handtop-class PC. **Note**: *The displayed list includes all **Courses** that are defined in the OnPoint Course repository whether those **Courses** are published and with regard to their course record status which can be set as "Active", "Inactive" or "Request Delete". Attempting to publish an inactive or incomplete Course to CD will certainly result in "less than perfect" results.*
2. Choose a name for your generated output files – packaged as a Windows ZIP file - either by using the selected Course Name or by specifying a unique name in the dialog box provided; the default naming convention for this function uses the existing Course Name and the extension

".ZIP" when generating the requested offline course and can be accomplished using the provided checkbox function default setting.

3. If you're looking to create a mobile version of your Course for delivery to a support handtop or UMPC-class mobile device, make sure you select the "Use Minimal Page Header" checkbox; this eliminates the banner and uses larger buttons/icons making the offline version of your Course easier to read and navigate.

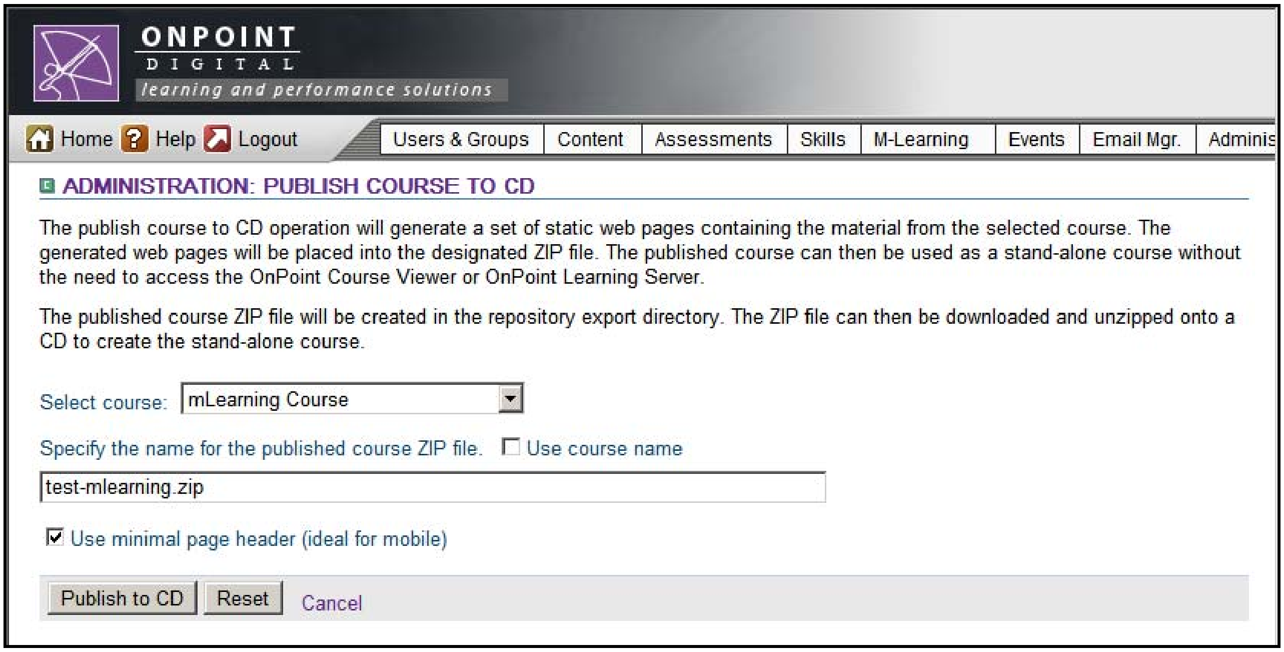


Figure 9-33 – Publish Course to CD Screen

4. Once you've selected a Course to output and provided a name for the ZIP package, choose from one of the following Action buttons:

Action Buttons	Description
Publish to CD	Click the Publish Course button to begin the process.
Reset	Click the Reset button to reset your current entries and begin your selection and naming process again.
Cancel	Click the **Cancel** link to cancel your current entries and begin your selection and publication process again.

5. Pressing the **Publish to CD** action button will initiate the process of generating your CD version of the specified **Course**. Course Manager will create the off-line version of your Course and build all of the necessary **Topics**, **Pages**, **Assets** and associated styles that were originally included in the online version of your **Course**. The system will even generate an off-line OPCV banner based on any custom branding you have defined for your customer slice.
6. Once you've published your offline course content, you are presented with a Download link that allows you to download your prepared ZIP package (See Figure 9-34 below).

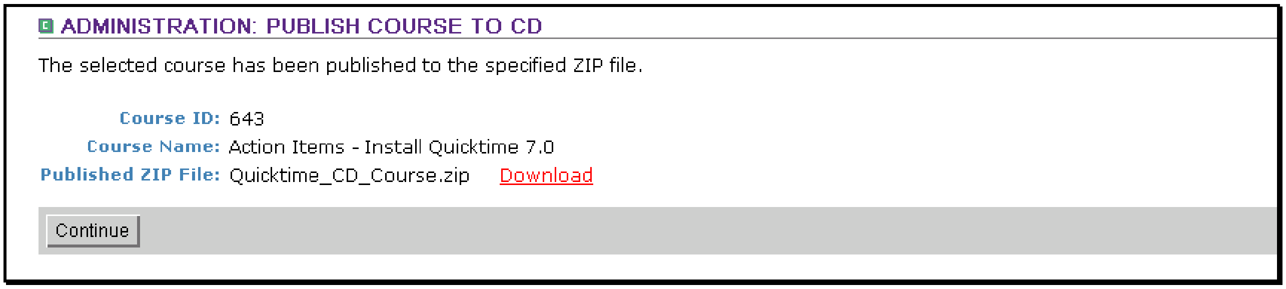


Figure 9-34 – Publish Course to CD Download Link

7. Click the Download link to begin the download process and supply a destination directory or folder for the ZIP package to be sent to as shown in Figure 9-35 below.

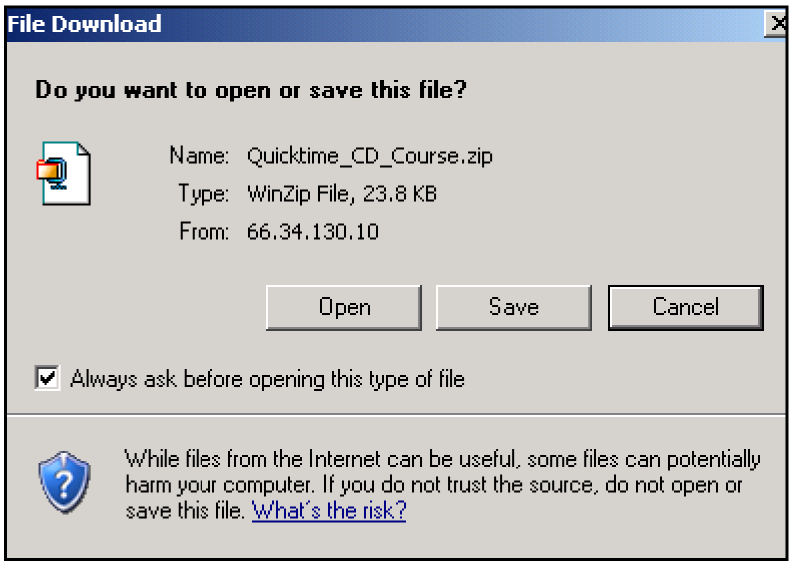


Figure 9-35 – Publish Course to CD Download & Save Dialog Box

8. Once you've downloaded the entire package, extract the contents of the ZIP package into a folder as shown in Figure 9-36 below.

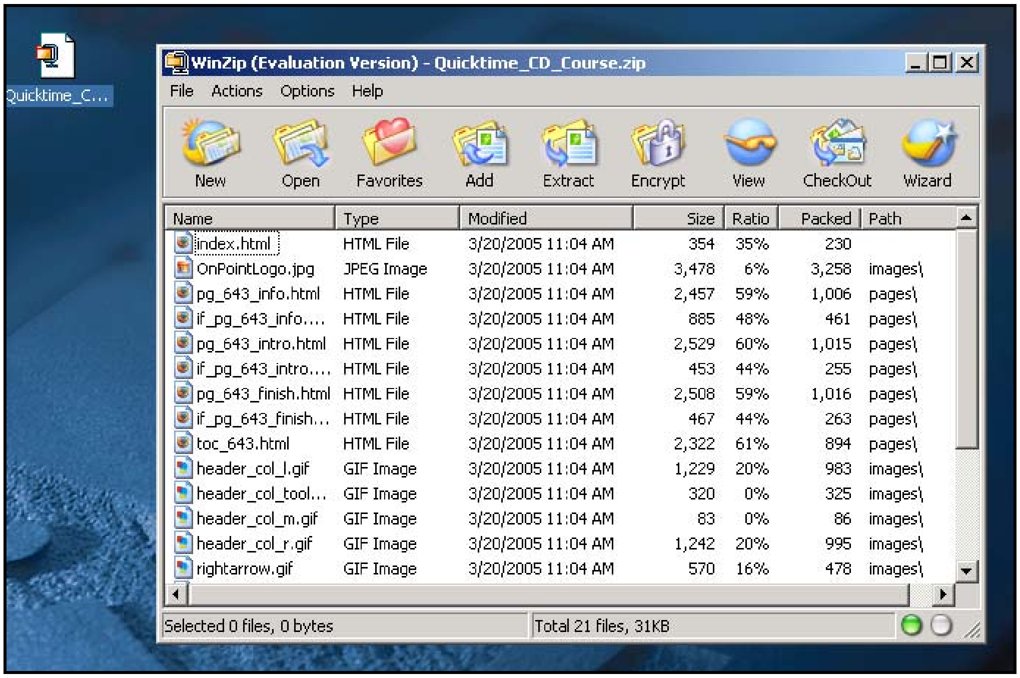


Figure 9-36 – Publish Course to CD Contents in ZIP Package

9. Once you've unzipped the ZIP package containing your offline **Course**, double-click the "INDEX.HTML" file to launch your new course as shown in Figure 9-37 below. Note the branding and structure of your original Course is now mimicked for offline users/learners.

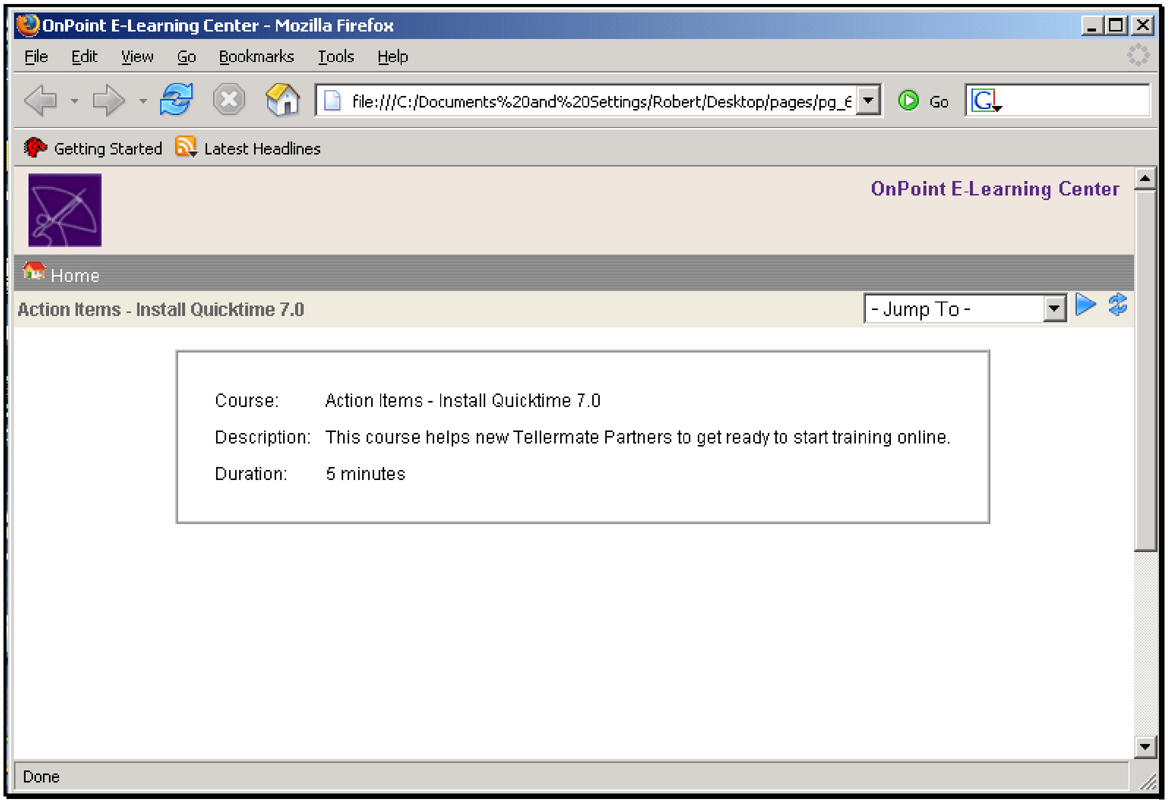


Figure 9-37 – Branded, Offline Version of Published Course

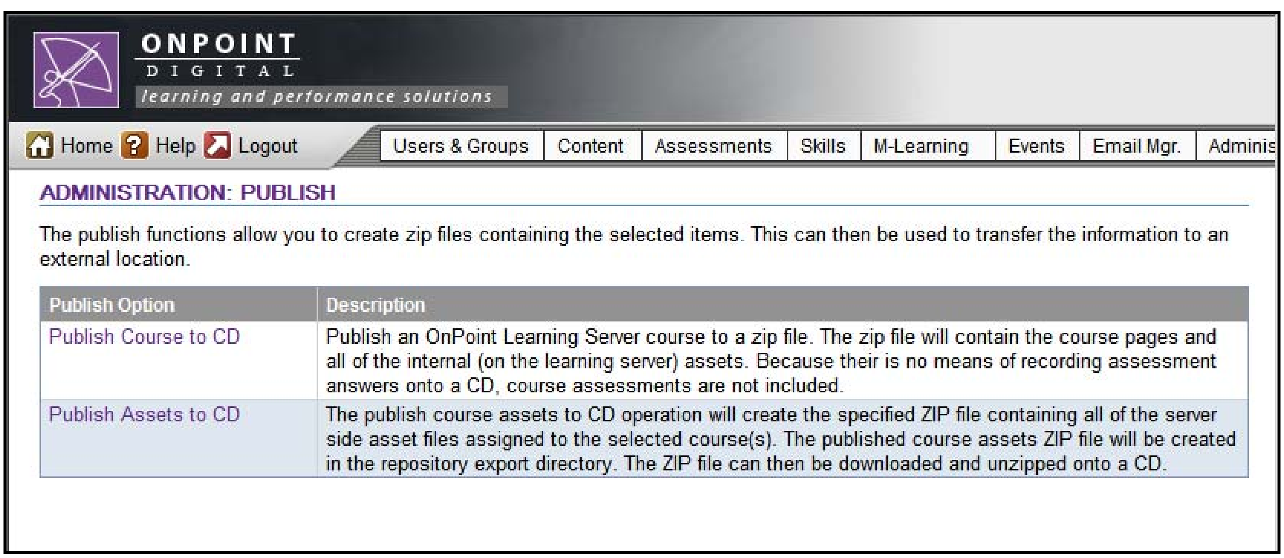


Figure 9-38 – Administration - Publish to CD Options

9.6.2 – Publish Assets to CD

Selecting the Publish Assets to CD option from the Administrative – Publish screen (as shown in Figure 9-38 above) displays the *Administration: Publish Assets to CD* utility screen which allows Administrators to select any Active course and generate an offline version of that Course's Assets only. (See Figure 9-39 below).

