Apprentix Manual v9

featuring Jackdaw Cloud

User Guide

by e-Learning WMB Ltd

www.e-learningwmb.co.uk

Table of Contents

1 About this Manual

This manual has been organised around the major tasks required to set up and then run Apprentix This manual is aimed squarely at administrators and managers of the system (IT staff, Coaches, Trainers, line managers, financial controllers, quality assessors, distributors etc.) and not leaners. All help functionality for learners is inherent in the learner's video tour available on the learner's home screen.

Not all users should start at the beginning of this manual and work to the end (the system may already be populated with learner data, be branded for your organisation etc.), instead the user should skip to the appropriate chapter.

> **NB:** This manual is not designed as a step-by-step guide for system administrators to set up the system, but all the information needed is contained herein.
>
> If you are looking to set up the system it is strongly advised you go straight to **Appendix 6: Onboarding the System into your Organisation.**

Do not worry should you never read the rest of this manual - if that is the case then we have done our jobs well and designed a truly intuitive system. The system has been ergonomically designed and there is context relevant help videos displayed on each page.

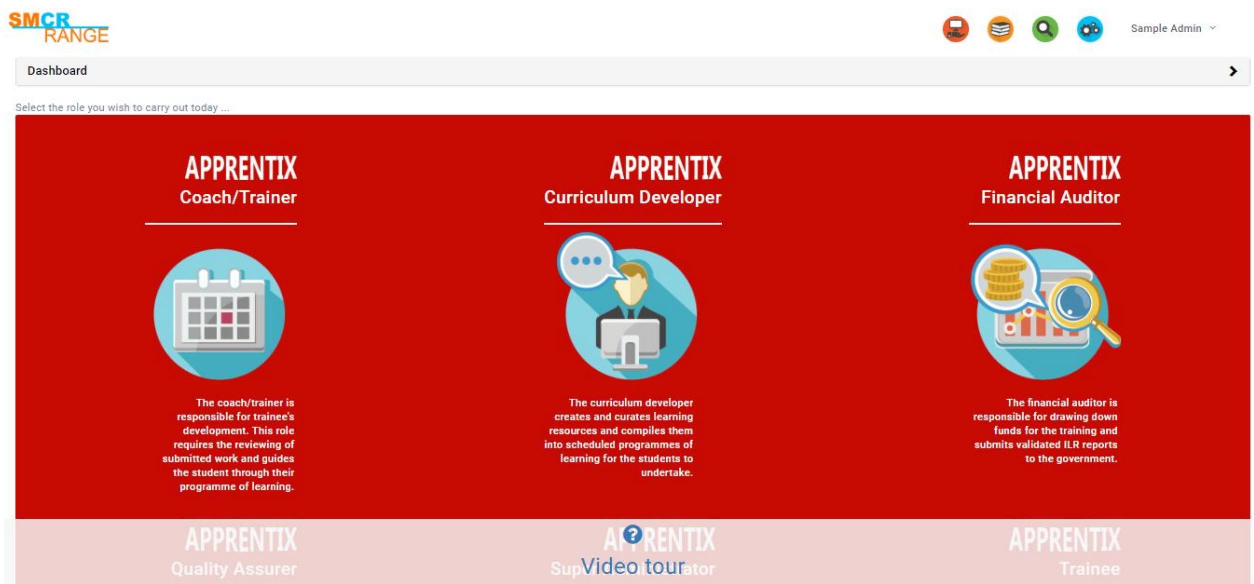
2 Log In

Browse to the login.php page (this will have been set up for you by Open Elms and contain your organisation's branding - usually under the format *https://openlms.e-learningwmb.co.uk/companyname*). Log in with the details supplied by e-Learning WMB.

N.B. There are many options for logging into the system by using Single Sign On technologies - these will be explored later in this manual.

3 Welcome Screen

The welcome screen is the system's primary menu - it is only visible if the user type has more than one role (e.g. a Super Administrator who is also a Coach/Trainer etc.) If the user has only one role then this screen is skipped.



N.B. Different roles have a different interface, this manual deals with each role in turn. Only access the section of the manual which applies to your role.

3.1 Dashboard

At the top of the screen a dashboard may be visible (dashboards can be defined by the system administratrator for each role in the System Settings - this is explained later in the manual).

It can be maximised/minimised by clicking on the arrow to the right of the title bar.

If the user has the Coach/Trainer role, then clicking on the graphs will lead to the data table with the data filtered accordingly.

3.2 Video Tour

A video overview of the entire system is available through the Video Tour link at the bottom of the page. Further video tours exist throughout the system relevant to the current screen.

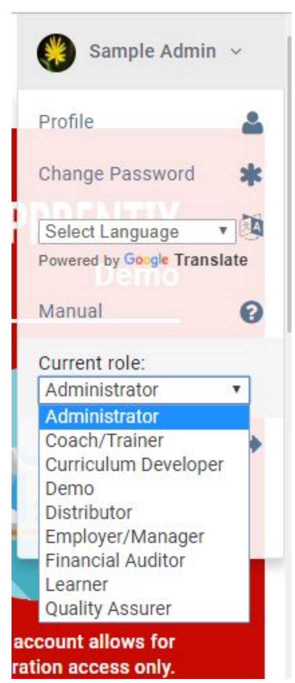
3.3 Functions Menu

If logged in with access to Super Administrator or Financial Reporter functionality, then this menu will be available in the top right of the screen.

From this menu access is available to:

- **manage learning** - this features the core tasks required by the system associated with the selected role;
- **learning library** - is where all learning is stored, added to the system and assigned to learners accounts - the learning can be anything from e-learning to a classroom training session;
- **review** where progress is monitored, bulk emails sent and management reports produced; and finally
- **system setup** is where the organisation's structure and individual learners are set up in the system prior to its use.

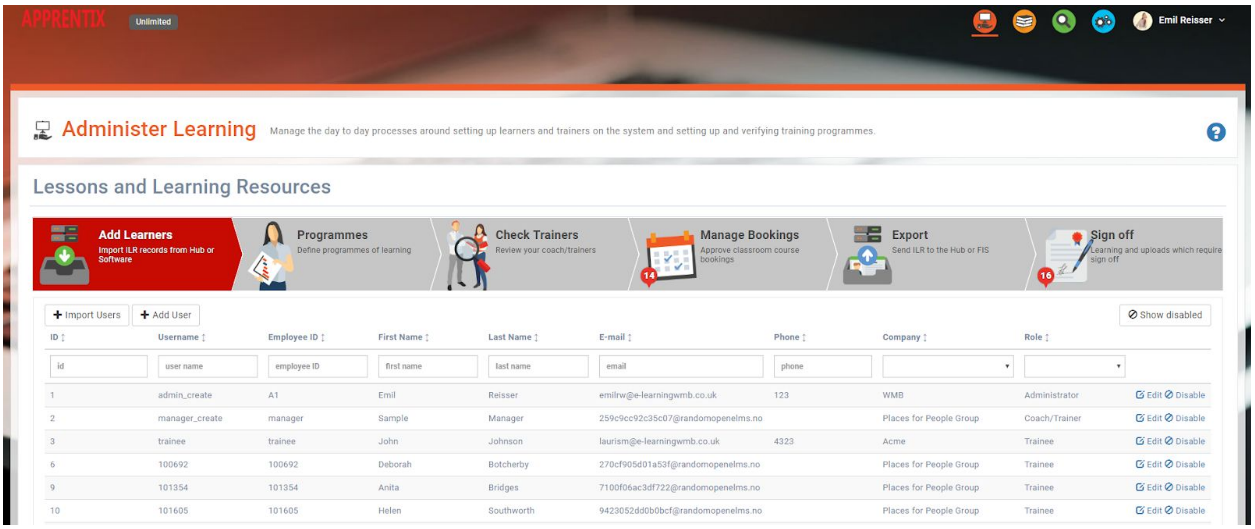
The manual will look at the **manage learning** tasks for each role, since this is the first operation that is needed when first using the system. In the next section skip the roles which do not apply to you, remember you can have more than one role, you can check this in the top right hand menu.



4 Manage Learning

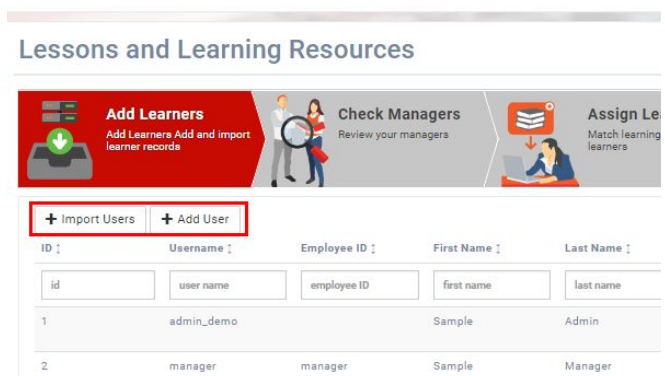
4.1 Super Administrator

The functionality for Apprentix differs from Open Elms described previously.



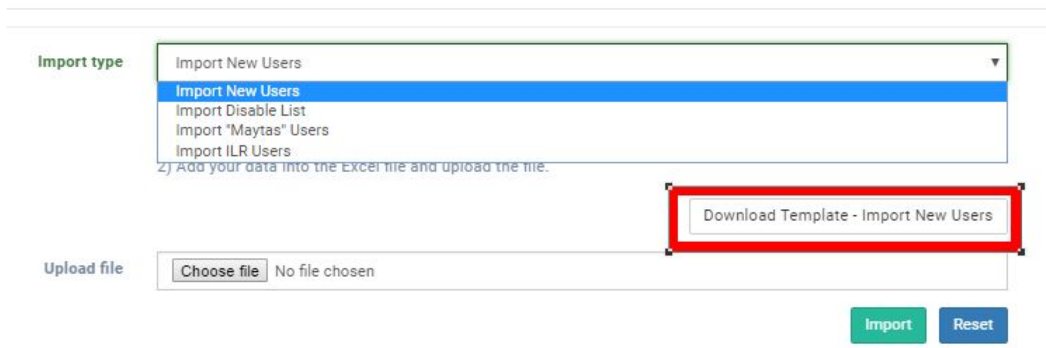
4.1.1 Add Learners

From this screen, the Super Administrator can add any users (learners, managers, fellow administrators etc) into the system.



Learners can be added by importing the data from your current HR Database via the **Import Users** button or by entering the information manually via the **Add User** button.

Users can be imported from a number of different data standards and software packages. When importing, make sure the data is entered into the same format as the provided template, keeping the headers and footers matching those provided.



A Disable List, once imported, will disable those users so that they no longer appear on the system.

Maytas is a software package for handling employee learning records which has a unique data structure, this template allows administrators to import data from that system.

ILR (Individualised Learner Record) is the UK Government XML standard for importing/exporting trainee records, this is a very detailed standard with hundreds of data fields.

4.1.2 Programmes

Learning can also be assigned to learner accounts at the individual level by using Learning Programmes.

Learning programmes are essentially a collection of learning resources that has been mapped to all the skills, knowledge and behaviours needed to meet that programme's learning requirements. There are multiple advantages to using learning programmes in the assigning, tracking and reviewing the data from the learning. If you are in the business of apprenticeships, adult learning, assigning qualifications or any kind of education it is advisable to use Learning Programmes for assigning learning to your population.

In the table is listed the learning programmes available for assigning to learners held within the system.

4.1.3 Check Trainers

Coach/Trainers, tutors, teachers or managers are assigned to learners here. It is important that learners are assigned to someone to oversee their work and offer guidance.

Any unassigned personnel can be accessed via the **Add Learners to Trainers** button, the number on the button in red is the number of such learners

which need to be assigned.

The grid itself alerts the super administrator to when each manager last logged in and the number of employees for which they are responsible.

Pressing the **Add/Remove** button allows the manager to add or remove learners from their charge.

4.1.4 Manage Bookings (by default deactivated)

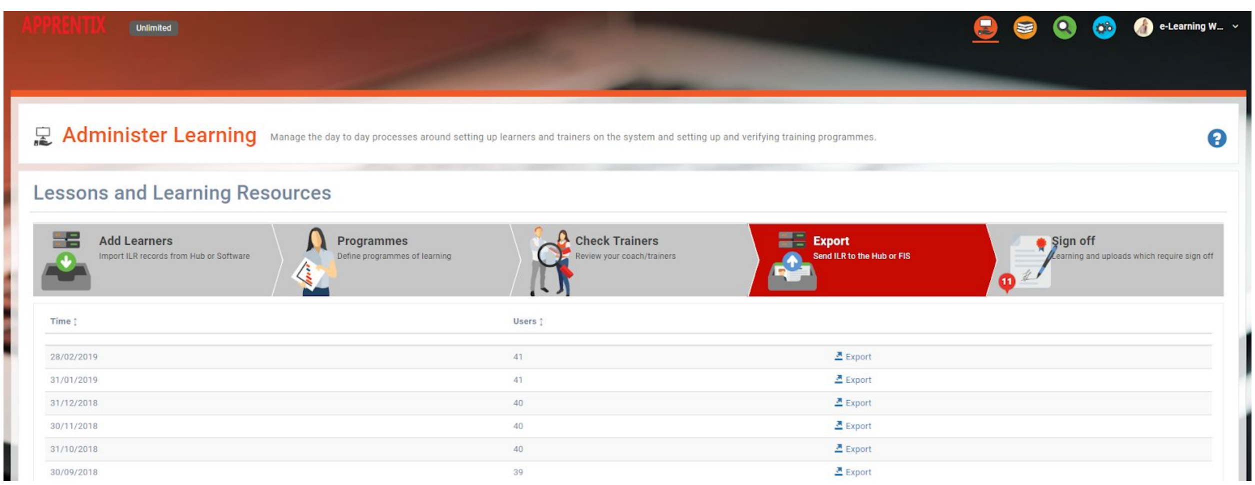
Bookings for classroom sessions or training courses made by learners will often require signing off from the Super Administrator (this can also be done by Coach/Trainers). Here such sessions are listed, which require approval enabling these courses to proceed.

To see this information, this needs to be activated in System Setup > Defaults > Configuration (Make Manage Bookings Optional = true).