The difference between the Option B assets publication functionality described here and the Option A course publication functionality described above centers on the fact that Option B allows an administrator to still track and manage their Courses online but move any content, including larger rich media asset files like video, audio and Flash clips closer to the user so they don't need to be downloaded over the Internet while taking an online course. The available choices on this screen are:

1. Select a course or courses you'd like to generate a set of offline assets for from the table display of active online courses by clicking the associated checkbox for that **Course** or for the master CD you're looking to create. You can select **Assets** for many **Courses** as you'd like up to and including all the **Courses** found on your system.

   NOTE: *The displayed list includes all **Courses** that are defined in the OnPoint Course repository whether those **Courses** are published and with regard to their course record status which can be set as "Active", "Inactive" or "Request Delete". Attempting to publish a set of assets for an inactive or incomplete Course out to CD will certainly result in "less than perfect" results.*

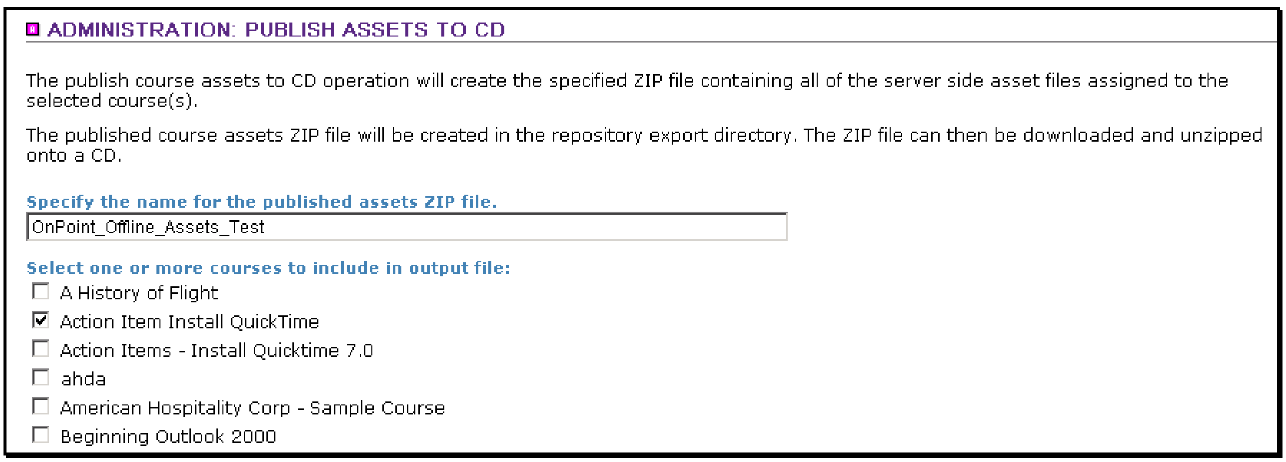


Figure 9-39 – Publish Assets to CD Screen

2. Specify a name for your generated **Asset** output files – to be packaged as a Windows ZIP file - either by using the selected Course Name or by specifying a unique name in the dialog box provided for your complete Asset Library. Once you've made your selections to output and provided a name for the ZIP package, choose from one of the following Action buttons:

Action Buttons	**Description**
Publish Assets to CD	Click the Publish Assets to CD button to begin the process.
Reset	Click the Reset button to cancel your current entries and begin your selection and naming process again.
Cancel	Click the **Cancel** link to cancel your current entries and begin your selection and publication process again.

3. Pressing the **Publish Assets to CD** action button will initiate the process of generating your CD version of the specified **Course**/Asset library. Course Manager will create off-line versions of all the Assets from all the Courses you specified your Course create a master file containing all of these files as well as any specified subdirectories or folders you specified when creating your **Asset** files.

   Note: *All Assets to be included on an off-line CD MUST use the "Link" Asset type. It is possible to update/convert existing Assets from internal or URL/external designations using a database query. Please contact OnPOint's Support Team to request assistance initiating this sort of update.*

4. Once you've published your offline course content, you are presented with a Download link that allows you to download your prepared ZIP package (See Figure 9-40 below).

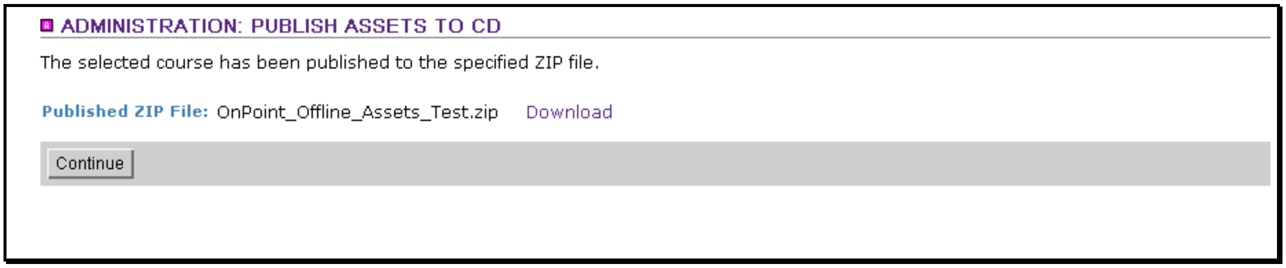


Figure 9-40 – Publish Assets to CD Download Link

5. Click the Download link to begin the download process and supply a destination directory or folder for the ZIP package to be sent to as shown in Figure 9-41 below.

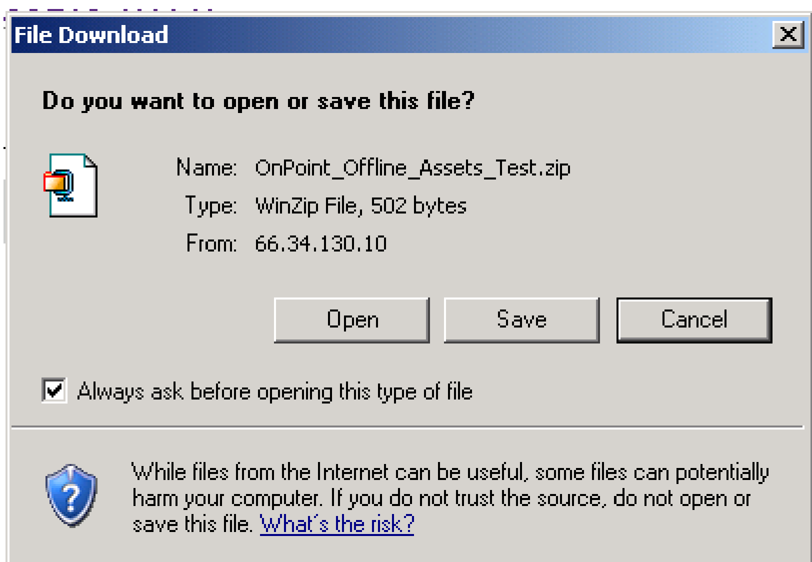


Figure 9-41 – Publish Assets to CD Download & Save Dialog Box

6. Once you've downloaded the entire package, extract the contents of the ZIP package into a folder as shown in Figure 9-42 below.

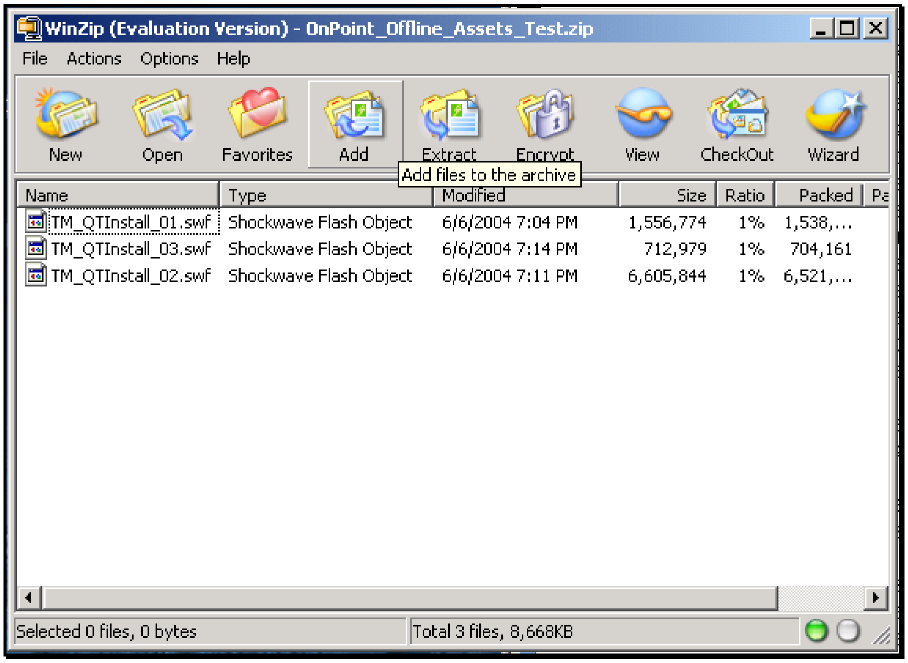


Figure 9-42 – Publish Assets to CD Contents in ZIP Package

7. Finally, administrators need to develop a procedure that will allow users to then load offline copies of the generated **Asset** files into their computers (via the CD/DVD-ROM disc), onto their computers (copying the files to their HDDs) or made accessible via an attached resource (local file server accessible via a UNC path). Once the content has been loaded to a local source, the user's Assets Location needs to be updated in Course Manager either by an administrator in OPCM by editing the user's record or by the user themselves via the Tools & Utilities tab that's accessible via the Content Viewer. For more information or support, please contact OnPoint's Support Team.

9.7 Administration: Licensing

This utility allows Root/Site Administrators to manage their OnPoint licenses including upgrading their total number of user/learner accounts and their total number of author/administrator accounts. All updates to an organization's licenses require a keyed and encrypted License File that's tied to your organization's primary license and the assigned IP address for your Course Manager application. All License Files are generated by OnPoint's Support Team after confirmation of an upgrade has been received by OnPoint's Sales Team.

Selecting the *Licensing* submenu selection from the Administrative Menu displays the *Administration: Licensing* update screen. From this screen, Site Administrators can review their current licensing information and also increase (or decrease) the total number of allowable User and Administrator accounts by providing the necessary encrypted License Code supplied by OnPoint's Support Team. Each encrypted License Code is unique to the server's published name and URL (web address) as well as other customer-specific parameters. License Codes can only be used once, are created to be time-sensitive, and will expire within 48-hours of their generation via OnPoint's License Code Server.

The Server License utility displays the following information for each OnPoint customer instance:

Element	Description
License Code:	Dialog box where you enter your supplied Server License code.

Once you've entered a supplied Server License code into the supplied Code field dialog box:

Action Buttons	Description
Update License	Click the Update License button to upgrade your user and/or administrator accounts.

Updating Your Assigned Licensing Parameters

When updating your server's License configuration, use the following procedures to increase the total number of User and/or Administrative accounts supported by your license (See Figure 9-43 below).

1. Open the email you received from OnPoint's Support Team. Highlight the included License Code with your cursor and hit "Ctrl + C" on your keyboard to copy the exact contents of your new License Code.
2. Switch to Course Manager and hit "Ctrl + V" on your keyboard to paste the copied License Code into the License Code field.
3. Click the Update License button. The change will be made immediately.

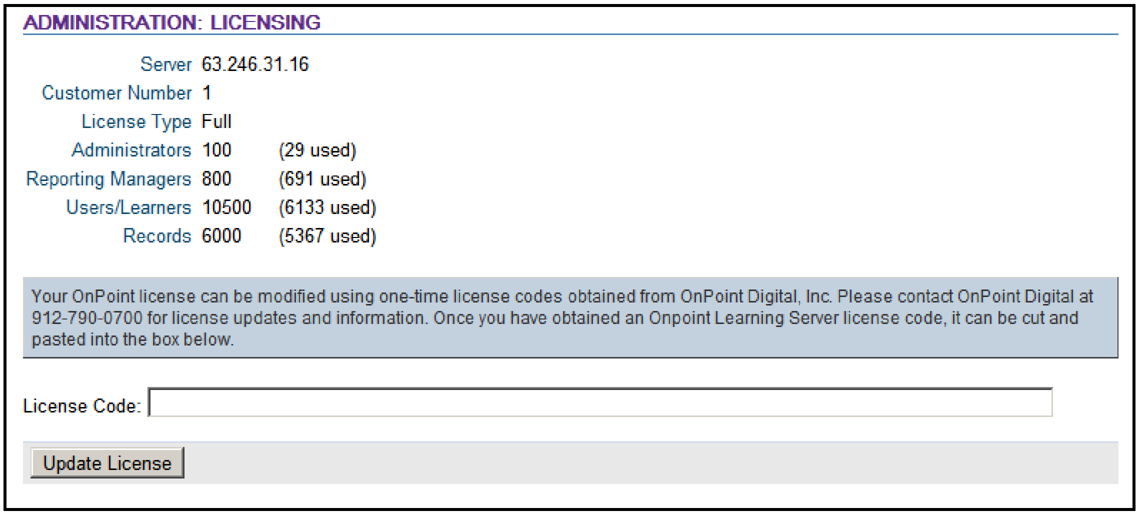


Figure 9-43 – License Update Utility

NOTE: *Do not attempt to use an expired License Code or a License Code generated for another OnPoint Licensee as attempting to apply this Code may damage your own licensing configuration and setup.*

9.8 Administration: Deletion Tasks

This submenu selection allows Content Administrators and Root/Site Administrators to review all pending requests for the deletion of shared organizational content and information that has previously been uploaded and maintained in Course Manager. A common object repository permits content creators and subject matter experts to share one copy of any system element including **Assets** (e.g., text, images, video clips), **Pages**, **Topics**, and complete **Courses** between different people and departments without additional storage or processing overhead. In short, each building block can be used countless times in different areas by simply referring to the original source instead of copying it over and over again.

The downside to an object-oriented design is manifest by the fact that one person may determine they no longer require a certain Asset or Page and decide to simply delete it, when in reality it was still a desired component of other Courses or content that a different author was using. We therefore employ the following delete protections.

Performing Deletion Tasks

To ensure that no content or database element is permanently deleted without proper approval, Level 3 Administrators -- including Content Coordinators and Event Managers -- (see Users & Groups: Managers for more information on assignable administration levels) cannot delete any **Asset**, **Page**, **Topic**, **Course**, **User**, **Group**, **Assessment** or **Event** records from the database directly; instead, Level 3 Administrators can only mark the status of those elements they deem no longer necessary as “Inactive” or “Request Delete” which automatically notifies Level 4 Content Administrators and Level 5 Site Administrators that these elements have been flagged for deletion. Site Administrators can also delete an entire **Course**, with all associated **Topics**, **Pages** and **Assets** using a single “Delete/undelete a course” function. (Please see Figure 9-44 below).