4.1.5 Export

Exporting personnel from the ILR is necessary to draw down funds from the UK Government's Hub system. Exports are scheduled monthly and will automatically include funds from all active apprenticeships.

A summary of the number of learners within each export are displayed, along with the date on which that export was scheduled to have been carried out. Each export should be uploaded to the Hub - the export process will validate the file prior to enabling it to be exported (this is a similar process carried out by the FIS system making this now a one-step process.)



4.1.6 Sign Off

The final task listed is to Sign Off any outstanding learning or evidence submitted by the learner as "completed". Some learning can be signed off without any intervention if it is tracked automatically - examples being e-learning and YouTube video content.

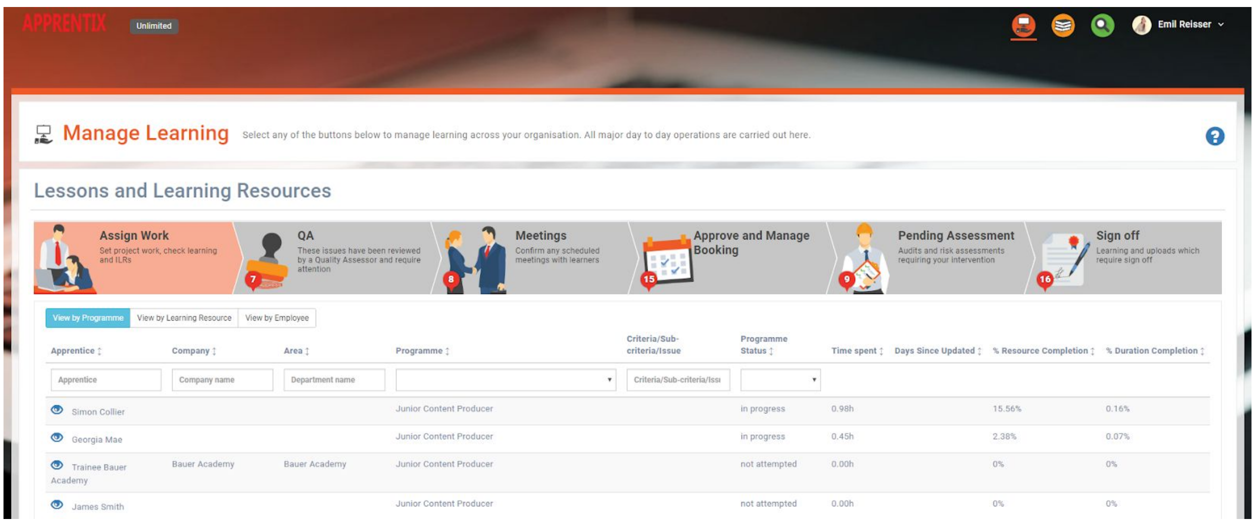
If however a manual sign-off is necessary then the item needs to be approved by pressing the eye link to sign the learning resource off as completed.

4.2 Coach/Trainer

The coach/trainer can be anyone with responsibility for overseeing the training process, this can be a teacher, lecturer, member of HR or line manager. The functional design follows the primary tasks required to achieve this person's management goals.

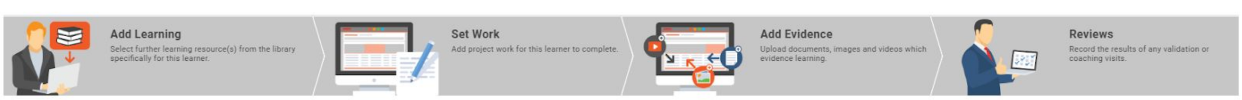
4.2.1 Assign Work

The Coach/Trainer needs to assign work and check on the progress of any persons in their charge. This can be done by viewing the data by Programme, Learning Resource or Employee.



View by Programme

Listing the data **by Programme** shows the status of each training programme for which that trainer has responsibility. The trainer can sort and filter parameters to ensure that programmes with the most urgent needs are dealt with first. Clicking on the eye link will show each programme in greater detail.

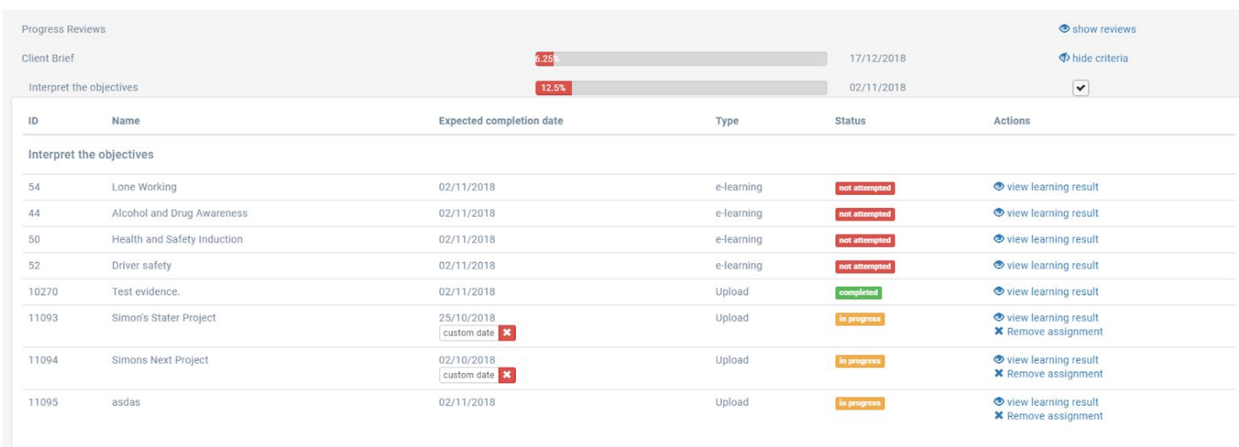


At the top of the screen is a toolbar which enables the trainer to add learning resources to the programme, set project work, add evidence of learning and schedule review meetings

Skill Scan (Optional)

If a skill scan has been applied to the learner's account (see section on **Assign Learning** for details) - then this section appears. Here the underlying skills of an individual can be seen and how they improve over time. Click on the learner's name for further detail of the last skill scan.

Below this, the programme criteria can be examined in greater detail, deadlines amended and work checked.



View by Learning Resource

Viewing the data in this way enables the Coach/Trainer to examine performance across an individual learning resource. This allows the Coach/Trainer to identify trends and carry out batch processes.

View by Employee

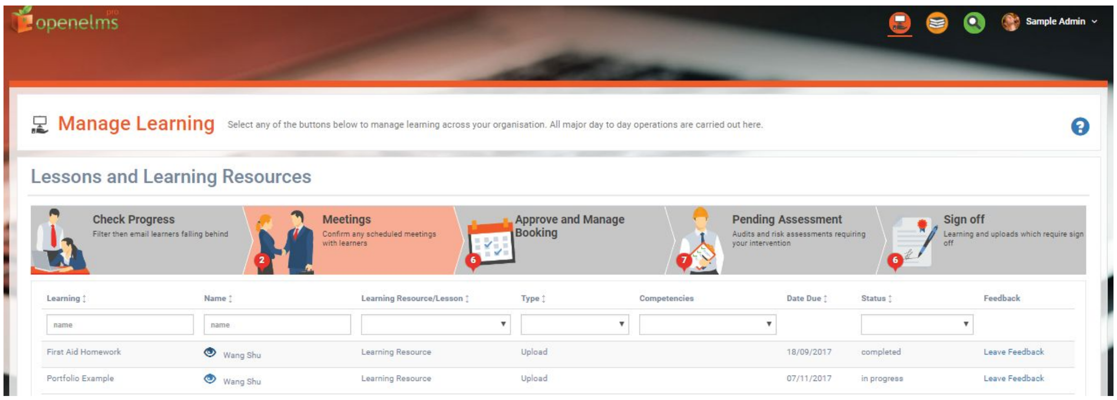
This data view is similar to listing the data by Learning Programme, but focuses on the time each individual spends learning across all programmes.

4.2.2 QA

Any learning resource that has been rejected by a third party Quality Assurer- so that it requires additional amendments - is listed here. Any alterations to each learning resource are monitored and when completed they can be reviewed again for acceptance or rejection (which would reset the review process once again.)

4.2.3 Meetings

Learners will often set up meetings with their Coach/Trainers to discuss progress, submit work etc.; such meetings are listed here.



Clicking on each meeting will bring up details of the meeting and the associated learning resource.

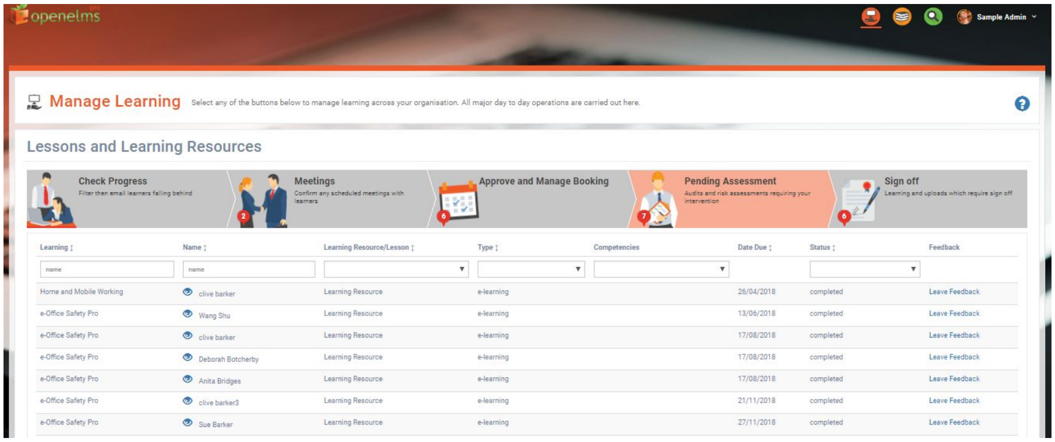
4.2.4 Approve and Manage Bookings

Bookings for classroom sessions or training courses made by learners will often require management approval (there may be some cost element or time away form work which will need signing off) . Here such sessions are listed, which require approval in order to proceed.

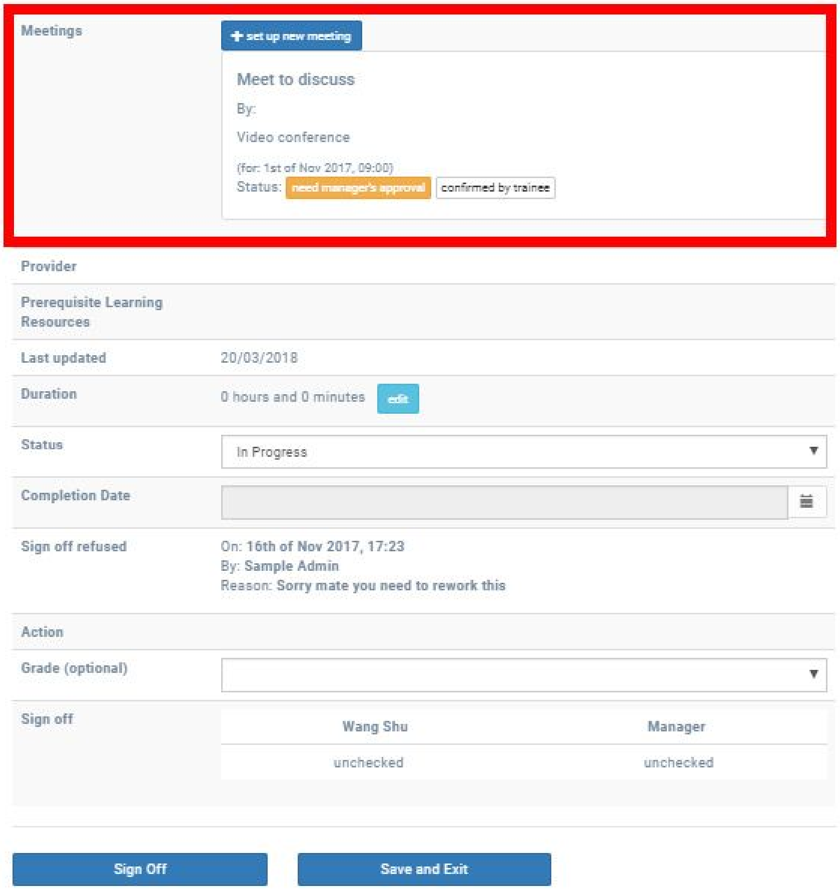
Each classroom session will be defined by the system administrator as needing this level of approval or not.

4.2.5 Pending Assessment

A pending assessment is an add-on to an e-learning module which asks a questions which elicits a task response (examples can include risk assessments, audits etc. - i.e. anything where an action could be created as a response to the learners answer.)



Press the link to see the title of the task and the guidance as to what is needed to resolve each task. The tasks can be actioned and then resolved; an audit trail of the actions taken is recorded. Once an assessment has all its task statuses changed to “Completed” then it will no longer appear on the list of Pending Assessments.



N.B. Task assessments can be easily created using Jackdaw Cloud, conduct audits or risk assessments, create follow up tasks and manage this process. This is additional functionality to that found in standard Learning Management Systems, check with e-Learning WMB to see if you have a Jackdaw Cloud licence if unsure.

4.2.6 Sign Off

The final task listed is to Sign Off any outstanding learning or evidence submitted by the learner as "completed". Some learning can be signed off without any intervention if it is tracked automatically - examples being e-learning and YouTube video content.