1. Once database elements have had their shared status changed from either “Active” or “Inactive” to “Request Delete”, an active link to that record and all others currently flagged to be deleted will appear on the Administration: Deletion Tasks summary screen. Click on any presented link shown in blue, with the quantity to be deleted expressed as an integer marked in red (e.g., **Page (61)**). See Figure 9-44 below.

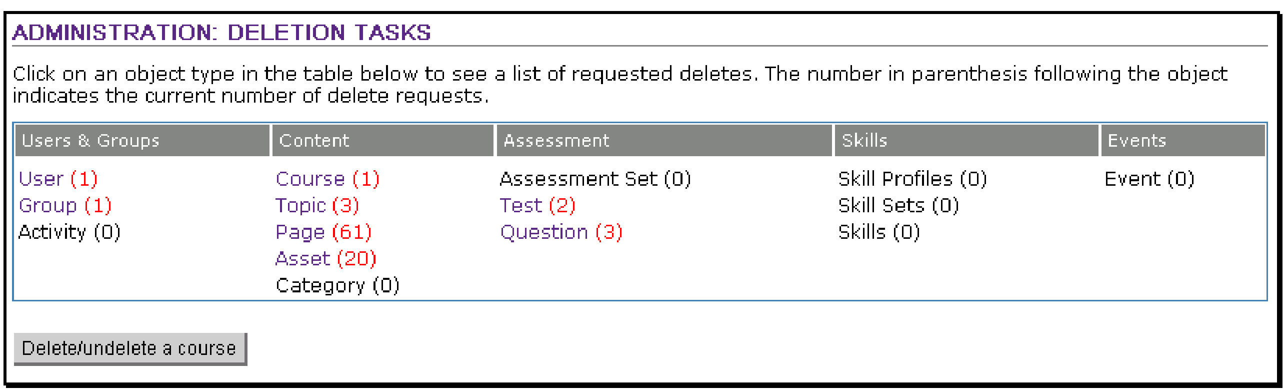


Figure 9-44 –Deletion Tasks Summary Screen

2. This link selection will launch the “Administration: Deletion List” screen. (See Figure 9-45 below). From this display, Level 4/5/6 administrators can review all of the database elements that have been flagged for deletion and also verify whether or not these elements are safe to delete before performing that function by clicking on the “Assignments” link in the far right table column. After confirming and accepting the deletion request(s), Administrators can then select

all of the records they wish to delete, either individually or by marking the "Select All" selection box, then hit the Delete button to complete the deletion task process for that database item or group of items.

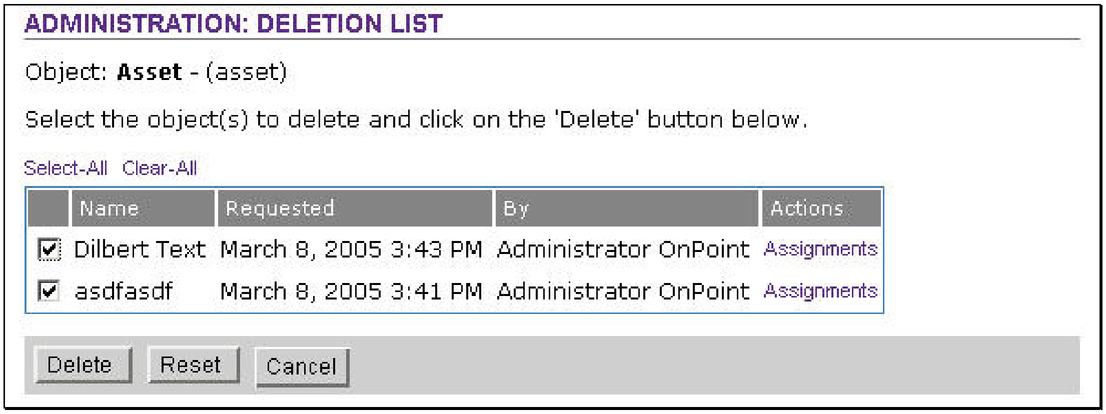


Figure 9-45 –Deletion List Selection/Confirmation Screen

3. In some cases, it is beneficial for Level 4/5/6 administrators to be able to automatically change the status of multiple records in different database tables from "Active" or "Inactive" to "Request Delete" for an entire **Course** using one single action (see Figure 9-46 below). This option saves time by obviating the need to select, open and edit the status of every **Topic**, **Page** and **Asset** using the **Content** submenu in the soon-to-be-deleted **Course**. Once all of the database elements have been marked for deletion, you simply perform the normal deletion tasks as described above in step #2 to verify deletion requests, review existing assignments, and complete the deletion tasks required.

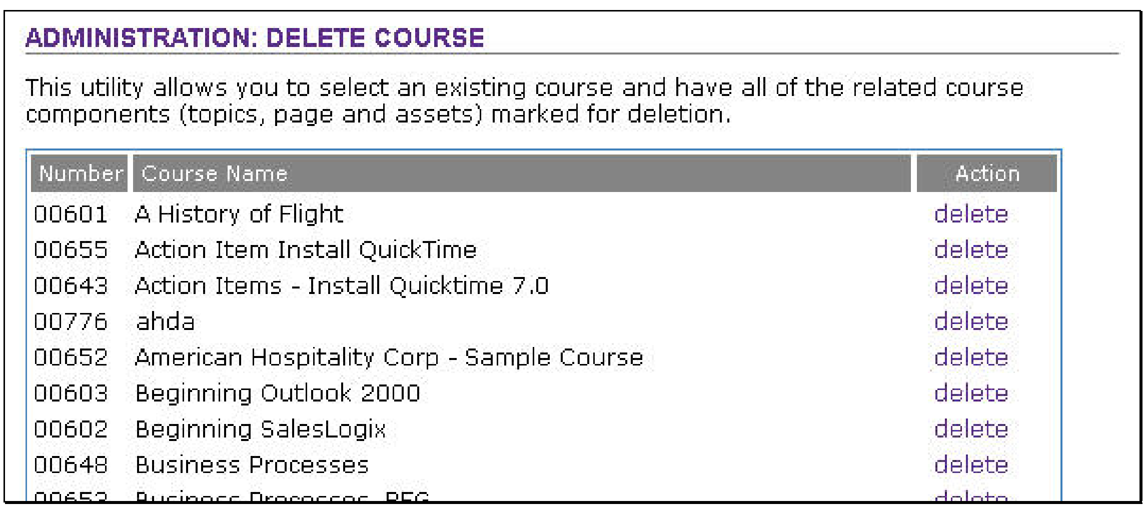


Figure 9-46 –Delete Course Selection Utility

NOTES: *The current status of any Course you wish to delete using this feature must be set to "Active" instead of "Inactive" or "Request Delete".*

It's important to remember that deleting an entire Course that has Topics, Pages or Assets that may be used elsewhere in another Course will result in that course becoming inoperable. Remember to check the Assignments link before completing any deletion tasks.

Once you've selected, verified and marked the elements you'd like to delete, choose one of the following Action buttons:

Action Buttons	Description
Delete	Click the Delete button to remove your selections from the shared OnPoint database.
Reset	Click the Reset button to erase your current changes and start editing again.
Cancel	Click the Cancel button to return to the Administration: Deletion Tasks screen. Your changes will not be saved.

9.9 Administration: Import/Export

This selection provides Content Administrators and Root/Site Administrators with a set of automated tools for importing existing course content or lists of users from other systems and also provides additional tools for exporting existing courseware from OnPoint's Course Manager for use in other standards-based systems. For clarity, this section of the documentation is divided into separate import and export utilities functions.

Import Utilities Options

Selecting the Import/Export selection from the Administrative Menu displays the "Administration: Import/Export" screen with direct links to several related system utilities that smooth out and speed up the import of existing content and organizational information. The display has two different sections; one listing Import Utilities and one listing Export Utilities (See Figure 9-47 below). From the Import Utility list, you can choose to:

1. *Import Users (into the Course Manager database in CSV format)*
2. *Import OnPoint Course (from an existing OnPoint course)*
3. *Import/Generate Course (from existing Assets added to Zip Package)*

ADMINISTRATION: IMPORT

The import functions allow you to transfer information from an external source into your Learning Server database.

Import Option	Source	Description
Import Users	CSV file (comma/quote)	Import users from a CSV (comma/quote) text file
Import OnPoint Course	Zip file (*.zip)	Import a course from a OnPoint course export file
Import Course	Zip file (*.zip)	Import a course from a zip file. Each file in the zip will be imported as a single page with a single asset. The pages may be assigned to an existing course or imported into a new course. All of the files must be imported from a single zip file.

Figure 9-47 – Import/Export Menu – Import Utilities

9.9.1 – Importing Users

Selecting "Import Users" from the Administrative: Import/Export Menu launches a User Import Wizard that uploads a list of names and related information from a pre-prepared spreadsheet template that is processed, auto-generates and assigns a set of new users to the OnPoint Learning Center. The normal process steps for importing users are as follows:

Step #1 - Download Import Template File. This selection assists in the import of existing Users from a structured list, either manually created or generated by another system (e.g. HR system or directory service). The file can be downloaded from the Import Users Utility screen (See Figure 9-48 below) by right-clicking the file link and saving the template to your local hard drive. The saved file is compatible with Microsoft's Excel application or other industry standard spreadsheet packages.

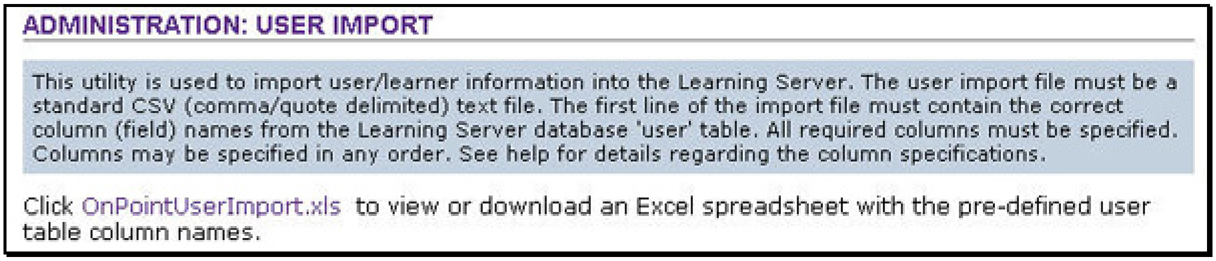
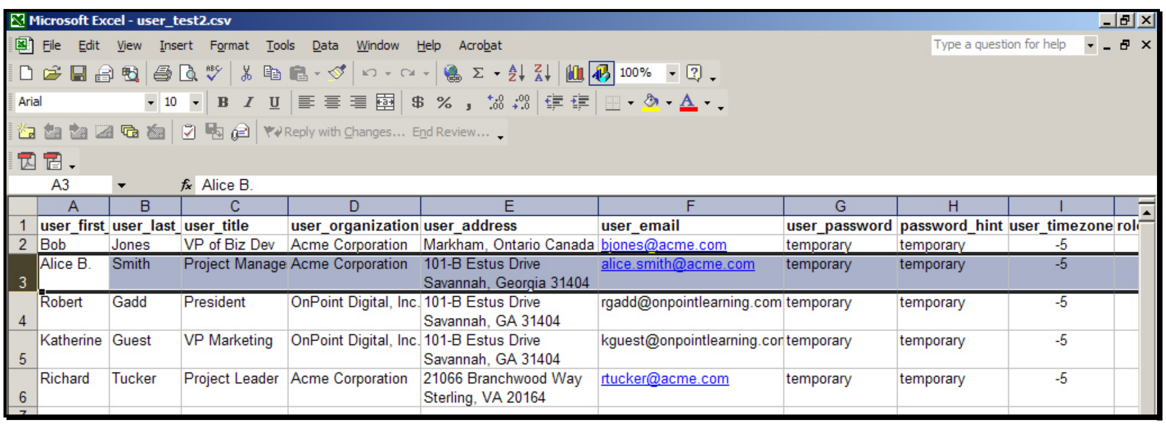


Figure 9-48 – User Import Utility – Downloading Template File

Step #2 - Prepare Import Template File. Open the Import Template File in your spreadsheet application (e.g., Microsoft Excel) and scan the column headings for your user-centric Import Template file. You can either populate the template file by completing the information in each column for each record you wish to add to the database (one per row) or you can simply assign the ***exact*** column headings from the Import Template File to the corresponding columns in another spreadsheet containing user information that's been generated by another system or database (e.g., a personnel/HR database, an enterprise directory service). As long as you have corresponding field values for each column of information in your spreadsheet named with the exact column heading from the Import Template File, you can use that source material as your template file and the information can actually be arranged in any column of that spreadsheet (see Figure 9-49 below).



	A	B	C	D	E	F	G	H	I
1	user_first_	user_last_	user_title	user_organization	user_address	user_email	user_password	password_hint	user_timezone
2	Bob	Jones	VP of Biz Dev	Acme Corporation	Markham, Ontario Canada	bjones@acme.com	temporary	temporary	-5
3	Alice B.	Smith	Project Manage	Acme Corporation	101-B Estus Drive Savannah, Georgia 31404	alice.smith@acme.com	temporary	temporary	-5
4	Robert	Gadd	President	OnPoint Digital, Inc.	101-B Estus Drive Savannah, GA 31404	rgadd@onpointlearning.com	temporary	temporary	-5
5	Katherine	Guest	VP Marketing	OnPoint Digital, Inc.	101-B Estus Drive Savannah, GA 31404	kguest@onpointlearning.cor	temporary	temporary	-5
6	Richard	Tucker	Project Leader	Acme Corporation	21066 Branchwood Way Sterling, VA 20164	rtucker@acme.com	temporary	temporary	-5

Figure 9-49 – User Import Utility – Import Template File with Column Headings

Step #3 - Import Users from Template File. Once the spreadsheet file has been compiled and every column/unique field has a corresponding field caption, upload the prepared file by selecting the template using the Browse button (See Figure 9-50 below).

Once the upload file has been selected, you can also specify a few other common inclusion parameters for the new Users/Learners you are about to import including assigning them to a particular Group or to a commonly taken Course. Click the Import Users button to complete the user import process.

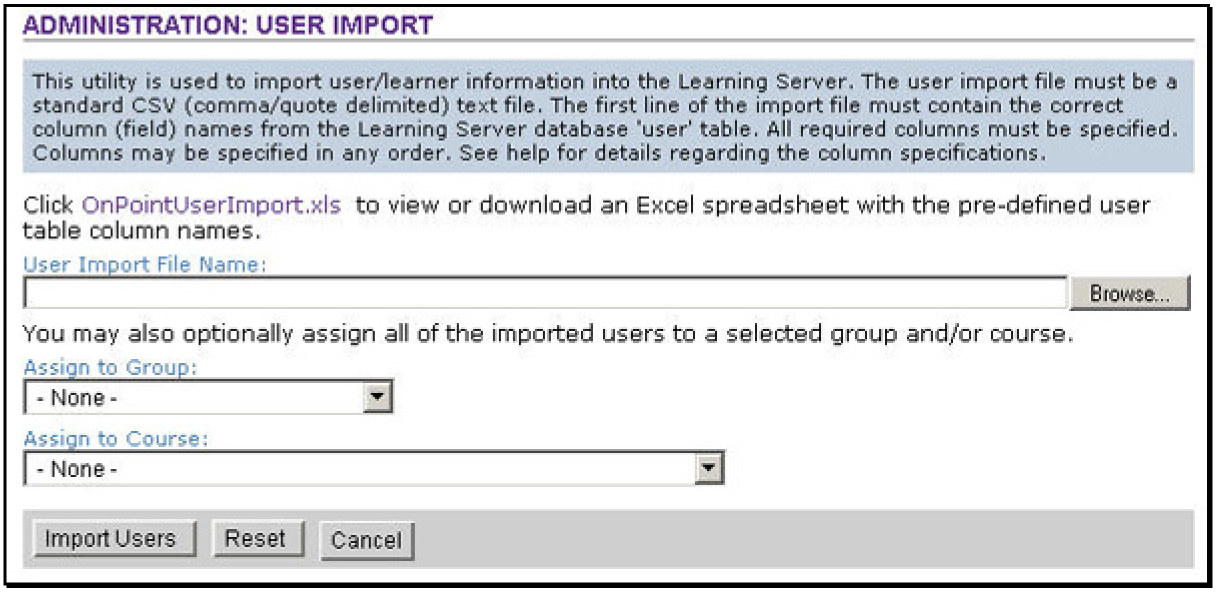


Figure 9-50 – User Import Utility – Importing Template File

9.9.2 – Importing an OnPoint Course

Selecting the "Import OnPoint Course" selection from the Administrative: Import/Export Menu launches a specialized utility that assists in the import of an existing ready-to-publish Course that was generated using OnPoint's Course Export function. This selection prompts the Administrator to upload a course saved in a ZIP file (see Figure 9-51 below). This functionality is useful when moving an entire course from one server instance to another (e.g., hosted customers transitioning to enterprise license customers).

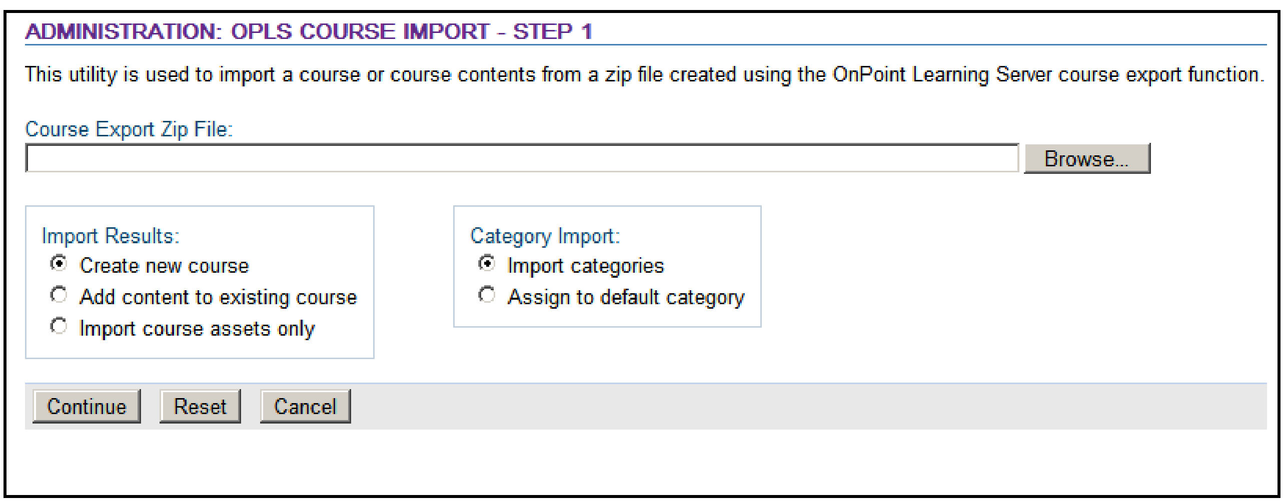


Figure 9-51 – Import Course Utility – General Screen

From the Course Import Utility list, you may:

- *Create a New Course* – To build a new Course that is just like to original in terms of structure and assignments.
- *Add Content to an Existing Course* – The add all of the new Topics, Pages and Assets to an existing Course on your current server, or
- *Import Course Assets Only* – This option allows administrators and content developers to extract the Assets from an old Course and add them to the LCMS only.

From the Course Import Utility list, you may also specify whether or not you'd like to import any related category assignments that might be associated with the original Course content by selecting:

- *Import Categories* – This is replicate any of the associated categories in the original Course manifest
- *Assign to a Default Category* – This option adds all of the newly imported/created Topics, Pages and Assets to one default Category. **Note**: This is a selector so make sure the master category you wish to use already exists.

Import OnPoint Course – Common Process Steps

While the commonly followed process steps for each of these Import OnPoint Course functions are all very similar, there are some variations in how each of these utilities function in practice. Elements common to each are as follow:

Element	Description
Course Export Zip	The name of the actual Exported Course's ZIP package processed during this Course Import process step. Qualifying ZIP packages must have been generated using OnPoint's Course Export function (below).
Import Results	There are three radio button options available when importing an Exported Course: ▪ Create a New Course – retains the same characteristics of the Exported Course. ▪ Add Contents to Existing Course – imports entire contents of the Exported Course's structure to an existing Course. ▪ Import Assets Only – imports all of the defined Assets found in the Exported Course for reuse in a new Course.

Action buttons that are common include:

Action Buttons	Description
Browse	Used to located and select the ZIP Package for the Exported Course you wish to import into Course Manager.
Continue	Once you've located and selected the Exported Course you wish to import, this button allows you to continue to Step #2 of the import process.
Reset	Click the Reset button to erase your current changes and start editing again.
Cancel	Click the Cancel button to return to the Administration: Import/Export screen. Your changes will not be saved.

In general, the expected process flow for each utility option would include:

Option A -- Create a New Course

This selection assists in the import of an existing Course generated using OnPoint's Course Export function. This selection prompts the Administrator to upload an entire OnPoint Course saved in a ZIP package and follows these process steps:

Step # 1 - Browse for the ZIP package previously generated using Course Manager and select that file. Press Continue to start the upload process (see Figure 9-52 below).

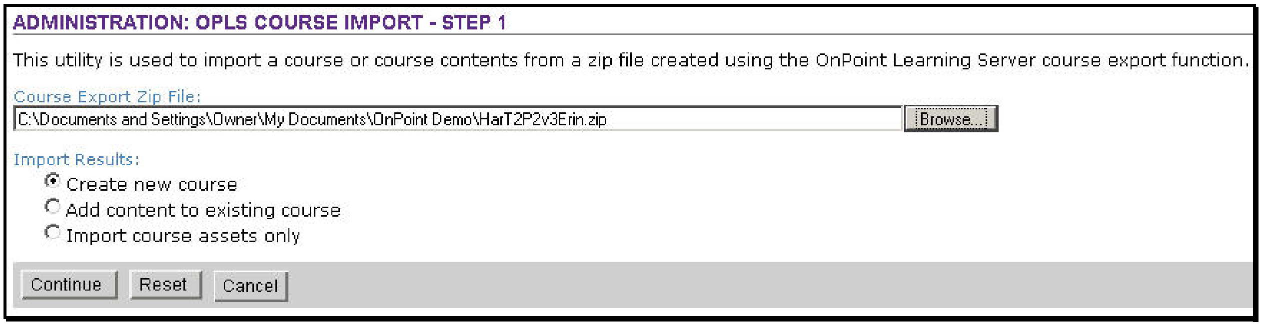


Figure 9-52 – Import OnPoint Course Utility – Step #1

Step # 2 – The name of the ZIP package appears in the "Import File" field and confirms your selection to "Create new course"; click the Begin Import button to begin importing the Course to your server. This process will create the Course and all previously supplied Course Information as well as generate all of the Topics, Pages, Assets, Categories and Assessment information that was specified in the Exported Course. If you wish to cancel this process, click the Reset button to return to Step #1 or the Cancel button to abort the import utility (see Figure 9-53 below).

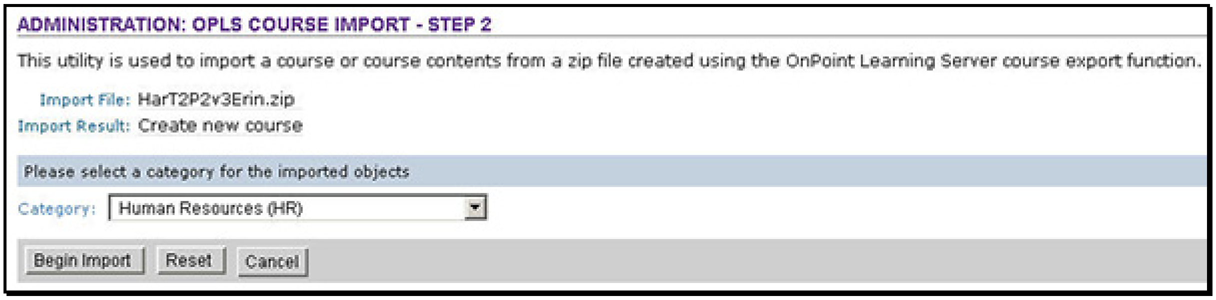


Figure 9-53 – Import OnPoint Course Utility – Step #2

Step # 3 – Once the import utility has made all of the necessary additions you requested, an Administration: Course Import – Results page will display confirming your selected Course has been imported successfully. Press Continue to conclude the Course import process (see Figure 9-54 below).

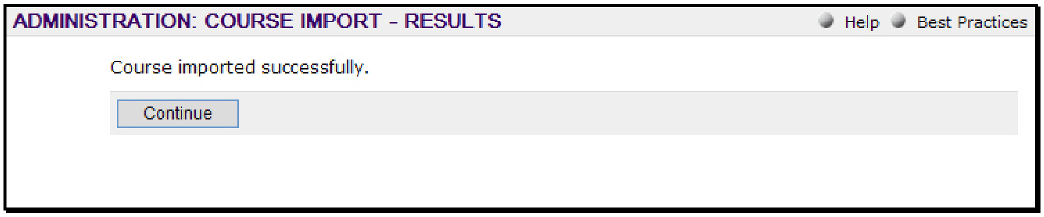


Figure 9-54 – Import OnPoint Course Utility – Step #3

Tip: *When is this feature useful? From time to time, OnPoint creates and publishes full online courses that provide support for learning and using applications like Course Manager and OnPoint's Ecommerce Package ("OPEC"). These courses can be exported from OnPoint's hosted servers and then downloaded by enterprise customers seeking to load these courses on their own in-house server installations. Alternatively, OnPoint's Support Team may request that a customer export one of their prepared Courses and FTP it to our offices for review and analysis.*

Option B -- Add Content to an Existing Course

This selection launches a specialized Content Import Wizard that operates with the same steps as the preceding full OnPoint Course import process with the exception of the fact that you can add the generated course materials to an existing Course thus importing all of the Topics, Pages, Assets, Assessments and Category information but not replacing the Course Information for the new Course.

Option C -- Import Course Assets Only

This selection launches a specialized Content Import Wizard that processes existing Asset files (e.g., images, animation files, video clips) pulled from a previously generated and exported OnPoint Course. This process creates a series of Assets that can be used or assigned to any existing or new Category.

Step # 1 - Browse for the ZIP package previously generated using Course Manager and select that file. Press Continue to start the upload process (see Figure 9-55 below).

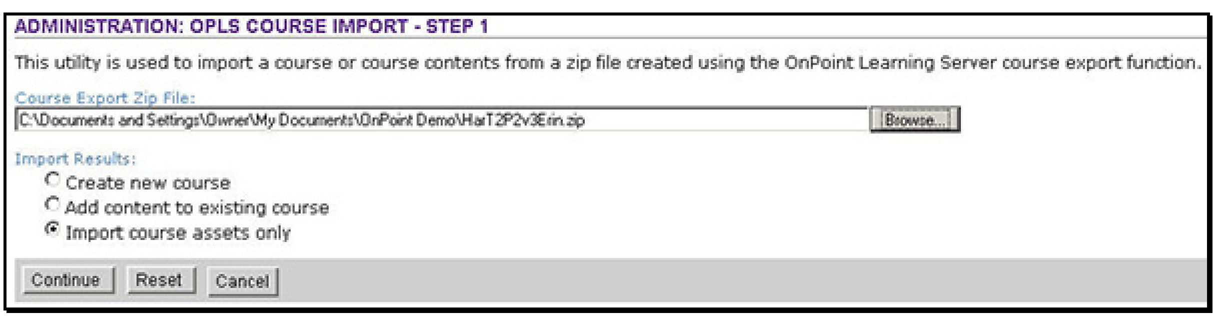


Figure 9-55 – Import Course Assets Utility – Step #1

Step # 2 – The name of the ZIP package appears in the "Import File" field and confirms your selection to "Import Course Assets Only". You may import all of the waiting Assets to an existing Category, a new Category or as "unassigned" to any Category. Click the Begin Import button to initiate importing the Course Assets to your server. This process will create the necessary Asset records complete with all descriptive information, assigned Asset Types and specified sizing. If you wish to cancel this process, click the Reset to return to Step #1 or Cancel to abort the import utility (see Figure 9-56 below).

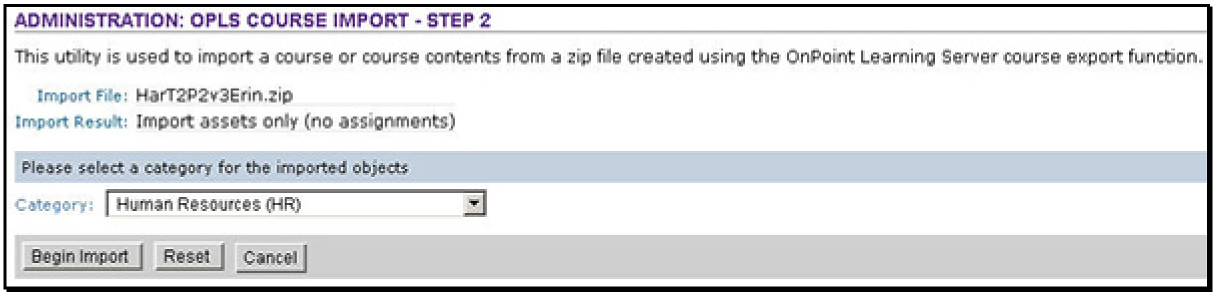


Figure 9-56 – Import Course Assets Utility – Step #2

Step 3 – Once the Asset import utility has made all of the necessary additions you requested, an Administration: Course Import – Results page will display confirming your selected Course has been imported successfully. Press Continue to conclude the Course import process (see Figure 9-57 below).