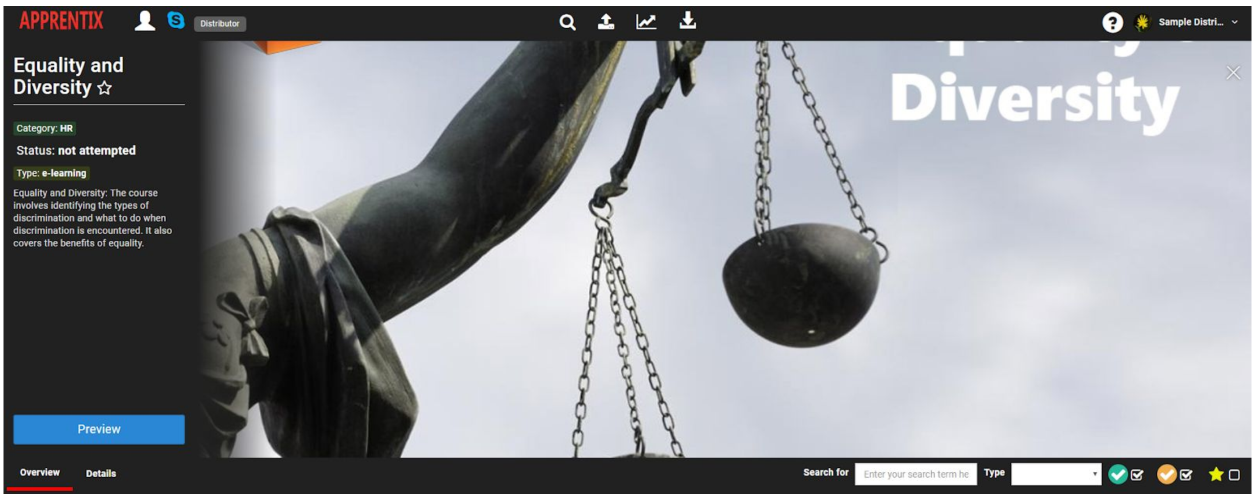
If however a manual sign-off is necessary then the item needs to be approved by pressing the link to sign the learning resource off as completed.

4.3 Distributor

The Distributor role allows e-learning resellers and course authors to distribute e-learning to third-party learning management systems. There are two main parts to this role - the Preview mode and the Distribution mode.

4.3.1 Preview

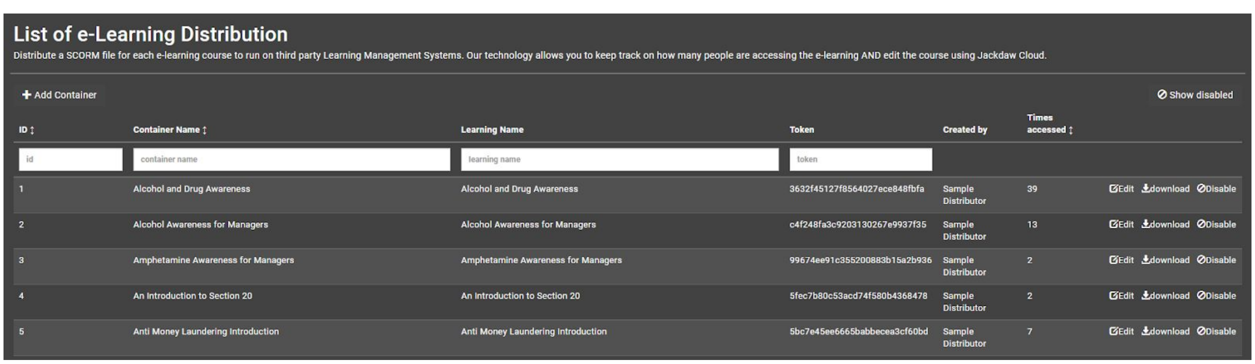
The preview mode is essentially the trainee's role, but it does not record training data. This is used merely for previewing courses on the system.



4.3.2 Distribution

Courses are 'packaged' and distributed to third party learning management systems. The system keeps a track of how frequently each course is accessed, this is important since it allows the distributor to see if any unlicensed course activity is occurring.

Any course which has been added to the system (done using the Super Administrator, Curriculum Developer or Jackdaw User roles) can be distributed. To do this select the **Add Container** button to the top left of the data table.



List of e-Learning Distribution

Distribute a SCORM file for each e-learning course to run on third party Learning Management Systems. Our technology allows you to keep track on how many people are accessing the e-learning AND edit the course using Jackdaw Cloud.

+ Add Container

Show disabled

ID ↕	Container Name ↕	Learning Name	Token	Created by	Times accessed ↕	
1	Alcohol and Drug Awareness	Alcohol and Drug Awareness	3632f45127f8564027ece848fbfa	Sample Distributor	39	Edit download Disable
2	Alcohol Awareness for Managers	Alcohol Awareness for Managers	c4f248fa3c9203130267e9937f35	Sample Distributor	13	Edit download Disable
3	Amphetamine Awareness for Managers	Amphetamine Awareness for Managers	99674ee91c355200883b15a2b936	Sample Distributor	2	Edit download Disable
4	An Introduction to Section 20	An Introduction to Section 20	5fec7b80c53acd74f580b4368478	Sample Distributor	2	Edit download Disable
5	Anti Money Laundering Introduction	Anti Money Laundering Introduction	5bc7e45ee6665babbecea3cf60bd	Sample Distributor	7	Edit download Disable

Here a name is given to this course distribution package and an e-learning module is selected - there is no need to worry about entering a token as this will be generated automatically by the system. Once the course package has been created, the associated SCORM v1.2 zip file can be distributed by selecting the **download** link in the data table. This can be added to any SCORM v1.2 compliant Learning Management System in the usual way.

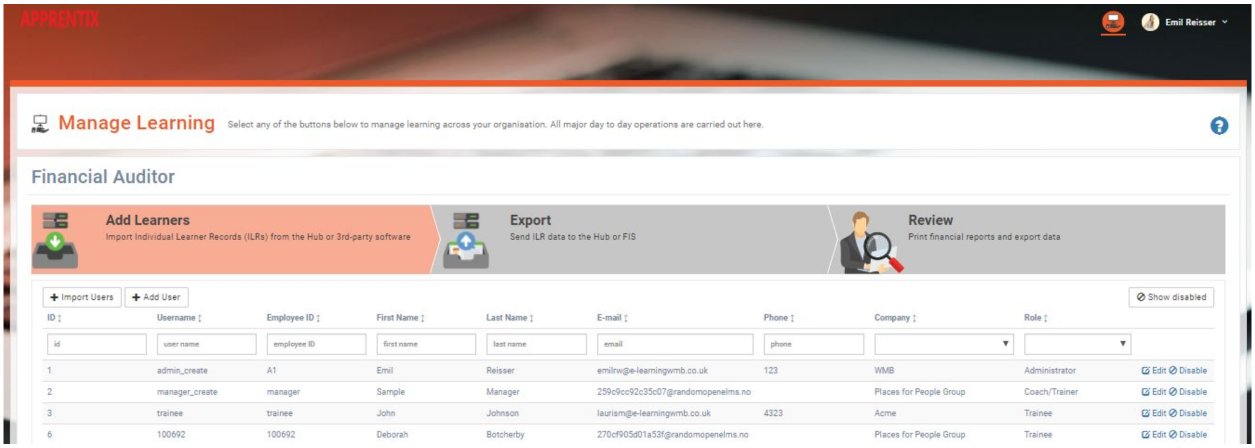
N.B. Distributor access is usually only granted to resellers of e-learning WMB's courses by default. Should you wish to activate this functionality on your system please contact e-Learning WMB.

4.4 Financial Auditor

The financial auditor is responsible for the reporting duties for the drawing down of funds from the UK government, these funds are usually associated with apprenticeships. The functionality given to this role includes the adding of learners onto the system using the ILR format, exporting information in that format to the Hub or FIS which allows the drawing down of funds and a Review of this process which gives a summary of the amount of money earned.

4.4.1 Add Learners

Learners can be added either via an import or added manually using free text fields. This process is defined elsewhere in the Administration section of this manual.



4.4.2 Export

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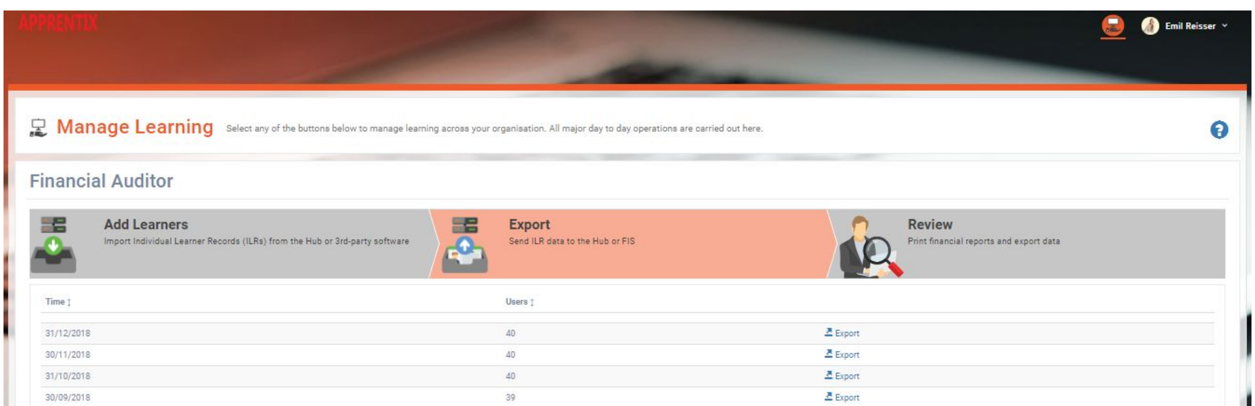
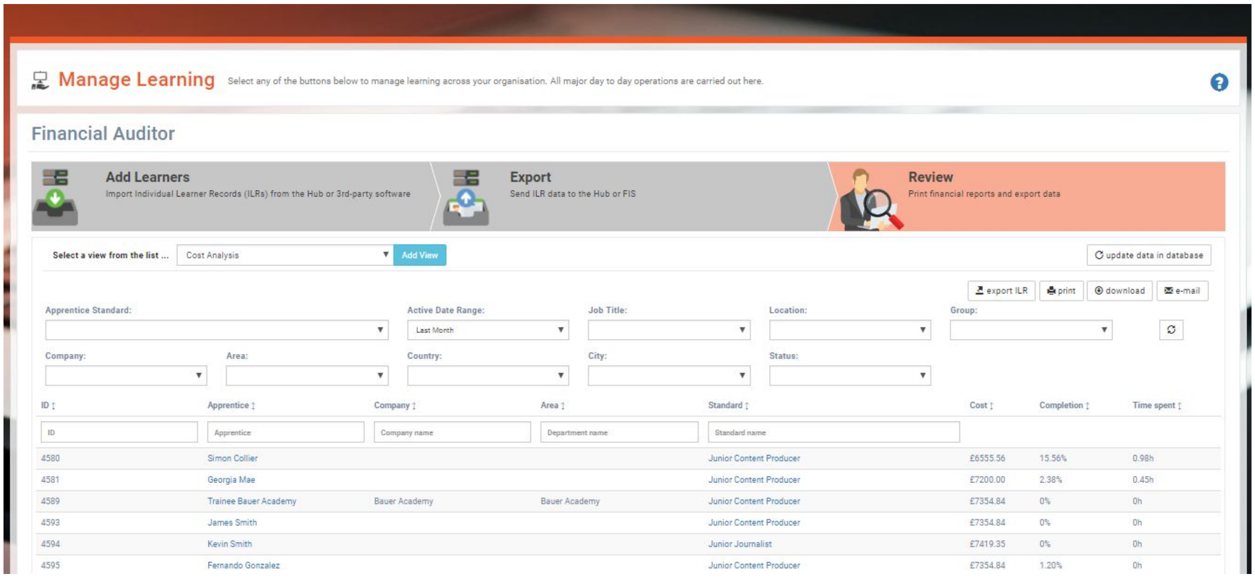


4.4.3 Review

This shows the reporting functionality within the system. Here reports can be accessed and created.

Report queries can also be used for downloading data for exporting to Excel etc or setting up email reminders based on search criteria.

This is a copy of the functionality found in section 6 later in this manual.



4.5 Curriculum Developer

The curriculum developer is responsible for curating and creating learning content to add to the system. This functionality is described in detail elsewhere in section 5 of the manual; yet the functionality contained within this role will be summarised.

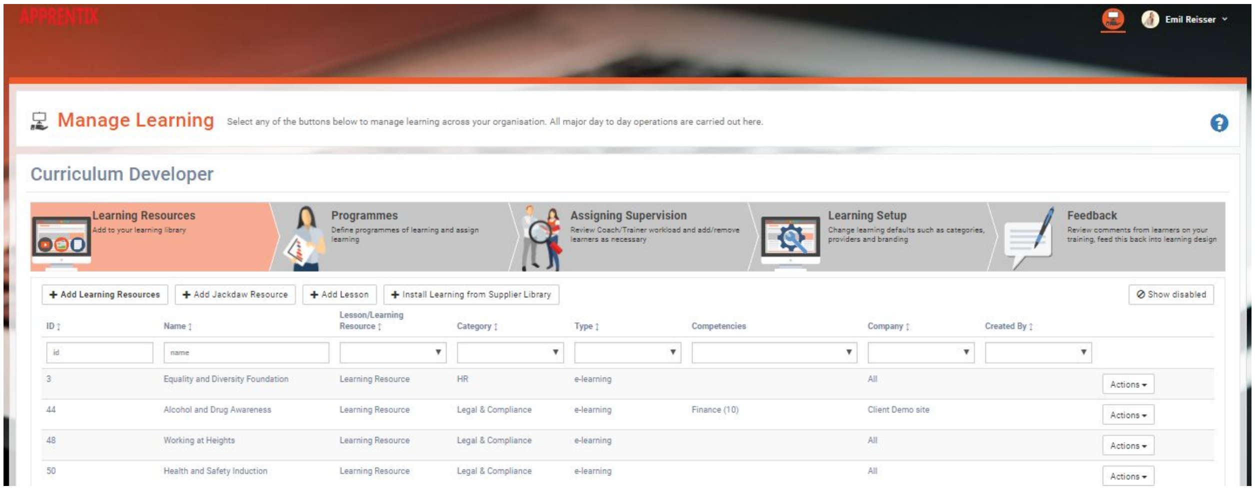
4.5.1 Learning Resources

Add any type of learning resource to the system from Blog Entries to YouTube videos by selecting the **Add Learning Resources** button and then selecting the appropriate learning resource type.

e-Learning can be created and added to the system by selecting the **Add Jackdaw Resource** button.

Learning resources can be grouped together and assigned to a learner's account by selecting **Add Lesson**.

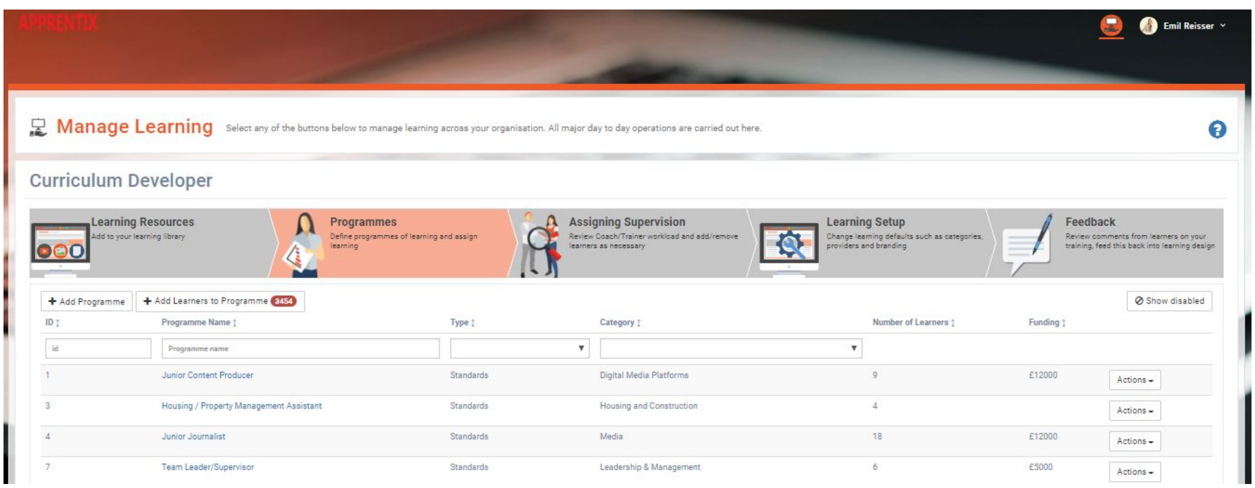
The system will also come with a library of learning content from your supplier (depending upon whether this has been purchased or not.) Select the **Install Learning from Supplier Library** to add a new learning resource.



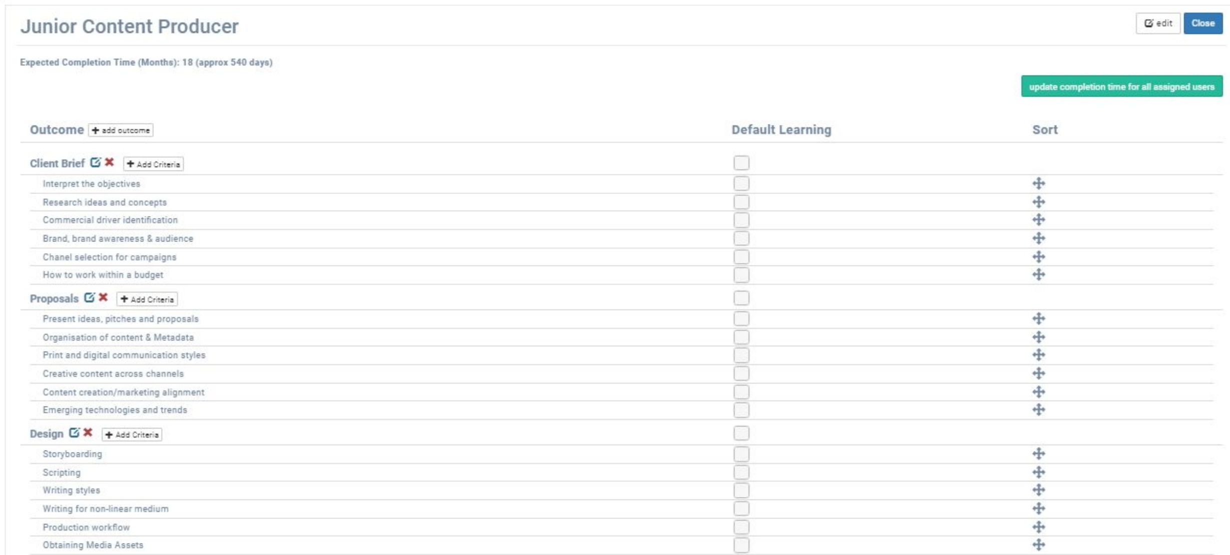
4.5.2 Programmes

Programmes of learning are a collection of learning resources and lessons which are combined within a timeframe to delivery a qualification such as an apprenticeship. The **Add Learners to Programme** button has the number of learners without a programme assigned to them listed on the button (in this case 3454). Learners can be added to any programme in the system by selecting this button.

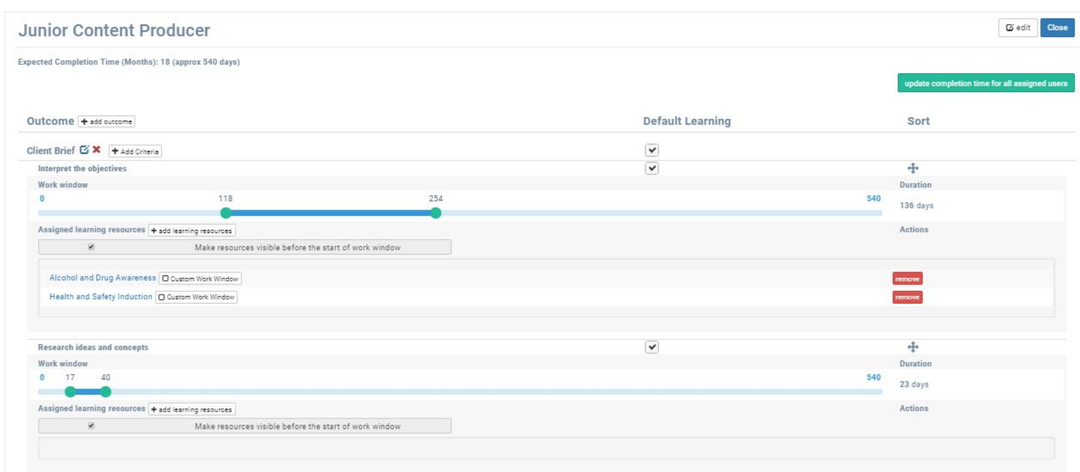
Programmes can be added by selecting the **Add Programme** button.



Within each programme the outcomes, criteria and subcriteria of a programme can be defined and their order sorted.



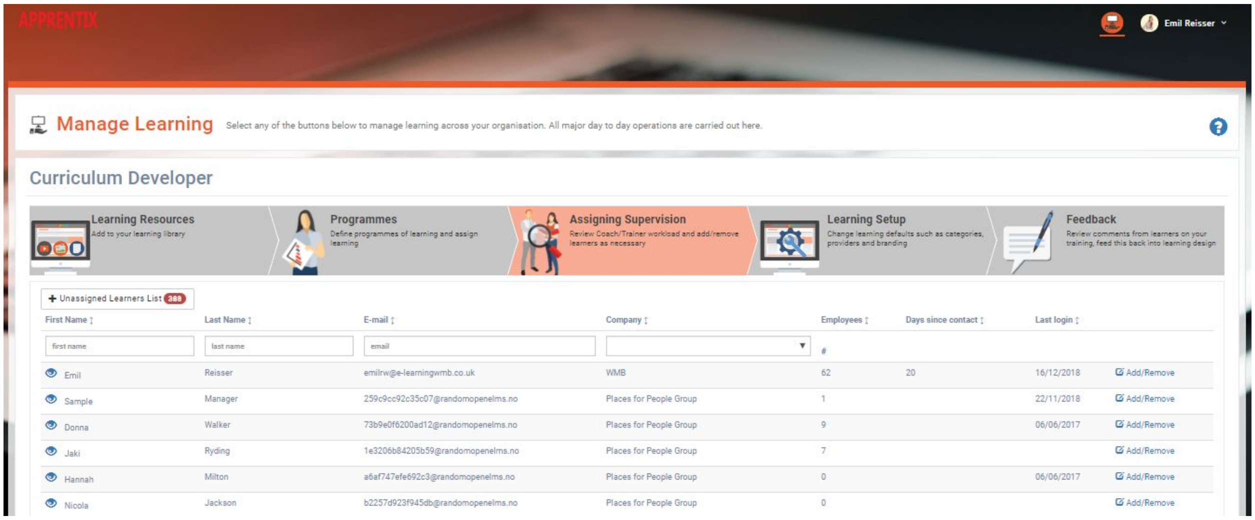
Each criteria can have a timeframe attached to it, so the work can be scheduled appropriately; for instance with an apprenticeship it is important to advance basic skills to the start of the apprenticeship which underpin future learning and allow the apprentice to start working and be an asset to the company when practising those skills as soon as possible.



4.5.3 Assigning Supervision

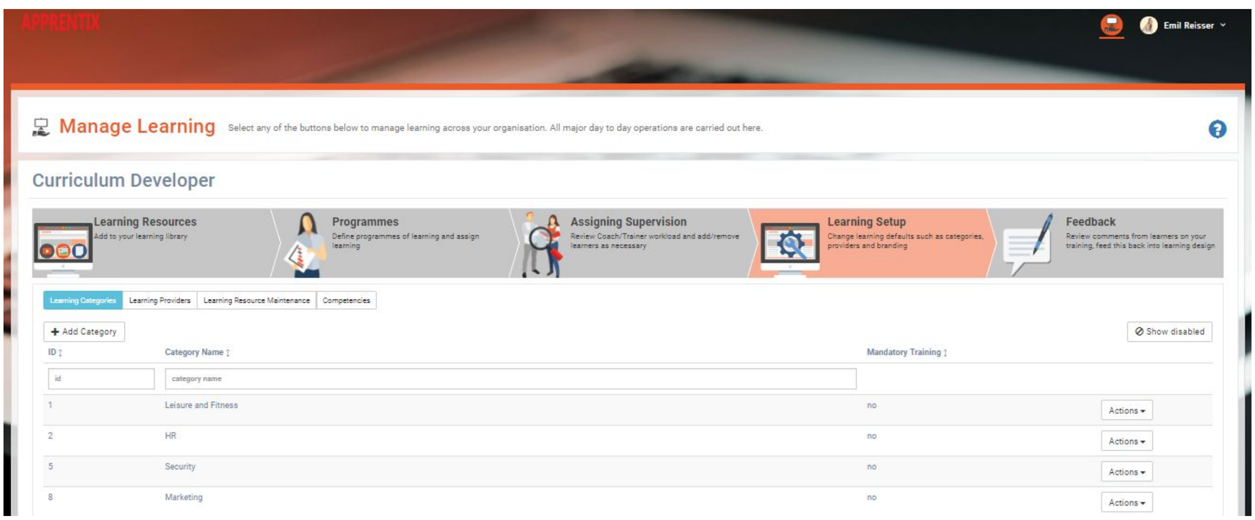
Learners can be added or removed from the supervision of coaches, trainers, managers etc from this table. Each manager is listed and selecting the **Add/Remove** link will alter the employees under the supervision of each.

The number of unassigned learners is listed on the **Unassigned Learners List** button. Clicking on this button will enable the assigning of further learners to each Coach/Trainer (such personnel are defined as such in the Admin section of the system.)



4.5.4 Learning Setup

Learning options in the Admin > System Setup are defined here. Learning Categories, Providers, branding and Competencies (which can be linked to learning resources) are defined in this section.



4.5.5 Feedback

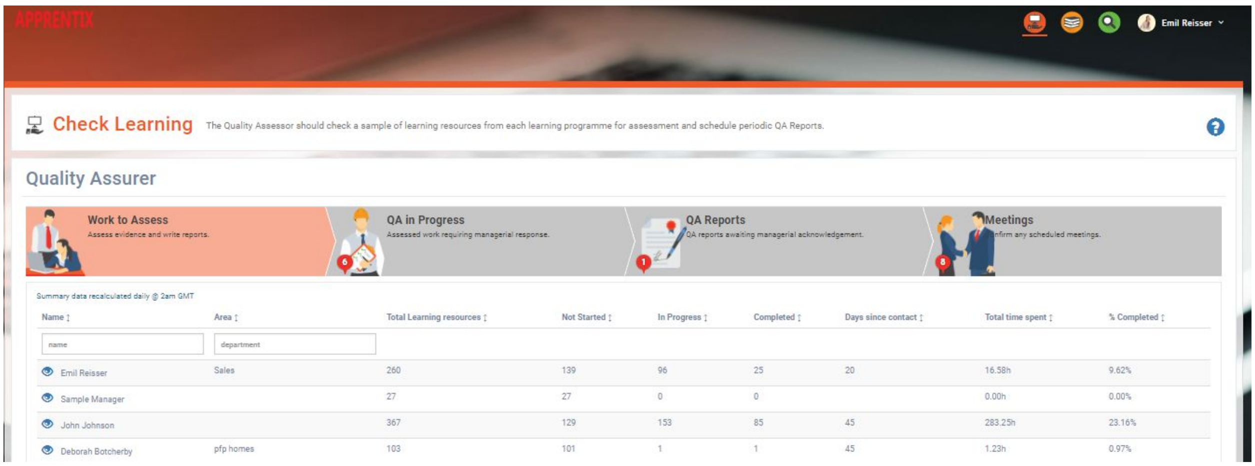
The curriculum developer should monitor feedback on their learning resources so that they can continually improve them.

4.6 Quality Assurer

The quality assurer is tasked with assessing learning programmes to see that they are meeting the approved standards; this functionality can be used for internal review as well as external inspection for scheduling periodic sampling, reviews and final sign off of the programmes of learning.