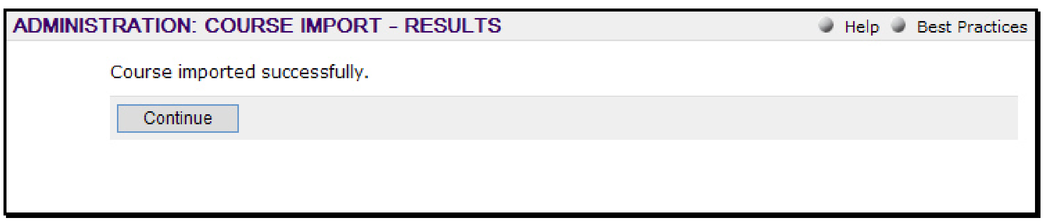


Figure 9-57 – Import Course Assets Utility – Step #3

9.9.3 – Import Course Materials (for OnPoint-Managed Courses)

Selecting the "Import Course" selection from the Administrative: Import/Export Menu launches a simple Course Builder Wizard that uploads a collection of pre-prepared files saved in any OnPoint-supported *Asset Type* (image, video, Flash, PDF, etc.). This function saves each uploaded file as an **Asset** in the OnPoint database, creates a **Page** for that **Asset**, includes that **Page** in a new or existing **Topic**, and assigns that **Topic**(s) to a new or existing **Course**. This process facilitates rapid course building though there are some limitations to the process (as explained below) and some preparation that needs to happen prior to performing this import process. The normal process steps for importing course materials are as follows:

Pre-Flight: Asset Zip File (performed offline). The first step in this process involves the collection of the various source materials that will become distinct and managed **Asset** files in the OnPoint repository. The source of these files is normally the output of other third party applications and tools including text files (Microsoft Word HTM files), image files (e.g., JPEGs, GIFs), video clips (e.g., QuickTime .MOVs, Windows Media Player .WMVs, standard AVIs), Flash/Shockwave files (e.g., .SWFs), and Adobe Acrobat files (e.g., .PDFs). When imported using this utility, these newly created **Asset** files will be associated with a newly created **Page** – ***with only one Asset per page*** – and will also be associated with a new or existing **Topic** and assigned to a new or existing **Course** (See Figure 9-58 below). Once all of your files have been gathered and renamed/numbered, compress the files into a ZIP package and give it a unique name.

NOTE: *To simplify the import process, we recommend that you rename and number the original source files so they have unique and recognizable file names and so they also are organized in some logical order.* ***While the system will automatically rename uploaded files with spaces in the name to include underscores between words, it's wise to name your files with shorter names without spaces*** *(see examples below).*

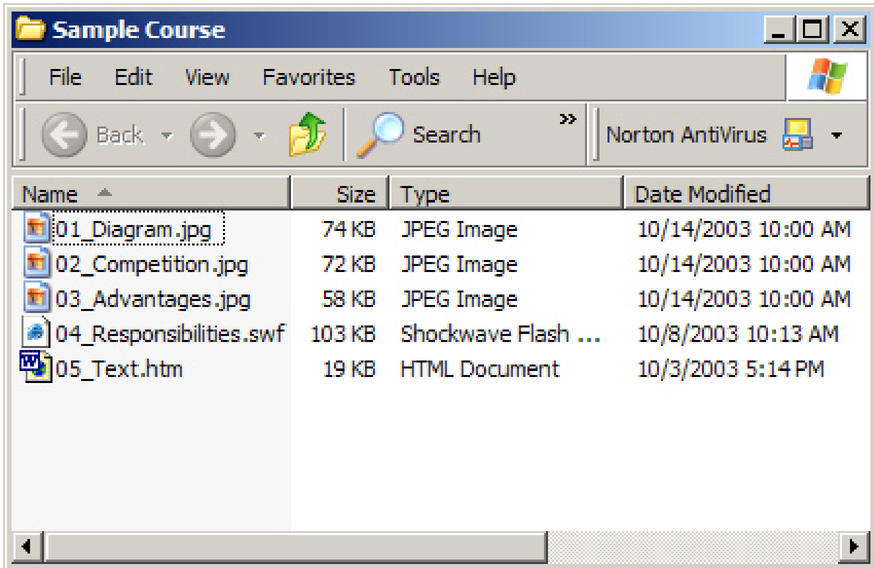


Figure 9-58 – Import Course Materials Utility – Gather New Asset Source Files

Step #1 – Upload Zip File. After the ZIP file has been generated containing all of the files you'd like to use to build your Course, you can upload that prepared ZIP file by selecting it using the Browse button (See Figure 9-59 below). You can also specify a subdirectory on the server where your uploaded files can be stored **but we only recommend doing this** when you're using this import routine to upload complex MFA-type assets – otherwise, not specifying a subdirectory may make it easier to support/update your assets in the future if necessary. Once selected, press the Continue button to go to the next step.

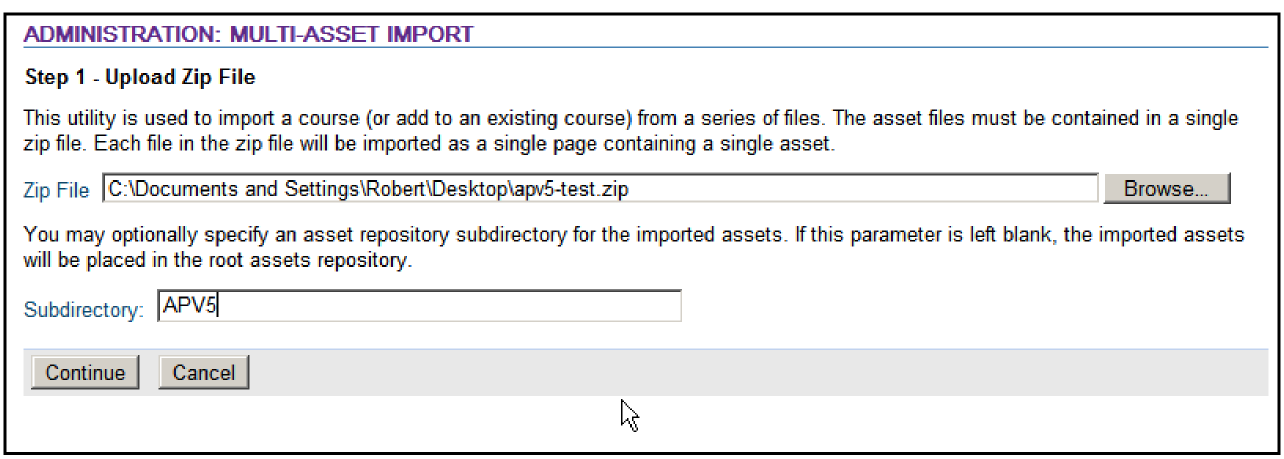


Figure 9-59 – Import Course Materials Utility – Select/Upload Zip File

Step #2 – Select/Create Course. Once you've selected the ZIP file to use, the system begins the process of uploading and analyzing the contents of the uploaded ZIP package and then permits you to either add these new files to an existing course or to create a new one (See Figure 9-60 below).

a. To create a new **Course**, supply a new **Course** name and a new **Topic** name. Then assign a **Category** from the dropdown list.
b. If you'd like to add the new course materials to an existing **Course**, select it from the list of previously defined **Courses** (viewed by their **Category** assignments) by pressing that radio button. If you're adding these new files to an existing **Course**, Step #4 will provide you with a list of existing **Topics** already defined for your selected **Course**.
c. Press the Continue button to move to Step #3.

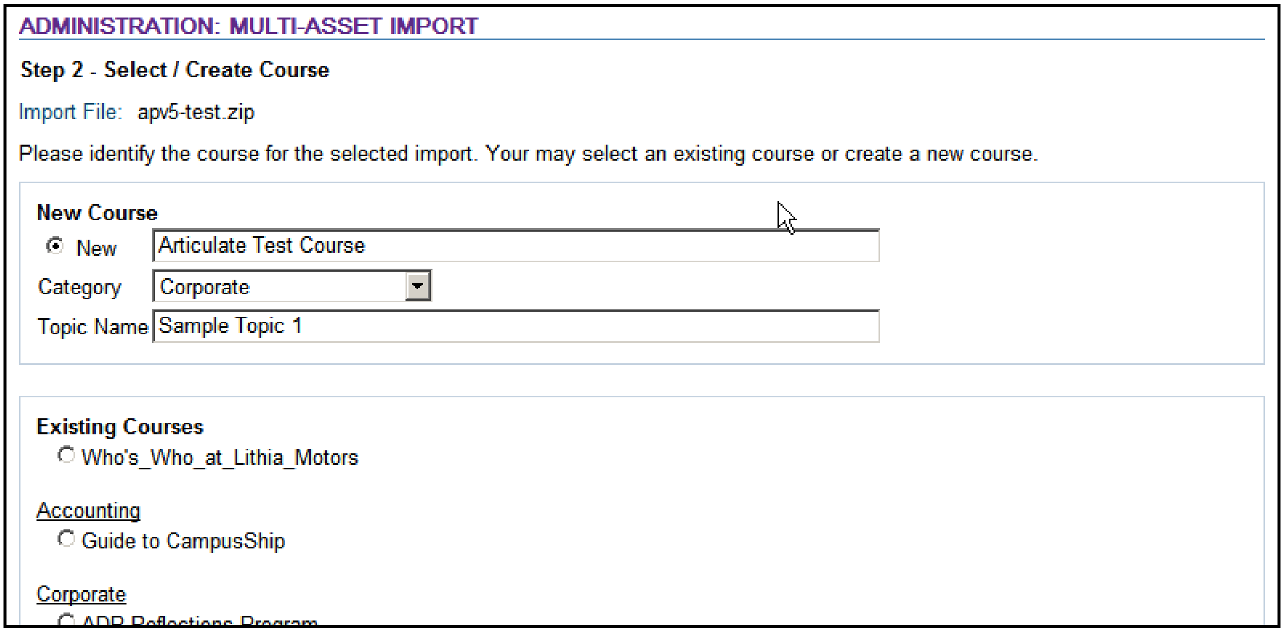


Figure 9-60 – Import Course Materials Utility – Select/Create Course

2. *Step #3 – Define Pages*. Once you've named a new **Course** or selected an existing one from the **Course** list, the import utility permits you to define a template for your **Course**'s **Page** layouts. You can specify Asset Sizes, Asset Placements and Page Layouts for files imported and corresponding Pages generated (See Figure 9-61 below).
   a. First, choose a default Asset Size for the new files being imported. You can select from any of the standard "t-shirt" sizes or specify a specific size by selecting "Custom" from the dropdown list and entering the exact size to use.
   b. Next, choose a default background from the list of existing *Page Layouts/CSS documents* defined for your server instance/customer slice. Your selection will be applied to every new **Page** created.
   c. Determine the Asset placement you'd like to use for every new **Page** created by making your selection from the dropdown box. The best option here is probably "center" unless you plan to add additional **Assets** to your new **Pages** following this import process.
   d. Next, assign the new **Page** you're generating to a **Topic**.
      i. If you're creating a new **Course**, you can only use the default **Topic** name you provided in Step #2 above.

    ii. If you're adding your new **Pages** to an existing **Course**, you can assign your new **Pages** to any of the previously defined Topics already associated with that **Course**.

e. Confirm that the file being imported has the correct *Asset Type* associated with it. The correct type should have been interpreted by the system based on its file name extension (e.g., JPG = image, MOV = video).
f. You may alter the *Asset Size* for any given **Page** to not use your selected default value by changing to another one of the standard "t-shirt" *Asset Sizes* from the dropdown box.
g. Next, you can specify a different *Page Name* to be displayed when saving the new **Page** in the Course Manager repository. For example, you may wish to remove the numbering system you used to smooth the import process that ensured the new **Pages** were imported in a specified order.
h. Finally, you can specify a different *Page Title* to be displayed to users when taking a course. Unlike the Page Name designation mentioned in item g above, Page Titles are not used by the system and in many cases, you may wish to not have any Page Titles displayed to a user/learner when they are taking a Course because that information may already appear in the content itself. Also, not including a Page Title on your displayed course page yields back about 40-60 pixels of screen real estate in the Content Viewer so that's a consideration as well for some customers. Click the **Clear** link to automatically remove all the automatic Page Titles the import process generates.
i. When satisfied with all the import parameters for defining your new Pages, click the Continue button to complete the Import Course Materials process.

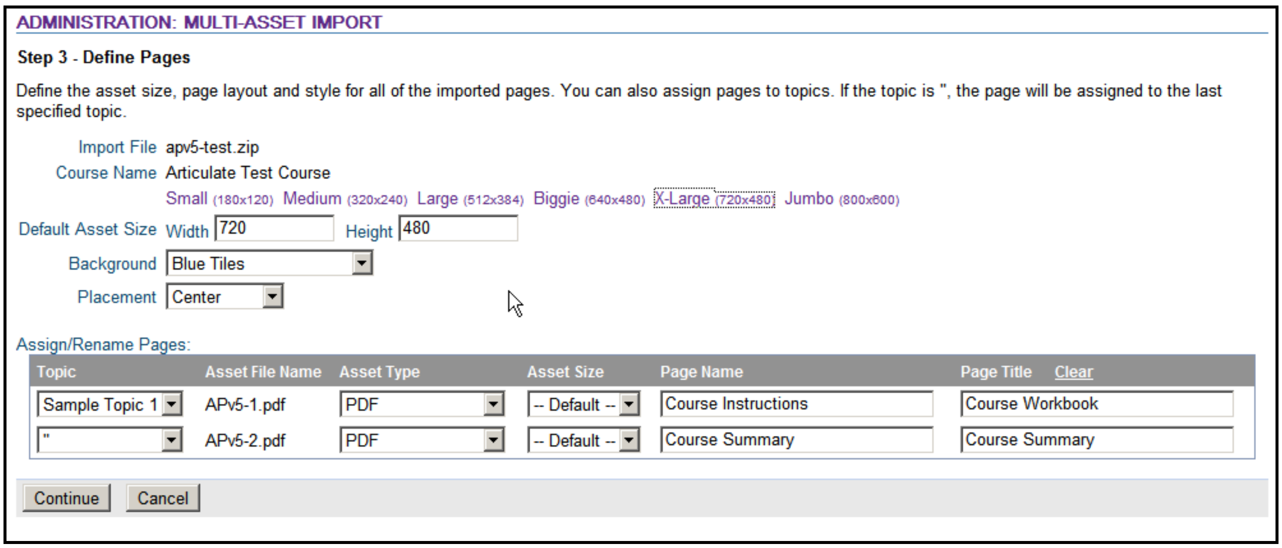


Figure 9-61 – Import Course Materials Utility – Define Pages

Post-Flight: Finish Up Your New Course. Once you've completed the import process above, there are a few tasks to perform to ensure your new **Course** is ready for use. In short, you should confirm that the imported files properly generated the required **Assets**, **Pages** and **Topics** you specified, and update the sequence and assignment of these elements if necessary. You can add an optional assessment, and you'll need to assign a set of Users and/or Groups who can access the course. Finally, you'll need to add the rest of the required fields on the *Course Information* screen and update the "Published to Course Catalog" field to "Yes" to activate the course.

9.9.4 – Export Utility Overview

The bottom half of the Import/Export Utilities Menu provides Access to Course Manager's export utilities. From the Export Utility list, you can choose to:

- *OPLS Course Export*
- *CSV Export*
- *Assessment Answer Export*
- *SCORM Export*

9.9.5 – Export an OnPoint Course

This selection allows Root/Site Administrators to export an existing OnPoint-managed Course as a series of XML files and Assets (these files are include SCORM-compatible manifest files). All of the generated output will be stored as a ZIP package with an administrator-supplied name. Once generated, the ZIP package will be ready for download to a directory or server by accessing the File Download Utility also located under this Administration menu. The general process steps are as follows:

Step #1 – After clicking the Export OnPoint Course link, review the listing of current Courses on your server and click the Course Name link for the Course you'd like to export (see Figure 9-62 below). Select the Course to export by clicking the corresponding radio button for that course and enter the name for your exported ZIP package if different than the current Course name. NOTE: If you do specify your own Course Export name, don't use spaces in the name you choose. See the example below to see the proper naming convention. Once you're satisfied with the output name, click the Export Course button to generate the Course output. If you wish to cancel this process, click the Reset to return to Step #1 or Cancel to abort the export utility.

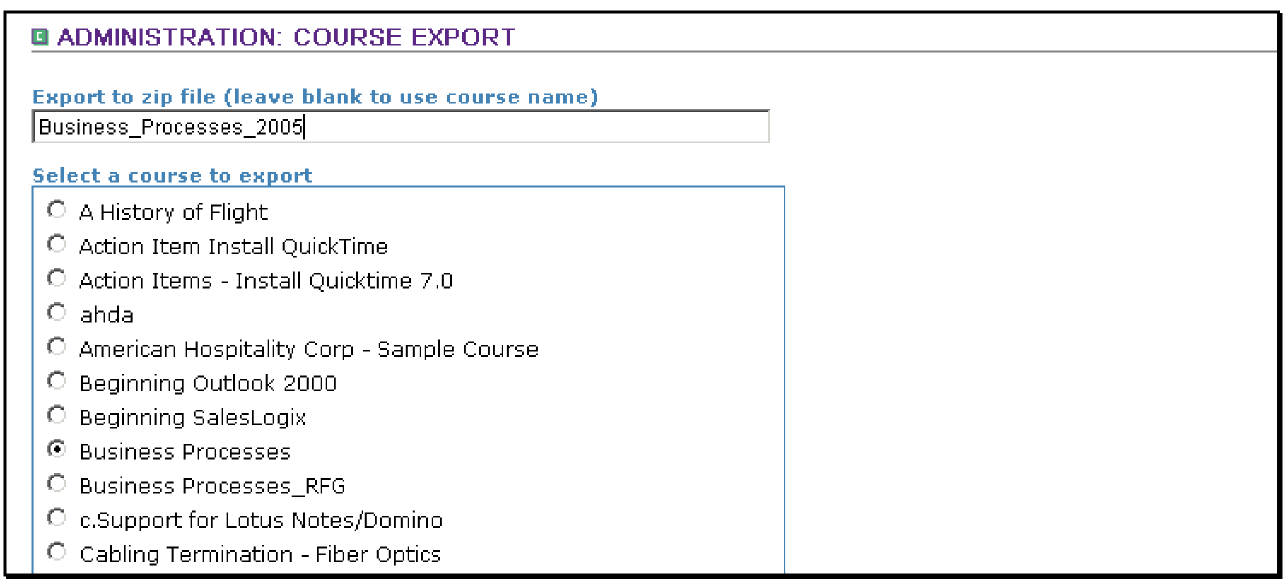


Figure 9-62 –OPLS Course Utility – Step #1

Step #2 – Once the export utility has generated your requested ZIP package, you need to access the File Download submenu, an Administration menu selection, and access the /export/

subdirectory. Locate your ZIP package and click the file to begin downloading the file to another destination directory (if needed). Follow the onscreen instructions to rename your ZIP package if necessary (see Figures 9-63 and 9-64 below).

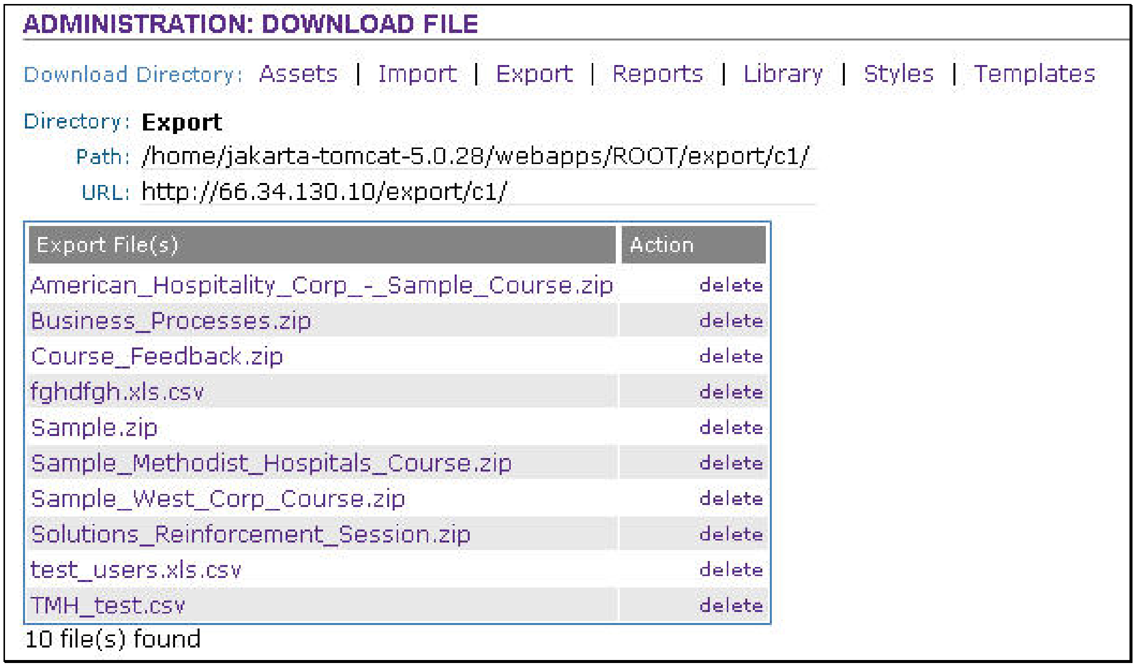


Figure 9-63 – Export OnPoint Course Utility – Step #2

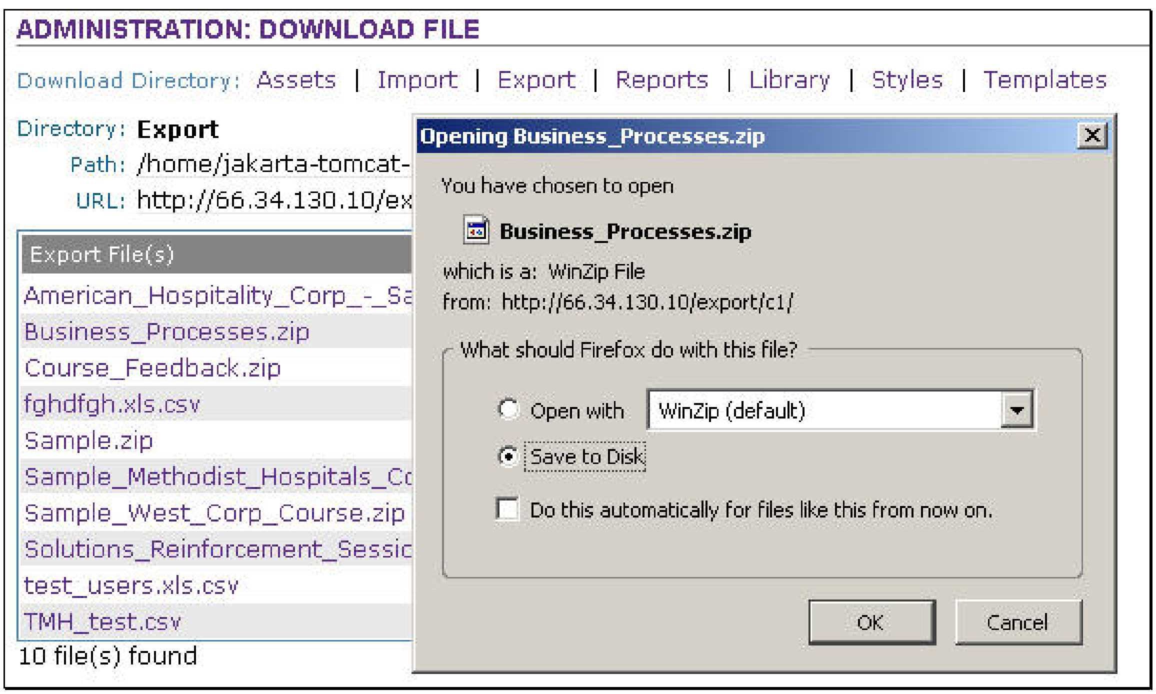


Figure 9-64 – Export OnPoint Course Utility – Step #2B

9.9.6 – Export CSV Table

This selection allows Site Administrators to create ad hoc reports by selecting and downloading information from one of the standard OnPoint database tables. Administrators select a table from a list of available tables, then can specify which fields within that table they'd like to include in their ad hoc report and the order they'd like to see their field selections appear. Once the basic parameters have been defined, the report is generated as a *.CSV (comma separated value) report and can then be downloaded to a workstation and opened using any industry standard database or spreadsheet application. The following process steps typify the selection and generation of an ad hoc report:

Step #1 – CSV Table Export (see Figure 9-65 below). Select the table you'd like to export from the table schema drop down menu.

Figure 9-65 – Export CSV Table Utility – Step #1

Step #2 – Select the fields/columns you'd like to include in your report (see Figure 9-66 below).

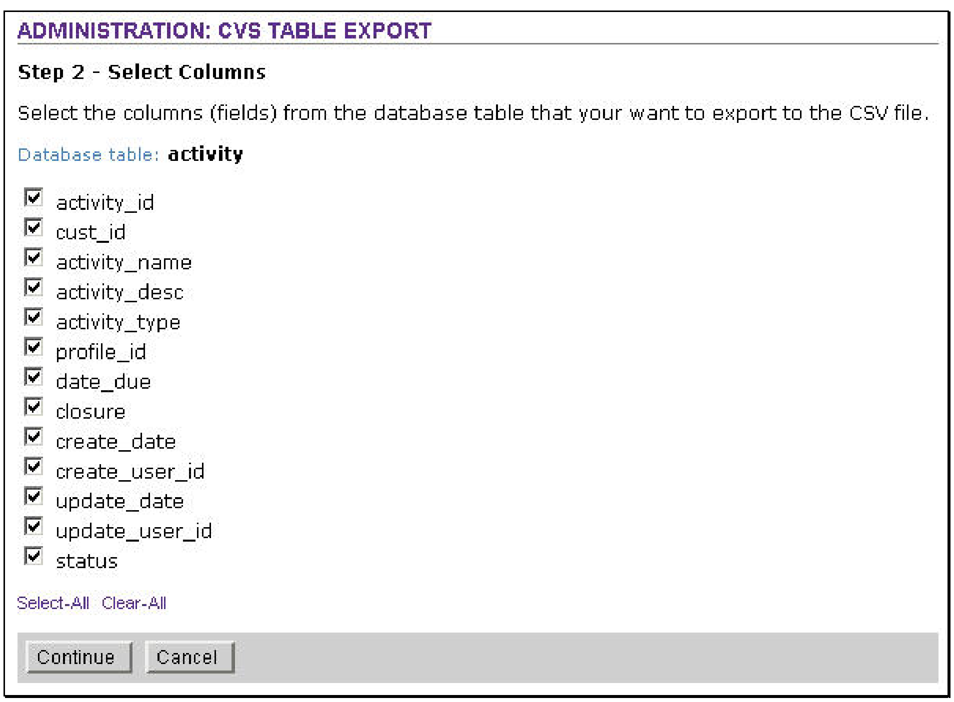


Figure 9-66 –Export CSV Table Utility – Step #2

Step #3 – Specify the name of the output file you plan to generate (see Figure 9-67 below).

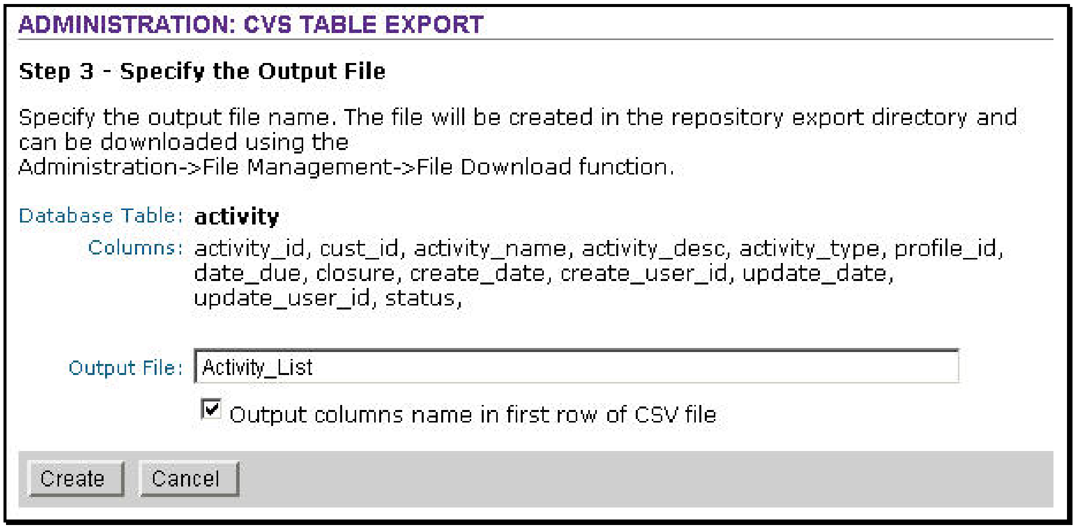


Figure 9-67 –Export CSV Table Utility – Step #3

Step #4 – Select and download the output file you generated from the Administration: File Upload/Download submenu using the Export directory (see Figure 9-68 below).