4.6.1 Work to Assess

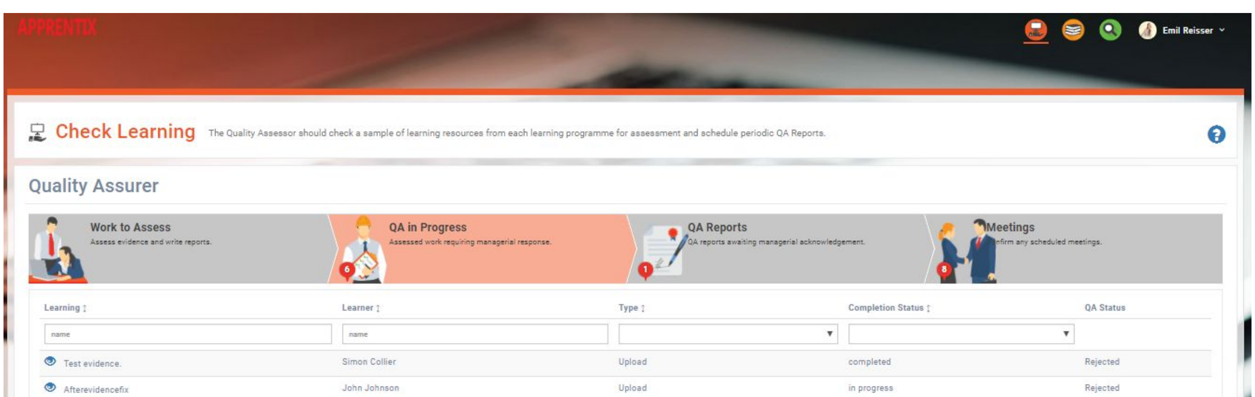
This section lists all of the programmes of learning available for assessment. Each programme has recorded the number of learning resources available, the status of each resource etc. The **Days since contact** is the most important since this enables the QA at a glance to see which programmes are in the most urgent need of attention.



Clicking on each learning resource will reveal that programme in greater detail so that individual learning resource can be Accepted or Rejected by the QA, this information is then fed back to the manager of that programme for further action or acknowledgment.

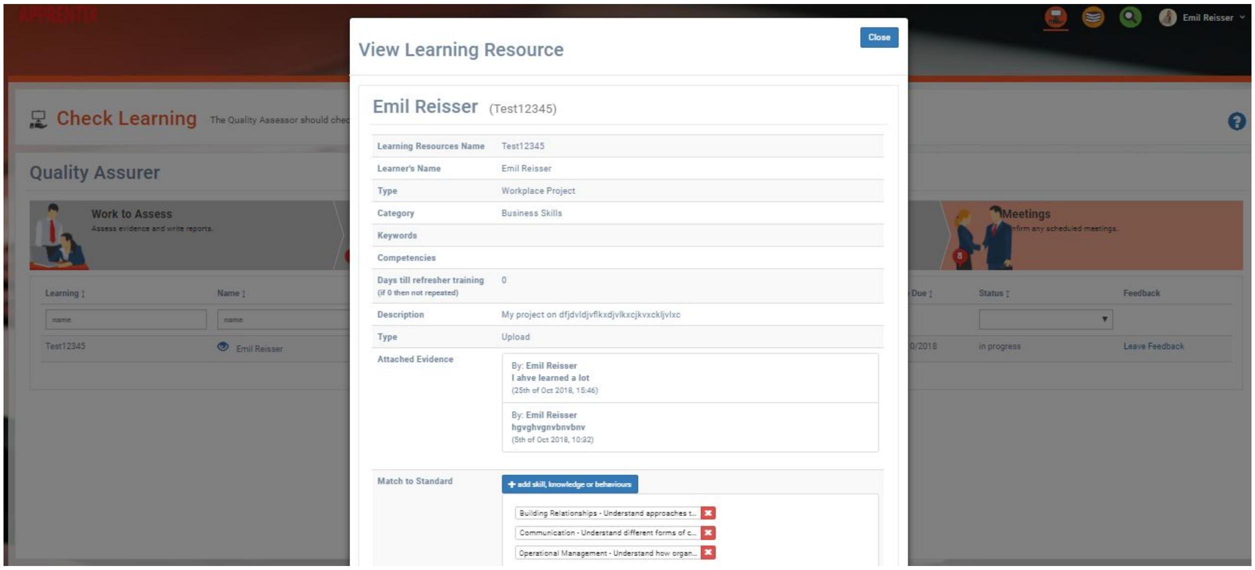
4.6.2 QA in Progress

Any learning resource that has been rejected - so that it requires additional work by the learner - is listed here. Any alterations to each learning resource are monitored and when completed they can be reviewed again for acceptance or rejection (which would reset the review process once again.)



4.6.3 QA Reports

Reports can be produced of each review carried out by the QA. Within each report visits are logged including any comments the QA may have about the programme and learner's progress.

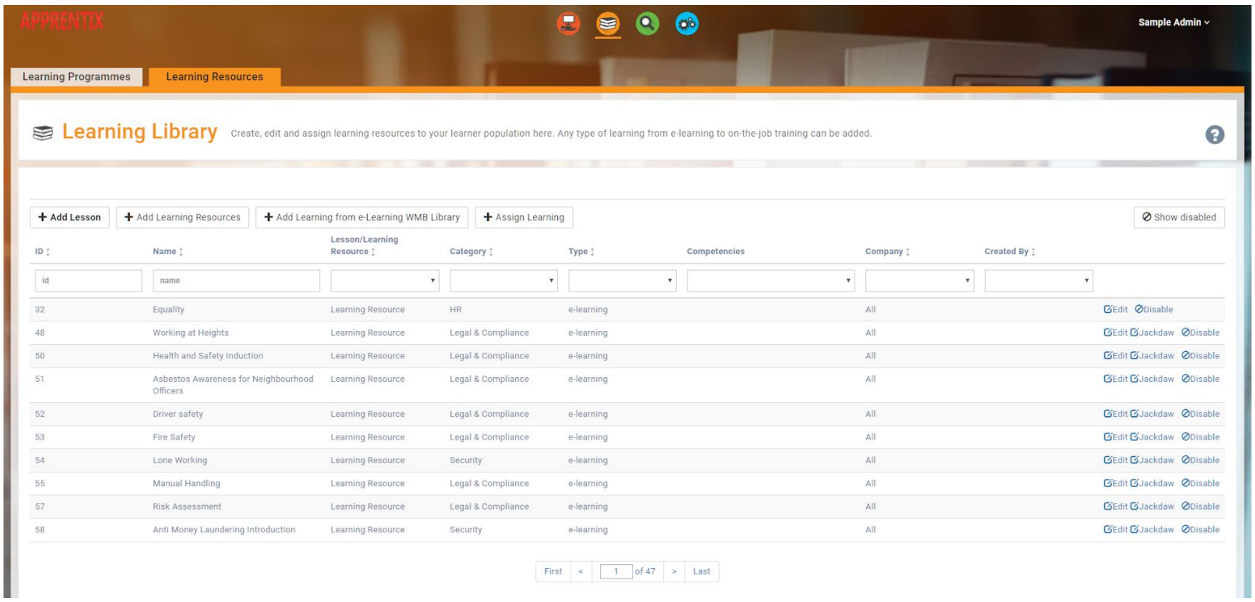


4.6.4 Meetings

Meetings are recorded concerning any meetings that have been made concerning issues arising from the performance any learning resource. A face-to-face meeting may be necessary to clear up any assumptions made by the learner in QA regarding the associated peace of work.

5 Learning Library

Once the organisational structure and other default values have been set up in the **System Setup** section, it is necessary to add learning to the system. This section of the manual assumes that Open Elms TMS has been purchased which handles all types of training (otherwise simply review procedures surrounding the addition of e-learning and YouTube videos.)



5.1 Learning Resources

Open Elms Pro is able to add any type of learning to the system. This includes:

- Lessons
- YouTube
- Evidence - uploaded tasks and evidence of learning by learner or Coach/Trainer
- Book/CD/DVD
- Classroom Training
- On the Job Training
- Website/web document
- e-Learning (existing and new)

Each type of learning has the following common features:

Name

A name which the learner uses to search for the learning resource on the system. It is also displayed to the learner over the default thumbnail image when browsing the system.

Category

The learning category used for filtering data when reviewing and searching the learning resources.

Learning Lesson Code

This is a code used internally for identifying the learning. This code is not displayed but the user will include this on keyword searches.

Keywords

Keywords are not displayed but are used for keyword searches.

Description

It is a good idea to enter a course description for all learning into the system has the information is used to describe the learning as well as for keyword searches.

Available for Self Enrollment

Checking on this box makes the learning resource accessible to any learner in the system; it is not mandatory but available to anyone should they wish to access this learning.

Require Management Approval

This checkbox is checked if a manager needs to approve the learner accessing the learning prior to it being carried out. There may be a cost element associated with the learning or take the learner away from work for a long period of time, this check allows managers to check schedules and budget accordingly prior to approving the training.

Company Access

Some learning resources may be restricted to certain companies (e.g. a customised version of a standard lesson, an enrollable learning resource purchased specifically for a specific company etc.) Checking on this box restricts access to the resource to the company selected.

The days till the learning resource is due

This denotes the number of days after the course is assigned that it is flagged as overdue. Once a course is overdue, then it will be flagged to the coach/trainer - as well as appearing in the learner’s diary as an alert that needs to be dealt with.

Days till refresher training due

This is used should the learning resource to be carried out at regular intervals. This is often the case with compliance training or learning linked to insurance requirements, where regular repetition of the training is required in order to demonstrate a up to date basic level of understanding of the issues involved.

Thumbnail/Promo Images

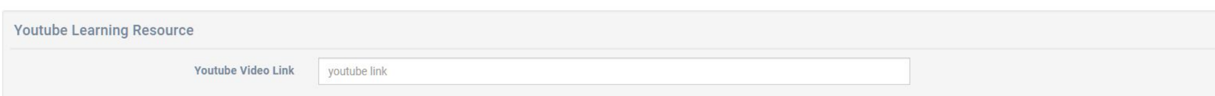
The thumbnail and promo images are used by the learning management system as a pictorial representation of the course. Should there be no available images for these, their places will be filled with suitable defaults for the type of learning resource selected.

Custom Certificate Resources

These fields allow you to customise the certificate for the specific course. By default certificates will contain company branding and the details of the selected course, but these options allow the definition of some additional qualification or images specific to the associated learning resource; stance some courses may carry CPD accreditation and require the CPD accreditation logo along with a message specific to that accreditation body etc.

5.1.1 Add YouTube

YouTube videos can be added as learning resources. The system will track how long each learner access the video for and when it is complete.

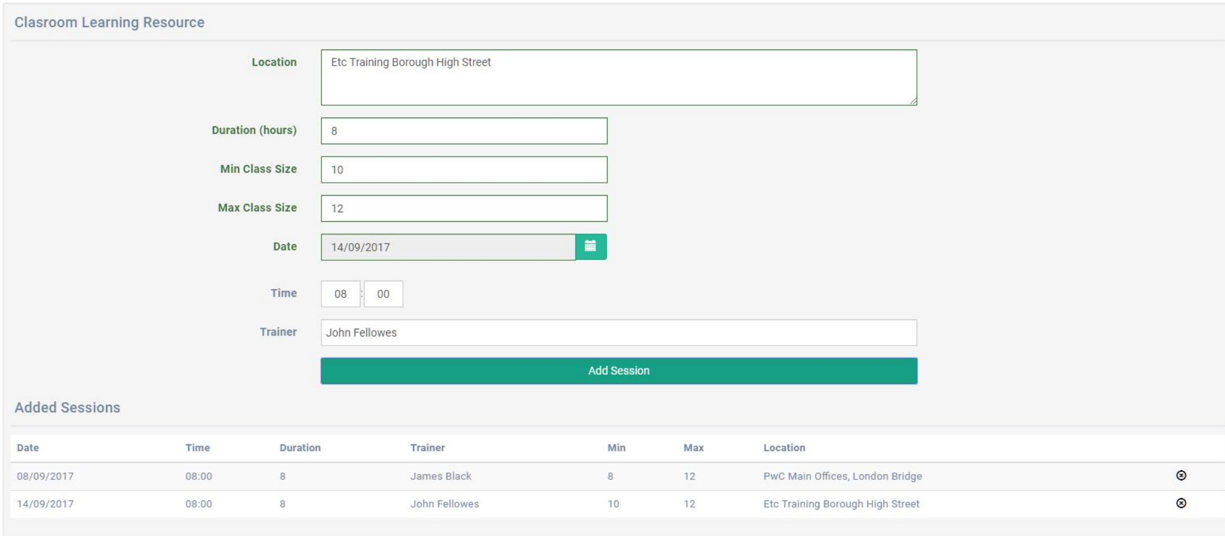


5.1.2 Add Book/CD/DVD

Electronic and online media can be added as learning resources. The time spent on accessing this resource needs to be entered manually.

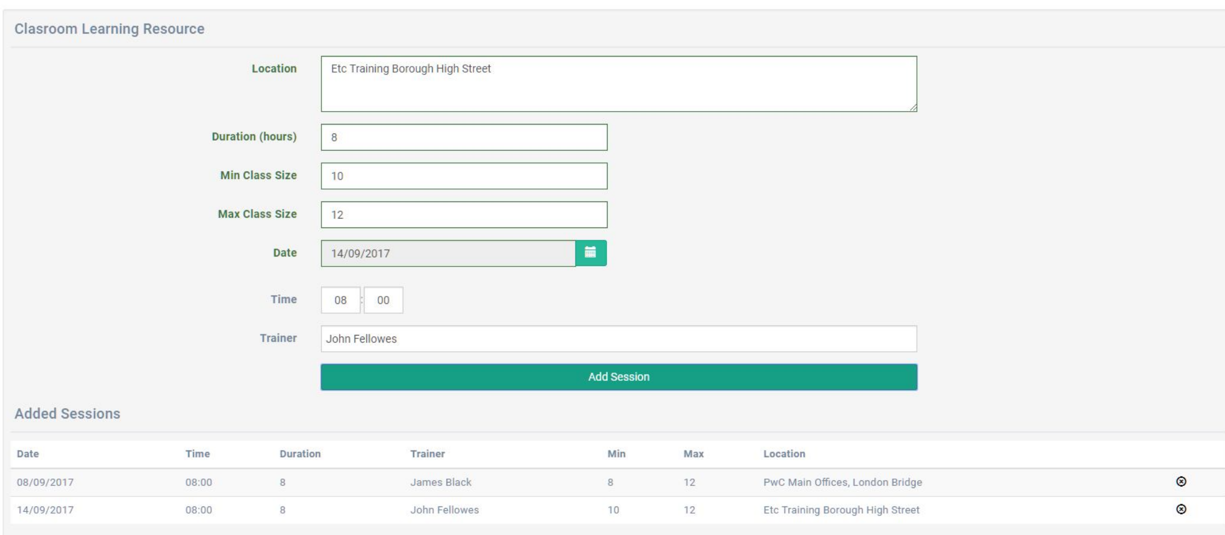
5.1.3 Add Classroom Training

Classroom training sessions can be added as learning resources. The system can add all possible sessions the learners can choose along with parameters such as the minimum class size for it to take place and the maximum class size before it fills. The duration of the training event is recorded in hours.



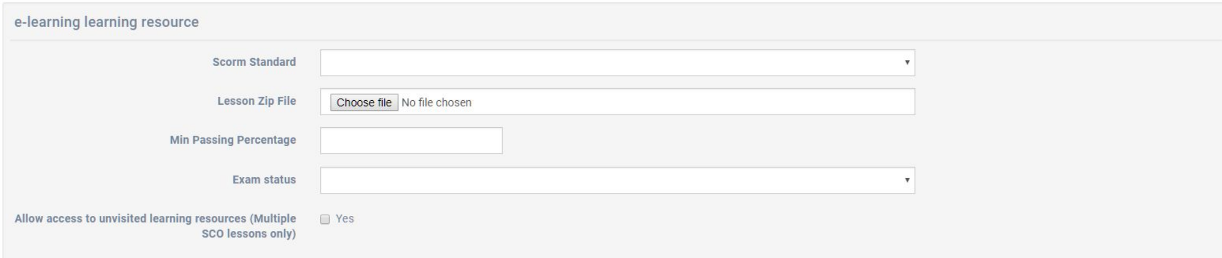
5.1.4 Add On-the-job Training

On-the-job training (assessment or mentoring) is treated similar to classroom style of training in that possible training sessions can be added as learning resources from which the learner can select. The duration of the training event is manually recorded in hours.



5.1.5 Add e-Learning

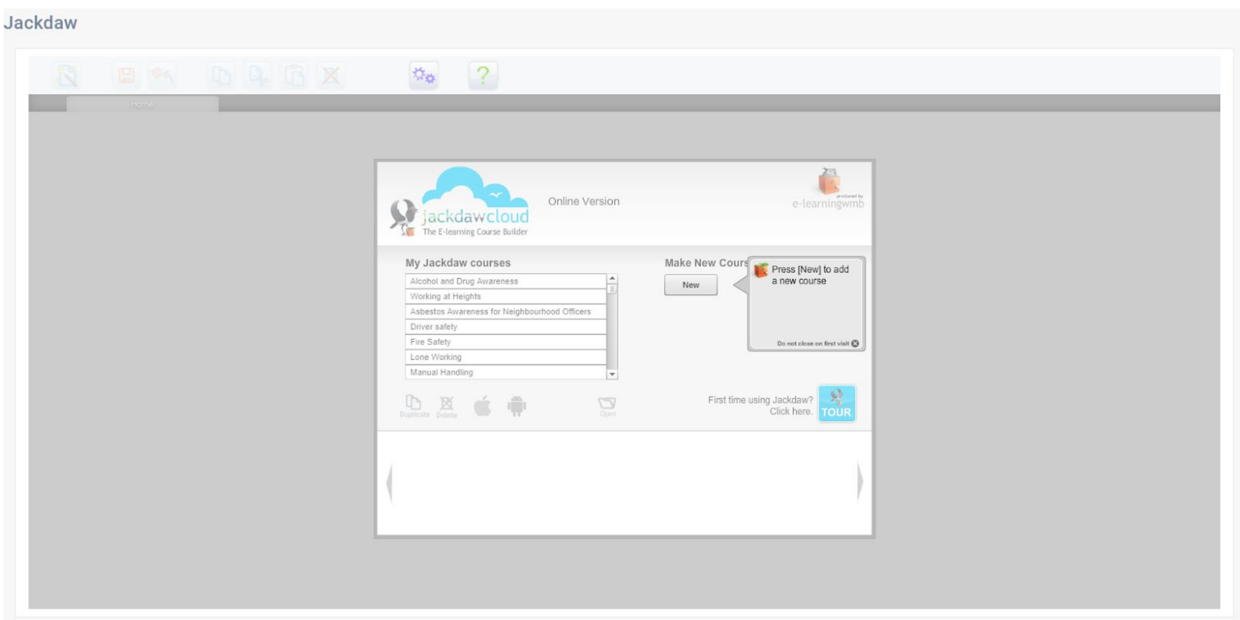
SCORM v1.2 e-learning can be added as learning resources. The system will track how long each learner access the learning for, the score on any quiz and when the time it takes to complete the training.



When adding SCORM compliant courses to the system, make sure the scorm package is supplied as a zip file and contains a SCORM v1.2 Manifest file. For details on how SCORM v1.2 packages are created then refer to https://myelearningworld.com/3-best-ways-to-create-a-scorm-content-package/ (NB most authoring tools will accomplish this automatically.)

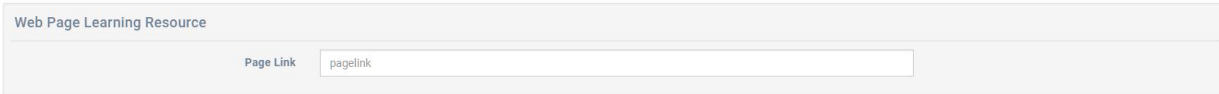
5.1.6 Add e-learning (using Jackdaw Cloud)

E-learning can be entered directly into the system using Jackdaw Cloud (the creation of the SCORM v1.2 files etc is carried out automatically in the background. See later in this manual for a full discussion of how to use Jackdaw Cloud for creating new e-learning.



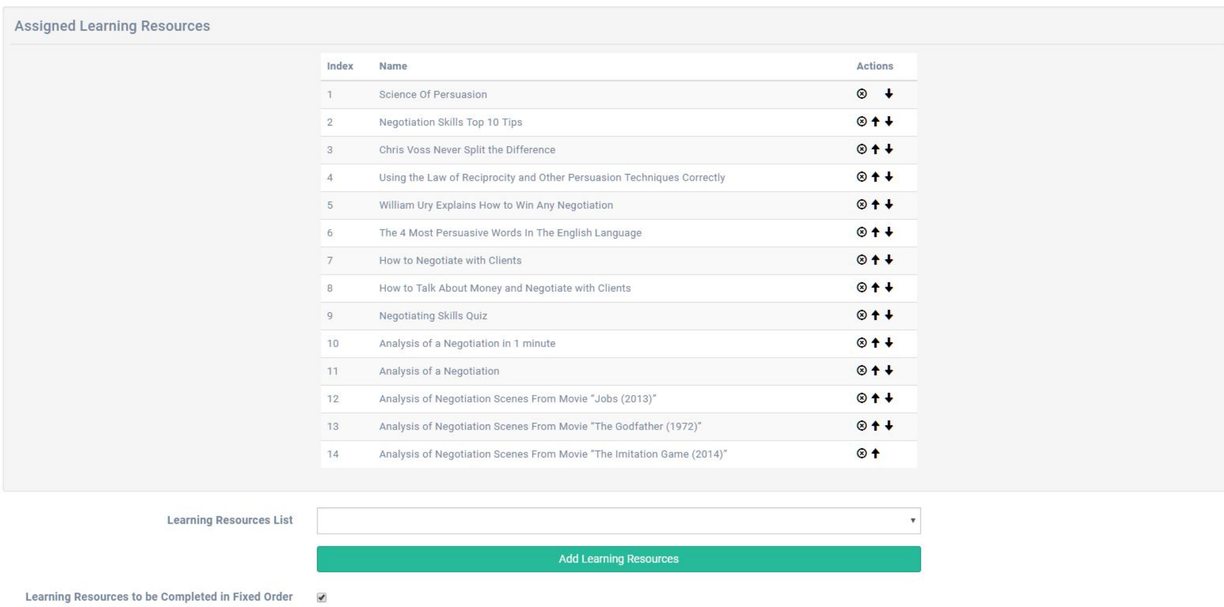
5.1.7 Add Website

An entire website or even a single web page can be linked to Open Elms. The time spent on this learning resource will need to be entered manually.



5.2 Add Lessons

Lessons are effectively a group of learning resources which have been grouped together. The learning resources are selected from those in the system and ordered according to preference. Lessons are added by accessing **Learning and Learning Resources > Lessons > + Add Lesson.**



Learning resources are added to the system and can be ordered according to preference, the learning can also be made to be completed in a fixed order.

5.3 Install Learning Resources from Library

e-Learning WMB is able to provide over **300** learning resources which can be added to Open Elms Pro, including nearly **170** e-learning courses aimed at business users.

If you have the Membership service activated, then you can select from the library of courses available by clicking on the **+ Install Learning Resources from Library** button and select to either **Install** a new course from the library or **Update** an existing course (courses regularly get updated with changes in legislation or due to new designs.)

NB Remember if you wish to edit the course, rename it first, otherwise it will get overwritten when the course is next updated.

5.4 Assign Learning

This process enables you to assign learning in bulk - please note that learning resources can also be assigned to individual learner's e-portfolios via the **Manage Learning** screen.

Courses can be assigned to a selection of employees, departments and groups at the same time. This enables courses to get rolled out effortlessly throughout an organisation. To assign learning resources and lessons to learner accounts in this way, select the learning (s) you want to assign learners to, then scroll down the screen and select from the list of **Departments, Groups** and **Employees** to add the learning to those accounts.

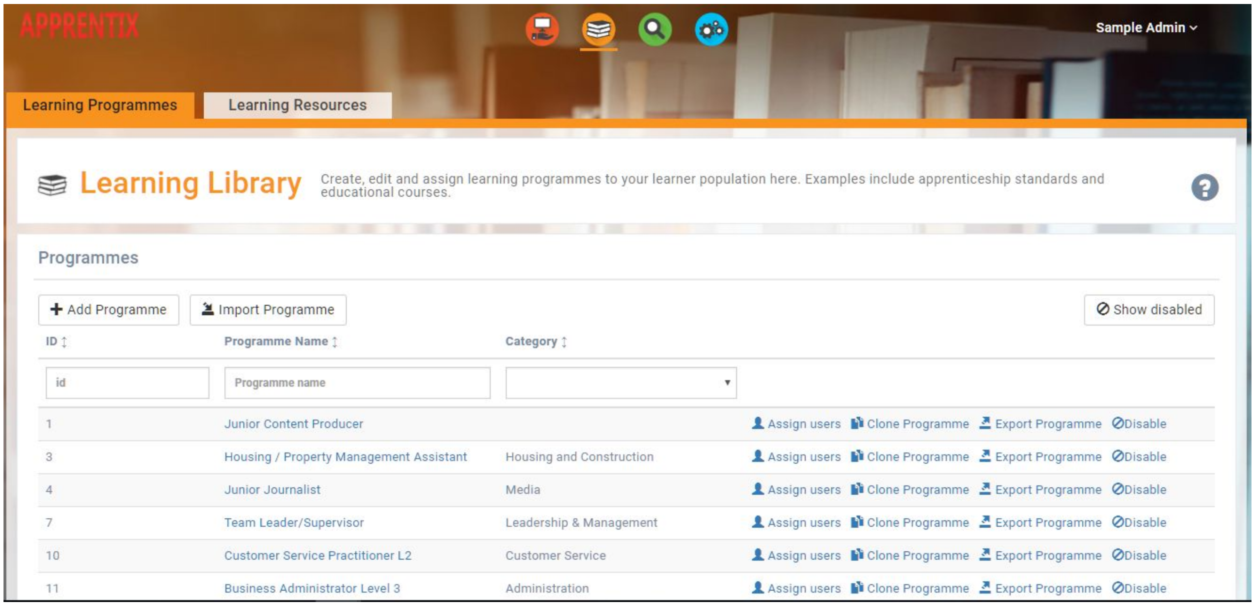
NB: The system should now be set up and ready to start collecting data for the basic Open Elms Pro acting as a Learning Management System. The rest of this section is involved with using the e-Portfolio module (Apprentix) to produce Learning Programmes.

5.5 Learning Programmes

If Apprentix has been purchased, then the learning can also be assigned to learner accounts at the individual level by using Learning Programmes.

Learning programmes are essentially a collection of learning resources that has been mapped to all the skills, knowledge and behaviours needed to meet that programme's learning requirements. There are multiple advantages to using learning programmes in the assigning, tracking and reviewing the data from the learning. If you are in the business of apprenticeships, adult learning, assigning qualifications or any kind of education it is advisable to use Learning Programmes for assigning learning to your population.

In the table is listed the learning programmes available for assigning to learners held within the system.



5.5.1 Add Programme

When adding a learning programme, the following needs to be defined:

- Programme Name and Category
- Expected Completion Time
- Outcomes along with their constituent criteria
- Default Learning

Programme Name and Category
The programme category should be selected from the list and then the programme name added. Once this is added it will be added to the Learning Programmes table where it can be edited further.

Expected Completion Time
Editing the programme allows the definition of the duration time of the programme sets the expected completion date depending upon when the programme was assigned.

Some learning programmes such as apprenticeships have funding requirements dependent upon a strict time window - so it is vital in many cases to strictly adhere to this window for the delivery of the training programme.