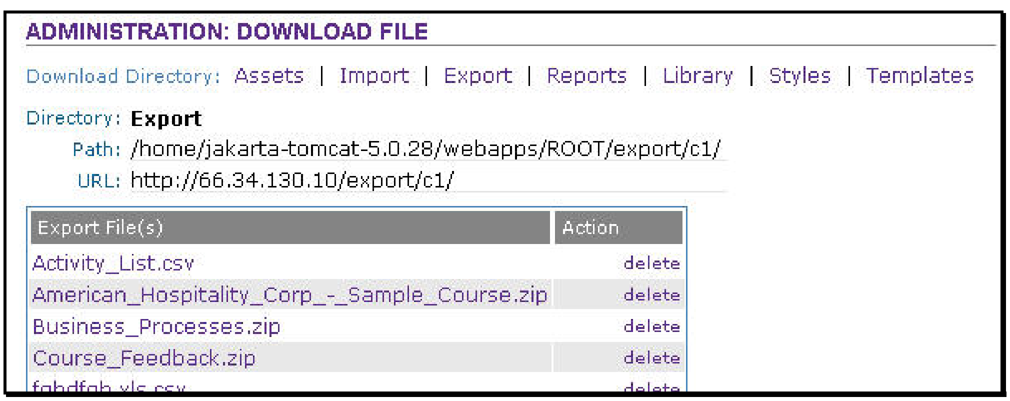


Figure 9-68 – Export CSV Table Utility – Step #4

9.9.7 – Export Assessment Answers

This selection allows Site Administrators to create ad hoc reports (in CSV format) containing all of the specific answers and responses provided by Users/Learners for any completed OnPoint Assessment. This feature is very useful and powerful for analyzing response trends, and it can also be used to compile detailed reports and analyses in spreadsheet format for reviewing things like performance results, inventory analysis, and other data collection exercises your organization may wish to automate. To create one of these reports, use the following steps:

Step #1 – Select the "Assessment Answer Export" option from the Export Options selection list. The screen will then update to show a complete list of Assessments (in alphabetical order) with each entry preceded by a radio button (see Figure 9-69 below). Your export will use the name of the Assessment Set you select unless you specify a name in the blank field. Click the checkbox if you'd like to include the Custom1 field (in this case referring to "Location Code") in your export.

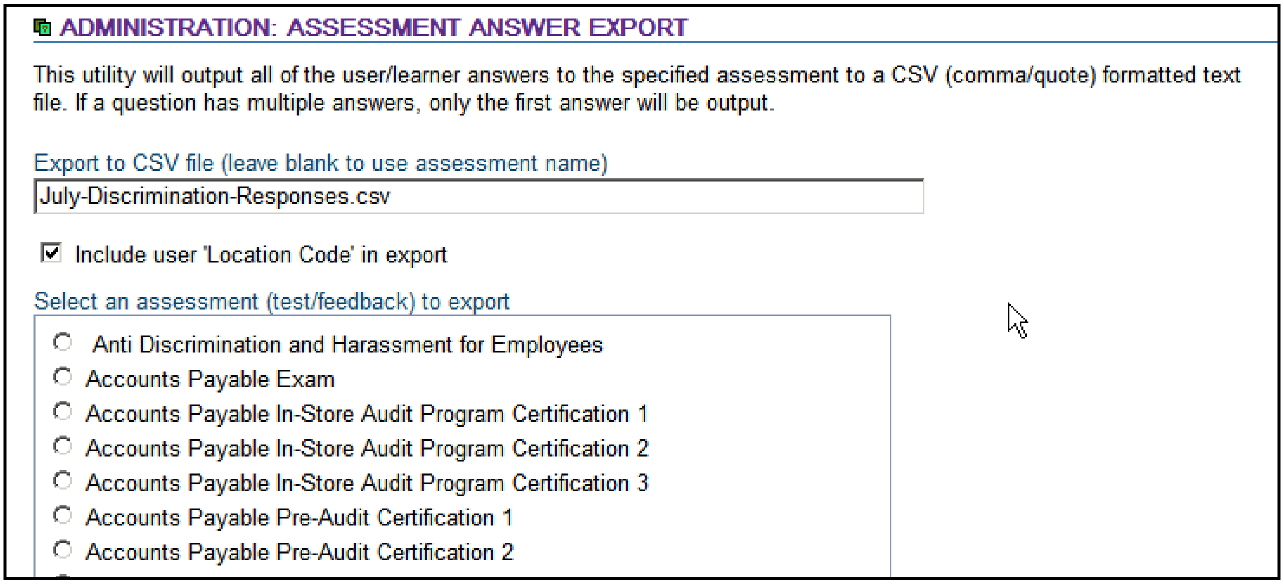


Figure 9-69 – Assessment Answer Export – Step #1 Selection

Step #2 – Scroll to the bottom of the screen and click the Export Answers button (see Figure 9-70 below). When your export has been generated, you'll be returned to the Export Options screen.

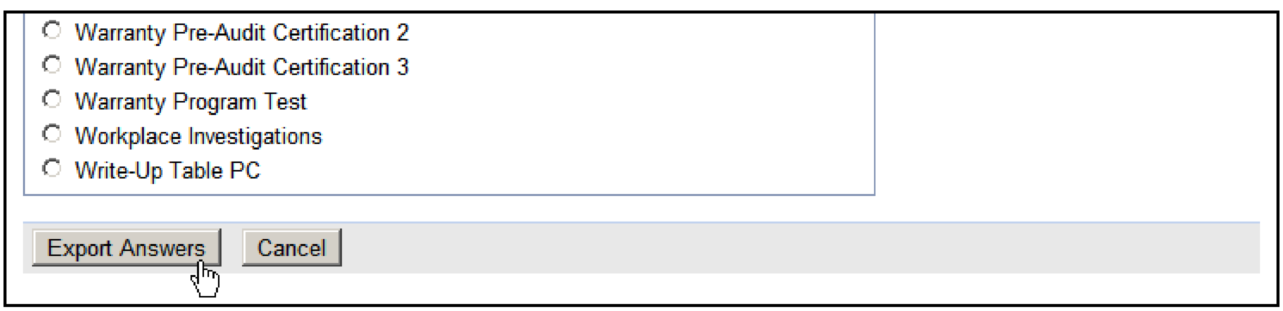


Figure 9-70 – Assessment Answer Export – Step #2 Generation

Step #3 – Select and download the output file you generated from the Administration: File Upload/Download submenu using the Export directory (see Figure 9-71 below).

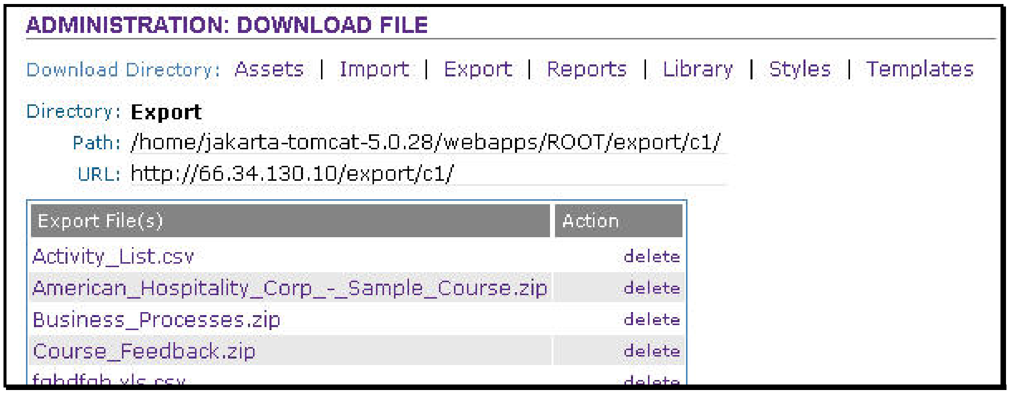


Figure 9-71 – Assessment Answer Export – Step #3 Download

9.9.8 – Export SCORM Course

This selection allows Site Administrators to export OnPoint Courses as a SCORM-compliant course that can be transferred to another standards compliant Learning Management System as/if needed. SCORM is an acronym for the "Shareable Content Object Reference Model", and exists as a collection of standards and specifications adapted from multiple sources to provide a comprehensive suite of e-learning capabilities that enable interoperability, accessibility and reusability of Web-based learning content. The SCORM specification is managed by a standards committee and overseen by the Advanced Distributed Learning (www.ADLNET.org).

Courseware created inside OnPoint's Course Manager application can be exported out of OPLS and imported into another system. The export function creates a self-contained Zip Package that contains all of the content Pages and their associated Asset files and also includes a SCORM compliant manifest file that makes it easy for other LMS platforms to import the exported content.

Step #1 – Select the "SCORM Export" option from the Export Options selection list. The displayed screen provides instructions and a set of Course selection and optional re-naming functions that permit a Root or Site Administrator to pick a Course for SCORM export. The Zip Package containing the exported Course can either retain the original name or the Administrator can supply their own unique name as desired. The Administrator can also choose whether to export the selected Course in one of two SCORM specifications – namely, the widely used SCORM v1.2 or the newer SCORM v1.3 (2004) specification using the drop down selector. (See Figure 9-72 below for details). Click the Export button to activate the SCORM export function or click the Reset button to clear your entries.

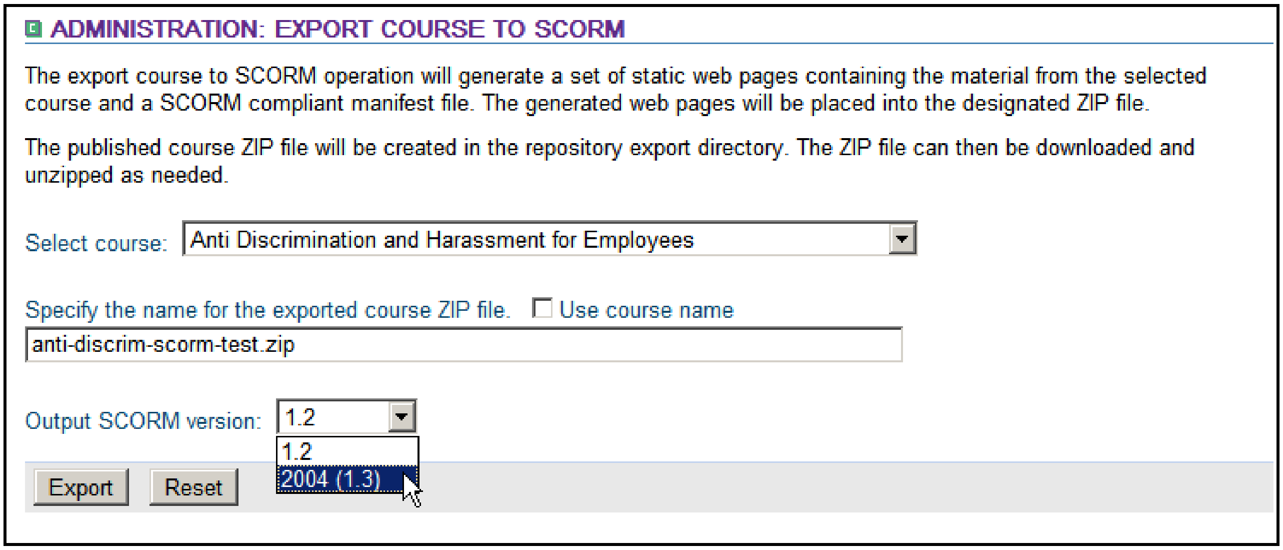


Figure 9-72 – SCORM Export – Step #1 Selection

<u>Step #2</u> – Once the SCORM Export utility has run, the screen updates to a show a summary of the results for the selected SCORM-exported Course and provides a Download link that aids the Administrator in managing their new output (see Figure 9-73).

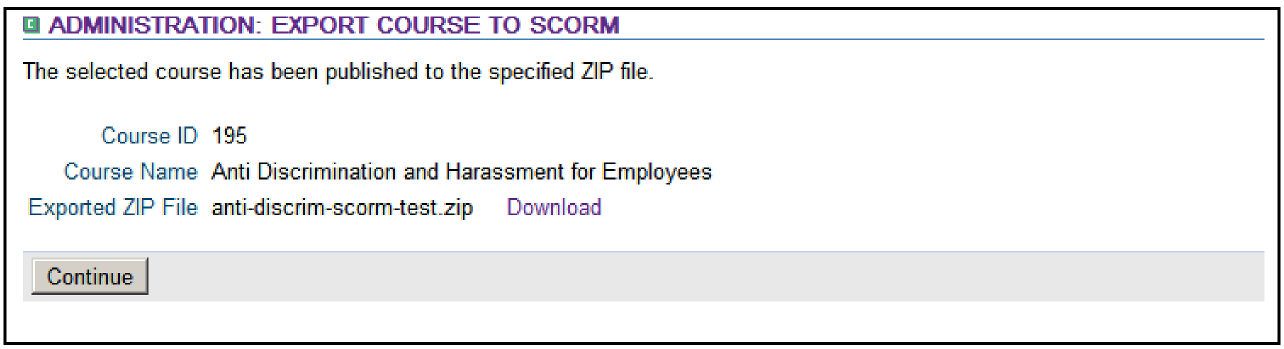


Figure 9-73 – SCORM Export – Step #2 Download

<u>Step #3</u> – Clicking the Download link will pop open a dialog box that requests instructions on where to save the prepared Zip Package (see Figure 9-74 below). Click the SAVE button and browse for an appropriate folder to download the ZIP Package to. Once downloaded, you can unzip the SCORM course and examine the contents which will include the necessary SCORM manifest file in either the SCORM v1.2 or SCORM v1.3 format (as you specified in Step #1).

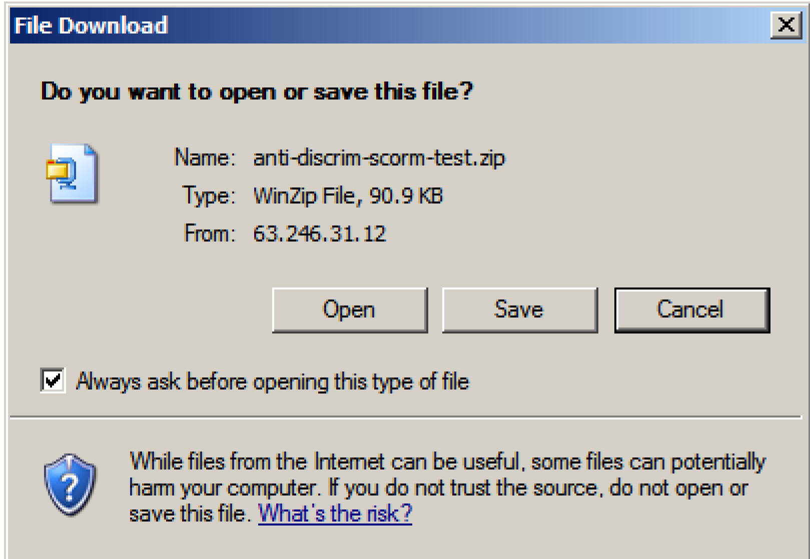


Figure 9-74 – SCORM Export – Step #3 Save/Open Zip Package

9.10 Administration: File Management

This selection accesses a set of utilities for uploading new information (e.g., **Asset** files) in bulk into the shared object repository. In addition, this same set of utilities allows Site Administrators to find and download any collection of **Assets**, Style Sheets, **Reports** or other unique content stored within Course Manager. Generally, this submenu is only available to the highest-level administrative personnel.

Selecting the File Management Submenu selection from the Administrative Menu displays two different submenu screen choices that provide access to a set of utilities for either file uploading into Course Manager from a Site Administrator's workstation or file downloading from Course Manager to a Site Administrator's workstation. When accessing the Administration: File Management dropdown submenu, the two submenu options displayed are shown below (see Figure 9-75).