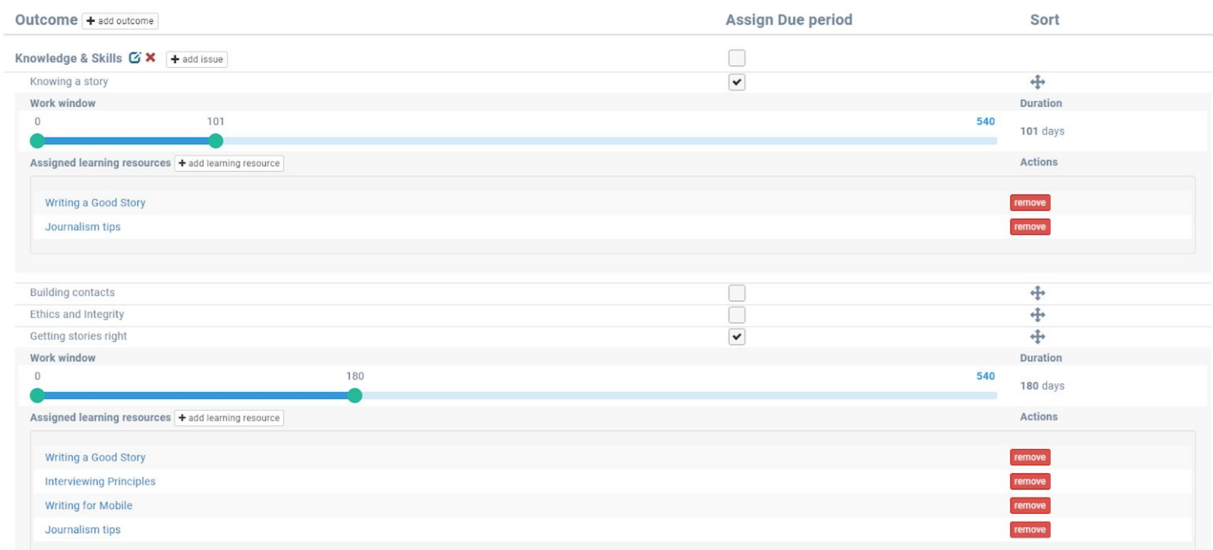
Outcomes along with their constituent criteria
The learning outcomes are listed below the edited programme. Outcomes are added to each programme by pressing the **+ add outcome** button. Criteria are added by pressing the **+add criteria** button, below criteria, **+ sub-criteria** can also be added (useful for apprentice

frameworks).

The whole programme structure of outcomes, criteria and subcriteria under each outcome can be defined by adding and removing from the tree structure. **Edit** and **Delete** buttons appear when the mouse hovers over each of the Outcomes/Criteria.

Default Learning

Default learning resources can be added to each criteria underneath each outcome. Selecting the checkbox in the table allows the mapping of any number of learning resources from the Learning resource library to this criteria.



A learning resource such as the one above - "Journalism Tips" - could apply to a number of the criteria listed. Any learning resource can be mapped to multiple learning criteria - this means that when any learner completes this learning resource, it is tracked against all constituent criteria.

Schedule Learning

Within each programme, the learning needs to be completed at different times but should be spread out evenly over the duration of the programme. The learning can be scheduled in this template and then can be adjusted for individual learners depending upon the abilities of the learners and their availability once the programme is assigned.

To start this scheduling process, click on the checkbox of the issue category you want to schedule as shown above. If learning resources have been added to the category then sliders will be available which will set the work window in which the learning should take place. Should the learner not complete the relevant training inside that learning window, then the learning will become overdue and the associated alerts will be given to the learner and coach/trainer/manager etc.

Repeat this process for all issues within the standard, consider what skills are mission critical for the job and as such which would be moved to early on in the training programme. This process will ensure that learner become productive quickly and as such a greater asset to the company.

5.5.2 Assigning Users

Once the entire program has been set up and all the default learning has been entered then the learning programme can be saved and added to the list of learning programmes on the system.

To roll any of these programmes out to learners, click on the “Assign users” link next to each programme. Here is listed all learners already assigned to the program. Further users can be added by searching on their name or email address. Once located, the learner is selected and they are then automatically assigned to the learning programme.

5.5.3 Export and Import

Learning programmes can be Exported and Imported from e-Learning WMB and other users of the system. These can be imported directly into the system by selecting the [**Import Programme**] button.

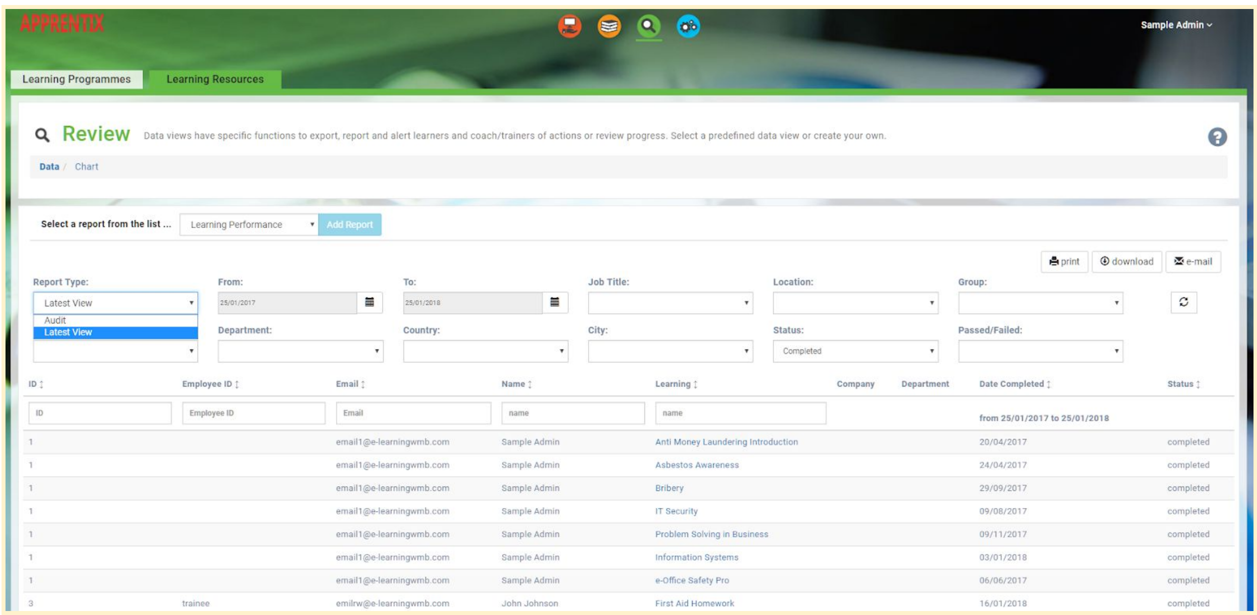
5.5.4 Clone Programme

Also you may want to form a new programme based on many features found in an existing one. You can clone programmes and start defining the programme based on the existing content.

6 Review

The review section is primarily where the learning data is reviewed from Learning Resources and their composite Learning Programmes. This is a separate process because the requirements surrounding resources and programmes are uniquely different. There is also a lot of statutory requirements surrounding the reviewing of apprenticeship programmes which need highly specialised reporting and exporting systems.

Yet the functionality for producing both is almost identical so the process will described together.



Reviewing learning resources is a matter of selecting the appropriate view from the top of the screen else adding a customised view. There are two ways of creating views by selecting a:

- Predefined View
- Add View

6.1 Predefined View

There is a series of predefined views Each view has a unique set of fields you can filter to define the view's contents.

6.1.1 Learning Resources Review

Feedback

This view shows user feedback from each Learning Resource.

Filter by the appropriate course to view feedback on each. This feedback is qualitative and gives you evidence for courses which need alterations made to them.

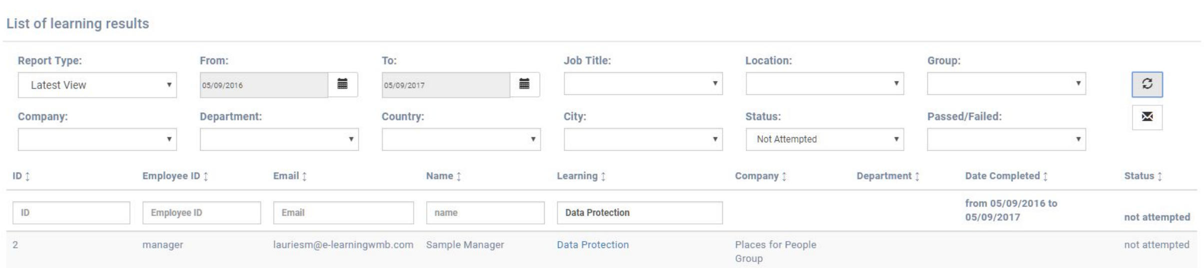
Learning Performance

The Learning Performance view enables a manager to review the latest data recorded for each learning resource or in the case of the “Audit” view type, all previous incidences of data are recorded. There may be multiple records against a learning resource when regular refresher training is carried out on the same course.

By default the view displays all learners who have completed the learning, but you can change this view to assist with managing the entire learning process.

For instance type the name of the learning in the "Learning" column and select the "Status" of "Not Attempted" (don’t forget to press the refresh button).

You can then send an email to all these people to hurry them to start training.

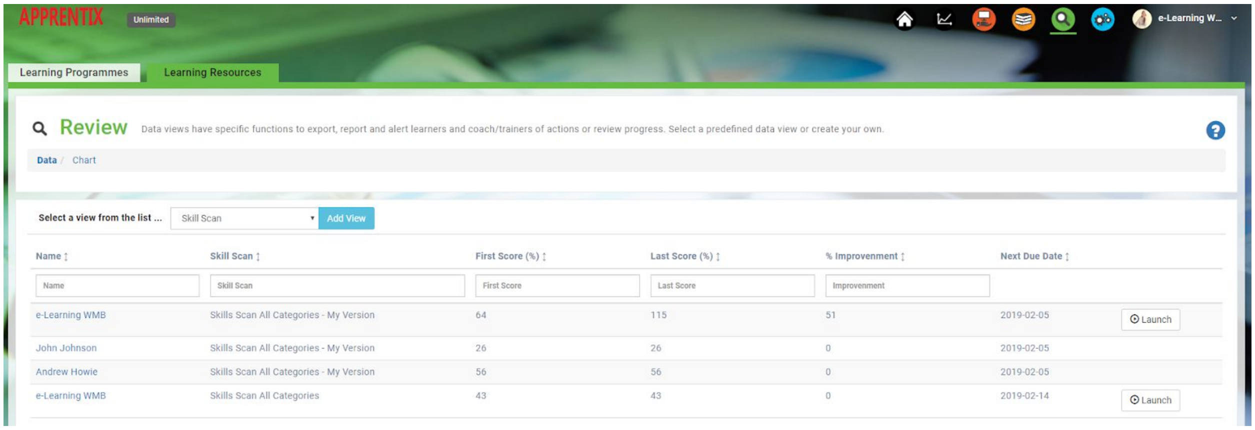


If you wish to check the performance on refresher training (where the training would be completed periodically) - select the "View Type" option on the filter and choose "Audit". If refresher training has been carried out, you will see more than one record for each learner.

Further analysis of the data can be carried out by exporting the filter using the "Download all data" button at the bottom of the screen.

Skill Scan

A skill scan is a special type of e-learning course which is a survey of each learner’s underlying skills which is ran periodically (usually every 3 months.)   The scan shows how the underlying skills knowledge and behaviour improves over time (see below for an example of the percentage Improvement over time).



Note that these skill scans can be ran either from the management or trainee interface.

Task Assessment views

The task assessment view contains information from any task related questions within e-learning programs. An example course is e-Office Safety where you learner is asked questions about their workstation. If they request a new seat then a "New Seat" task is recorded here. This functionality can be used to attach task related questions to any e-Learning course or lesson.

Looking at the "view Type" > "Outstanding Tasks" filter - this show tasks that require attention (where the "Status" is equal to either "In Progress" or "Not Started".) This view of the data is used to manage the assessment process - the idea is to clean this screen of any outstanding tasks by resolving the issues or passing them on to someone more suitable.

"View Type" > "Latest View" shows a summary of all task assessments that have not been signed off by the Coach/Trainer. This view can be used to resolve an assessment without resolving every task in the assessment - check the box at the end grid for any assessment whose status has been Submitted.

"View Type" > "Audit" is similar to the "Latest View" but instead it lists all task assessments, including those that have previously been refreshed and require re-testing. Use this view to evidence long term compliance.

Training Impact

This view shows how employee competency has improved over time.

Set the "Training Start Date" and "Training End Date" to display the period to assess. The performance across these two time periods is then assessed. The performance can be assessed as CPD Points or Competency Passes.

Before using this view, it is necessary to ensure all training resources have an associated competency scoring system linked to them.

Further analysis of the data can be carried out by exporting the filter using the "Download all data" button at the bottom of the screen.

Training Schedule

The training schedule view shows training resources that are due either within the next 90 days or within a time window.

Use this schedule to examine the progress of your learners and managing them through the learning process.

Further analysis of the data can be carried out by exporting the filter using the "Download all data" button at the bottom of the screen.

6.1.2 Learning Programme Review

Apprentice Progress ATM

This view shows all programmes whose End Date is in the past, I.e. only programmes which should have been completed by the "**To:**" date field. This means that the view will not display data for the first 12-18 months of using the system.

Use this view to measure the performance of your learners to see how many are completing the programmes on time.

Coach/Assessor Progress ATM

This is as above but looks at the performance of the coaches/assessors in progressing programs through to completion.

Apprentice Falling Behinds

This view displays learners who have learning programmes currently in progress which are currently behind where they should be by more than 10%. This enables coaches, trainers and assessors to focus on learners who are not keeping up with their programme.

Coach/Assessor Falling Behinds

Similar to the previous view but focuses on the coaches and assessors and determines which are behind schedule.

Apprentice Training Impact

This view shows performance over time measured by the % of programmes completed. The time window measured can be altered by editing the **Start Review** and **End Review** dates.

Training Impact

Similar to the Apprentice Training Impact report, but this displays performance by the coach or assessor.