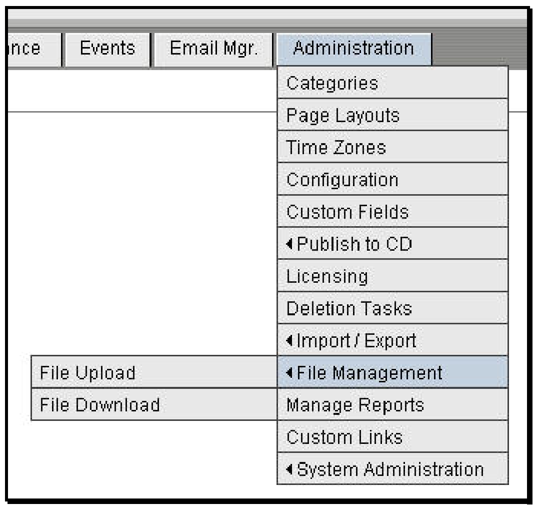


Figure 9-75– File Management Menu/Submenu Selections

9.10.1 – Performing File Uploads (Selective Imports)

Selecting the File Upload selection from the File Management Submenu displays the "Administration: Upload File" screen. From here, Root and Site Administrators can upload any of seven different system file choices by browsing for the file(s) they need to upload and storing these files in their default locations for easy access by users and administrators alike (See Figure 9-76 below). The other major advantage of this feature is it provides a means to replace or overwrite an old version of a file (e.g., a named Asset and obviates the need to create and assign a new Asset to replace an old one).

[**NOTE**: *This File Upload utility will not actually register and activate the files you are uploading into Course Manager; rather, it simply provides a quick means of uploading many of the core files that are used and managed by administrative users like templates, library items, and shared reports*.]

The File Upload Utility allows Site Administrators to upload any of the following:

- Assets
- Imports
- Exports

- Library
- Reports
- Styles
- Templates

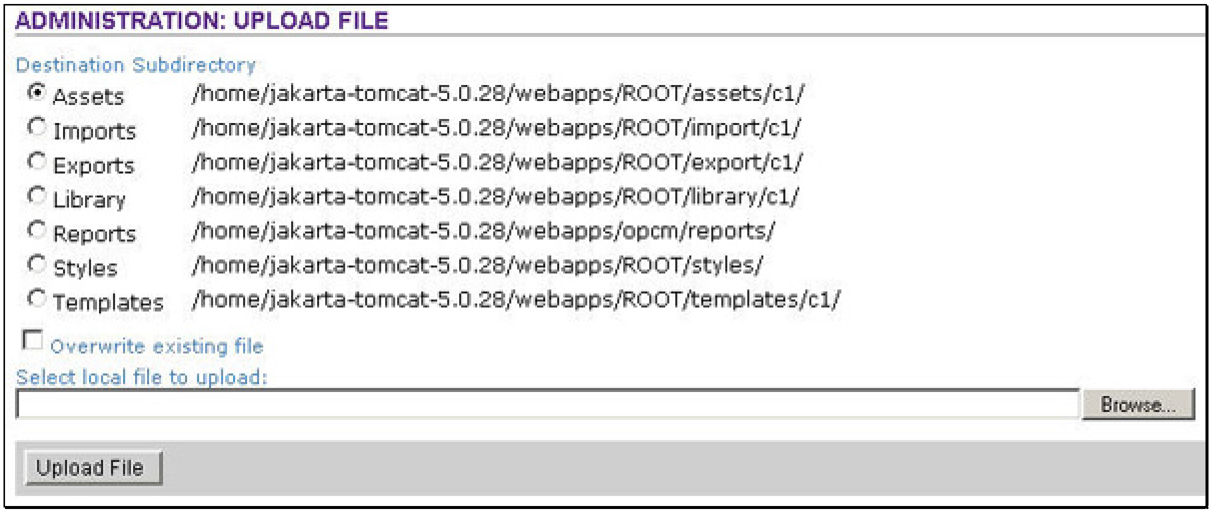


Figure 9-76 – File Upload / Mass Import Utility

9.10.2 – Performing File Downloads

Use the following process to download existing files of various types from the shared Course Manager repository to your local workstation or server:

1. When you choose the File Download dropdown option from the Administration: File Management submenu, the Administration: Download File screen appears (see Figure 9-77 below). From this screen, you can access files grouped by their respective repository assignments (e.g., assets, templates, reports, etc.)
2. Select the “Download Directory” where your files should be found (by their appropriate type) by clicking on the directory link highlighted in blue. Once you’ve selected a directory, a listing of all of the available files will appear in the table.
3. Click the file (or ZIP package) you’d like to download and confirm the location where you’d like the file to be downloaded to.

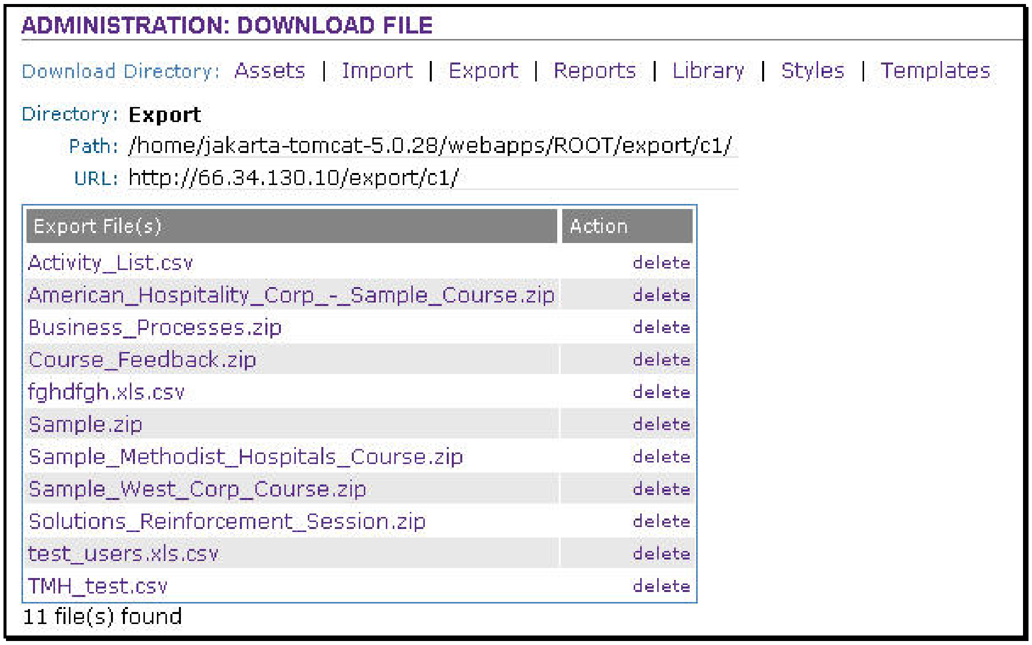


Figure 9-77 – File Download Selection Utility

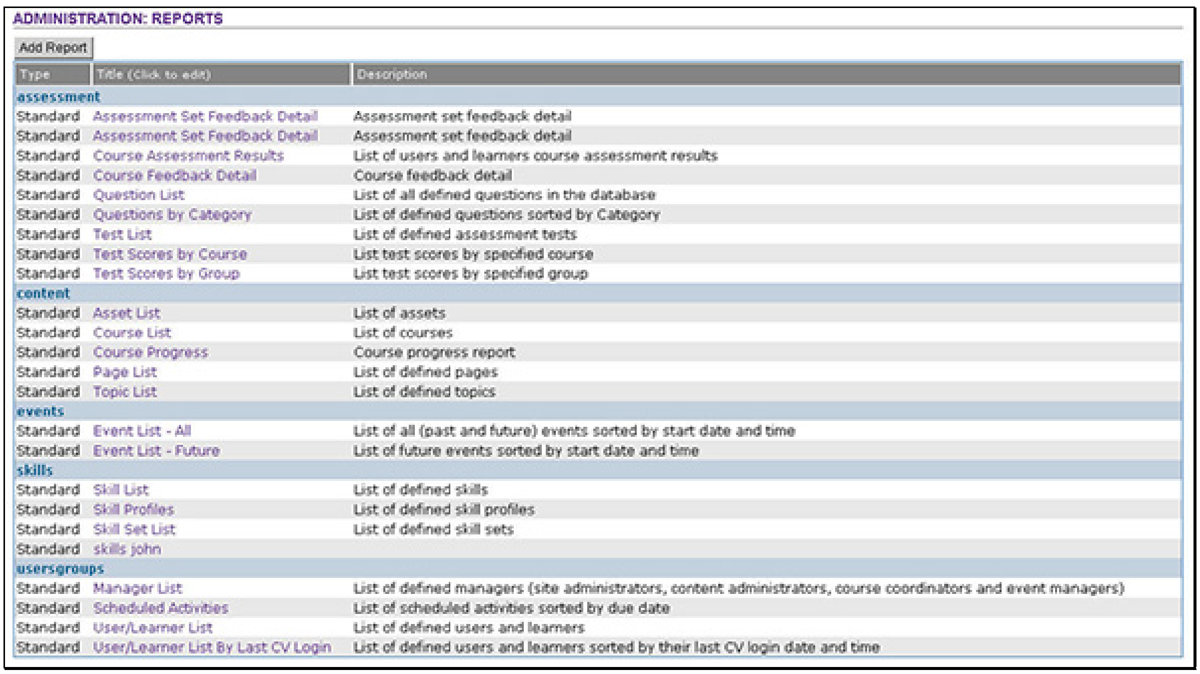
9.11 Administration: Reports

The Reports Dropdown Menu Selection provides a set of utilities for managing the standardized JSP-based reports used by administrative users in Course Manager and also provides functionality to upload new JSP reports as offered or authored internally.

Online Report Management

Selecting the Reports Dropdown selection from the Administrative Menu displays two different submenu screen choices that provide access to lists of defined Reports in the Course Manager database. The Administration: Reports display table lists all of the defined reports in use across your enterprise (See Figure 9-78 below). From this list, you may:

1. Select a defined Report record displayed by its Title and organized by Category, to review or edit by clicking on the blue Report Title field; this action will launch the Administration: Report edit screen where you can review or edit your selection; or
2. Click the Add Report button to add a new Report; this action will launch the Administration: Reports edit screen where you can define a new Report record.


ADMINISTRATION: REPORTS

Add Report

Type	Title (Click to edit)	Description
assessment		
Standard	Assessment Set Feedback Detail	Assessment set feedback detail
Standard	Assessment Set Feedback Detail	Assessment set feedback detail
Standard	Course Assessment Results	List of users and learners course assessment results
Standard	Course Feedback Detail	Course feedback detail
Standard	Question List	List of all defined questions in the database
Standard	Questions by Category	List of defined questions sorted by Category
Standard	Test List	List of defined assessment tests
Standard	Test Scores by Course	List test scores by specified course
Standard	Test Scores by Group	List test scores by specified group
content		
Standard	Asset List	List of assets
Standard	Course List	List of courses
Standard	Course Progress	Course progress report
Standard	Page List	List of defined pages
Standard	Topic List	List of defined topics
events		
Standard	Event List - All	List of all (past and future) events sorted by start date and time
Standard	Event List - Future	List of future events sorted by start date and time
skills		
Standard	Skill List	List of defined skills
Standard	Skill Profiles	List of defined skill profiles
Standard	Skill Set List	List of defined skill sets
Standard	skills john	
usersgroups		
Standard	Manager List	List of defined managers (site administrators, content administrators, course coordinators and event managers)
Standard	Scheduled Activities	List of scheduled activities sorted by due date
Standard	User/Learner List	List of defined users and learners
Standard	User/Learner List By Last CV Login	List of defined users and learners sorted by their last CV login date and time

Figure 9-78 – Report Management Utilities

Adding a New Standard Report (JSP)

From time to time, OnPoint's Support Team will create and make available new reports that can easily be uploaded into Course Manager and utilized by your organization to help monitor the actions and progress of your learning community. Alternatively, some organizations with in-house Java development resources may wish to create their own custom reports (as Java Server Pages or "JSPs") which they'll need to upload into their OnPoint database instance.

1. To add a new report, click the Add Report button found on the Administration: Reports table listing; you are then presented with the Administration: Add Report screen (see Figure 9-79 below).
2. Enter the summary information about the new report including a name and a short description.
3. Browse for and select the new report file (*.jsp) from your local workstation or server directory.
4. Next, you can assign the new report to appear under any of the other top-level menu options or Application Sections you'd like by selecting the menu choice value from the dropdown list.
5. If editing an existing report, you can mark it for deletion by clicking the "Delete this report" checkbox at the bottom of the screen just above the available Action Buttons.

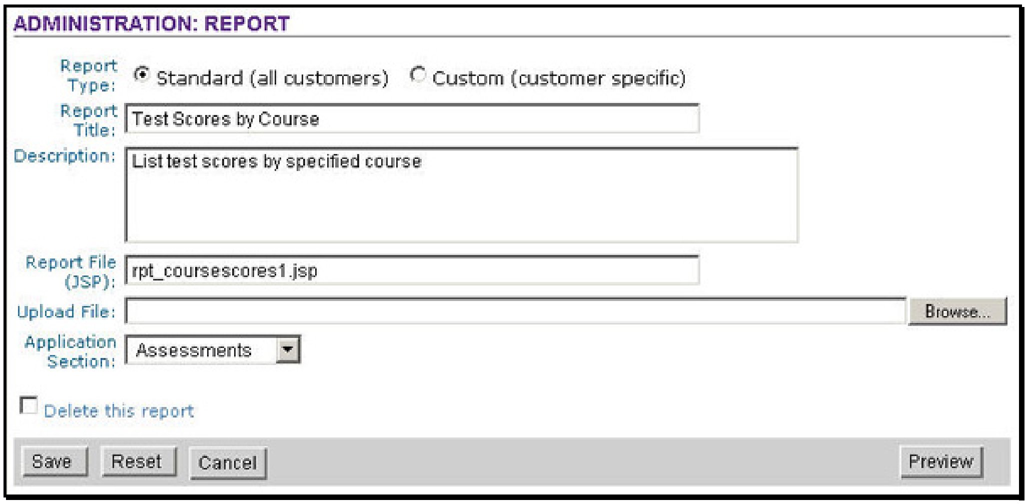


Figure 9-79 – Administration: Manage Reports – Add/Edit Report

The typical Report record display has the following information:

Element/Link	**Description**
Report Title:	The name of the report.
Description:	The short description of the report.
Report File (JSP):	The file name of the report (*.jsp).
Upload File:	Used when browsing for a new report file.
Application Section:	The top-level menu caption this report has been assigned to appear under.
Delete this Report:	A checkbox option that, when selected, will mark the report for deletion.

9.12 Administration: Custom Integration/Links

For select customers, the final submenu option on the Administration menu is Custom. In these cases, this screen will have links to other customized utilities and integration routines that have developed to further integrate that enterprises' other application platforms and online databases. Examples of these integration routines include creating linkage between other Learning Management System ("LMS") platforms, Human Resources Information Systems ("HRIS") platforms, documentation management systems and other third party assessment applications.

Please contact OnPoint's Support Team to discuss how these higher-level integration functions can be implemented in your environment.