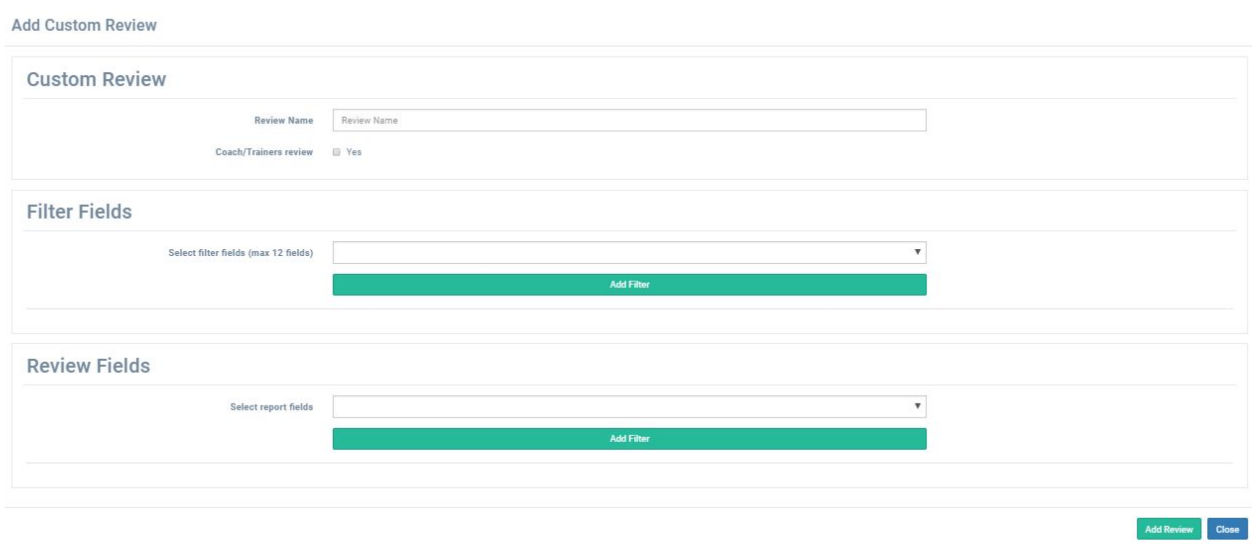
The data can be printed off as a report, downloaded to a spreadsheet for use as a mail merge or (as with the home screen) emailed directly from the program. Remember any email - once defined - can be saved to be sent out automatically at regular intervals if a frequency for resending the email is defined. Anyone matching the selected criteria will then automatically be sent this mail - in this case every week.

6.2 Add view

As with the predefined views, the data that matches the criteria is listed in the table below the filter.

These filter fields can be selected from a list of Individualised Learning Record (or ILR) fields covering a variety of information including location, education, funding and a host of other parameters.

Similarly the fields which appear in the view can also be selected from the range of ILR fields.



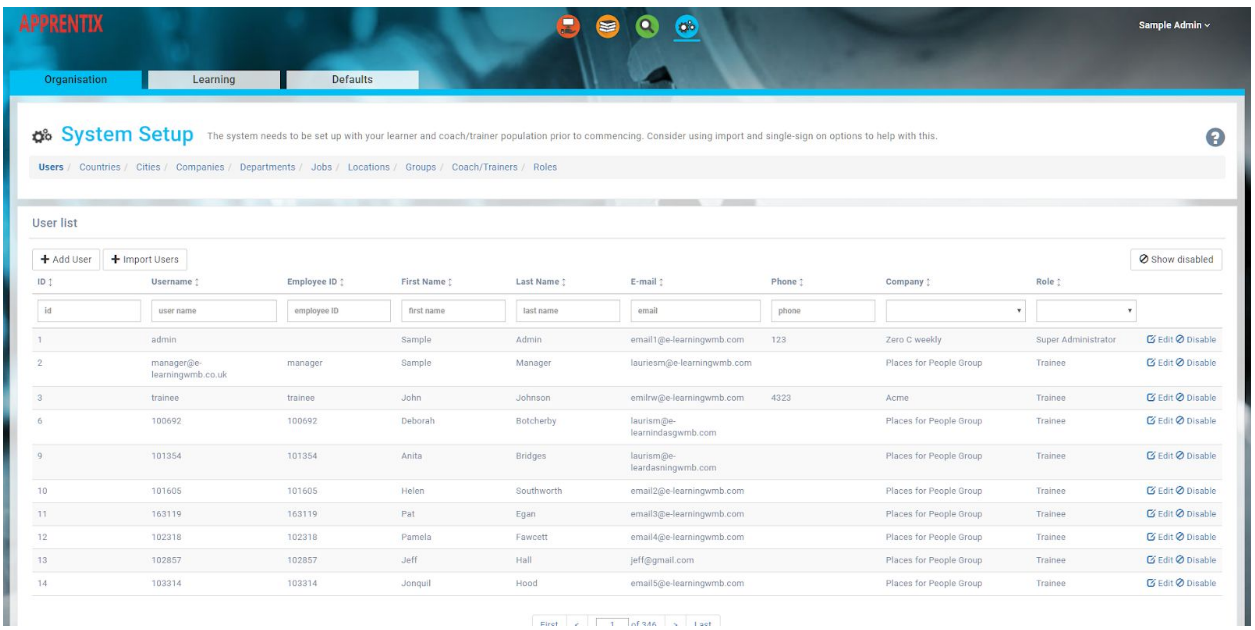
The process of running the views is the same as for the Custom Views.

7 System Setup

Since no two clients have the same requirements (different personnel, different courses, organisational structures etc.), Open Elms needs to be set up differently for each client. This manual will proceed through the setup process necessary prior to using the system.

7.1 Organisation

Your institution’s physical and organisational structure are defined in this section along with the permissions given to employees which allow them to access certain aspects of the system.



7.1.1 Users

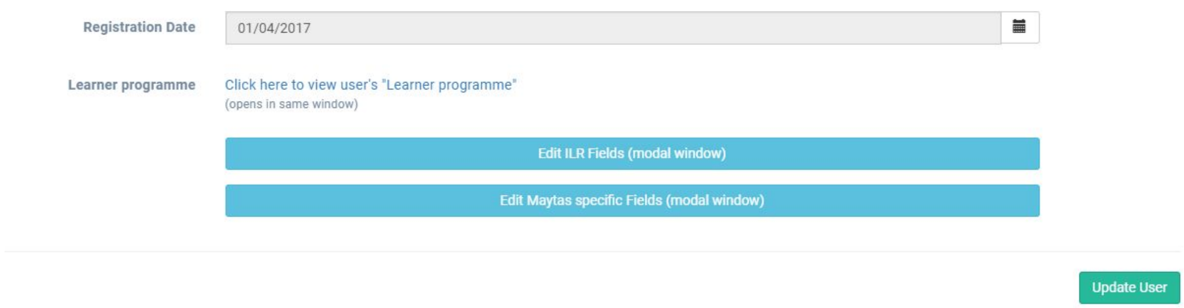
Users of the system are entered in this section - accessed via the **Users** link at the top of the screen. This could be learners, managers, coaches, trainers, administrators and validators.

Adding learners allows you to define the user and at the same time all the basic organizational information which define a learner. The database can be populated using one or a combination of the following methods:

Option 1: Add New Users

Users can be added to the system one at a time by selecting the [+Add User] button.

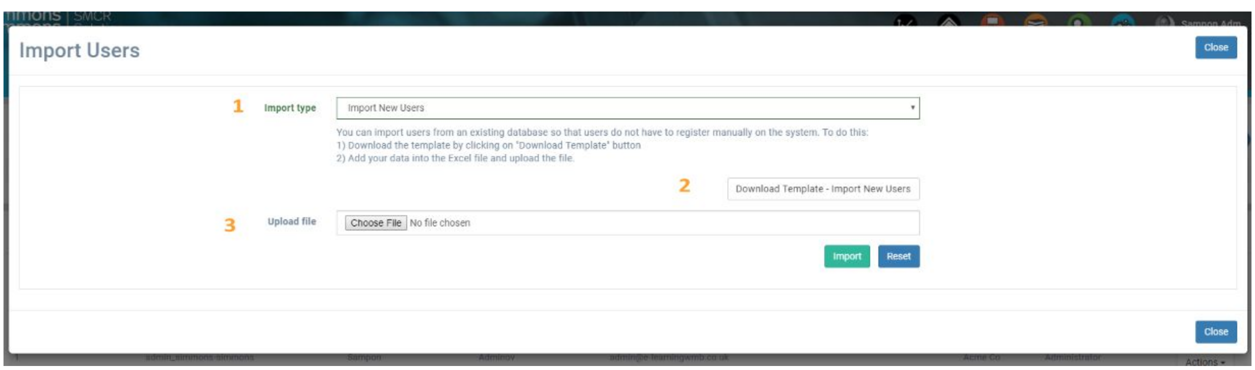
The form contains basic user data - if completing the learner records by entering the data manually, it is important to make sure the company structure (sites, roles, departments, company names etc.) are entered first so that they can be selected from the dropdown list boxes. Note that the **role** field for standard learners should given the “Trainee” role (or a variant of that) - this lets the learner access the training but not the “back-end” data management functionality.



More detailed information can be entered by clicking on the **Edit ILR Fields** button. The Individualised Learner Record (ILR) is a data standard that publicly funded colleges, training organisations, local authorities and employers must collect and return in order to draw down funding. This information is usually imported in directly from an ILR XML import file, else it can be entered and updated using this interface.

Option 2: Import Users

Select the **+ Import Users** option to import a set of users from a company database etc.   You will then see the following screen...



Step 1: Import Type

You then have the option of choosing one of the following types of import. If you are importing users for the first time (and not dealing with the UK Government’s apprenticeship scheme) select the first option below “**Import New Users**” (sometimes called “**Import Apprentices**” or “**Import Individuals**” depending upon the system version):

- *** Import New Users**
- Import ILR Users (import from the Individualised Learner Record standard XML file)

- Import “Maytas” Users (importing from the Maytas/eTrack software data structure
- Import Disable List (anyone on list in the current database is archived)
- Import Exclusive Disable List (anyone not on list in the current database is archived)

Step 2: Enter Information into Spreadsheet

Download the import template. Making the assumption that the “Import New Users” option has been selected, the following fields can be imported. Below is a description of each field, example data and an indication whether the field is mandatory.

Field	**Example Data**	**Description**	**Mandatory**
First Name	Joe	User’s first name(s)	*
Last Name	Bloggs	Second name(s)	*
Company	Acme	Company of the person (usually the licensee company - although can change for group companies, divisions etc.	
Department	Marketing	Department field is important as is a way of assigning learning resources to multiple learners, or managers to multiple learners.	
Designation	Marketing Manager	This links to the Job field in the system. Jobs can be linked to pre-assigned training.	
Location	London Bridge	This can be any field to describe the geographical location of the individual.	
Role	Trainee	This entry depends on the version of the system being used. If in any doubt check the name of the roles used in your system. “Learner” if Open Ekms “Trainee” if Apprentix “Individual” if SMCR Solution	*
Country	UK	The country where the learner is located.	
City	London	The city or town where the learner is located.	
Email	jb@acme.com		*

Phone	0207 123 4567		
User Name	jb@acme.com	Most clients use the learner's email for this as it is easily remembered and unique. This is used to log into the system.	*
Description	Joe works for Acme in marketing	Can be any description of the learner.	
Group Name	Marketing and Sales	Groups can be used for handling multiple learning resources (e.g. assign a "Marketing and Sales" a course will propagate the course to all members of the group.	
Password		Ideally leave this blank and - if a manual login is required - ask learners to press the forgotten password link to log in.	
ULN	12345678	This is generally used for monitoring apprentices and in higher education academic institutions.	
Managers	ab@acme.com, st@acme.com, cd@acme.com	This is a list of managers assigned to each user (this allows those managers to see their data.) These are usernames which must be separated by commas. Note - all managers with a suitable role must be defined within the system first prior to importing this link.	

N.B. It is important that you include as much data as possible in the import templates as this will populate the database with all the companies, countries, cities, departments, groups etc. Before completing this process take time to consider how you want to segment your data and what would be useful for you to filter when reporting. If there is not a like for like match with any category then you can substitute a field that is by default in Open Elms Pro (e.g. "Location") with a field which is utilised in your organisation (e.g. "Cost Center") - fields labels can be renamed (more of this later.)

Step 3: Import Data

Upload the completed spreadsheet to the server. This will import all users to the system. From this base data, managers can be defined, jobs described (with any jobs added) and any further information can be added.

Option 3: Register Users

Users can self-register onto the system using a registration page. This page will be set up by e-Learning WMB to match your learner input enquiries. Contact e-Learning WMB if you require users to register themselves on the system - beware this is usually not recommended due to user error on data entry.

Option 4: Single Sign On (SSO)

e-Learning WMB offer this option to enable learners to click a link to directly log into the Open Elms Pro system (users need to be logged into their company's own intranet etc first.)

To activate single sign-on there are two choices:

Token SSO vs SAML SSO e.g. Google

Instructions on how to do this are available in Appendix 1; this is a technical task and will need the cooperation of your IT department. By default the SSO procedure is not enabled.

Option 5: Application programming interface (API)

Open Elms Pro comes with its own API which allows other systems to use a set of functions from within Open Elms Pro to edit and read data inside the Open Elms Pro system from a third party application. This can include the addition of new users onto the system.

Details on how to use the API are available in Appendix 2; again this is a technical task which requires the customisation of third-party software.

7.1.2 Adding Companies

There may be situations where it is preferable to split the hosted data into a number of companies; examples include large group companies which operate as unique entities or a reseller organisation hosting other company data.

Arranging data into separate companies has two advantages:

1) Data can be discrete hosted for each company, management access can be restricted at the company level.
2) Branding can be applied to each company at the login page.

To add a new company go to **Organization Setup > Companies > + Add Company** and enter company details. If each company requires its own branding on the welcome page, then edit the Welcome Message, Logo and Url Extension.

Access can be restricted from company to company by logging in as Coach/Trainers with the “Manager” and “Manager - Admin” profile. This profile by default has the “Access to all companies” checkbox switched off.

7.1.3 Adding Other Organization Information

Additional organisational information can be added (**Countries, Cities, Companies, Departments, Jobs** and **Groups**.) Note that these fields’ labels can be customised by the user to match their own organisation’s labels - see the **System Setup > Defaults > Labels** option to see how this is done.

7.1.4 Coach/Trainers

A feature of Open Elms Pro is that it has been designed to work in accordance with a business’ needs. Coaches, trainers or managers can be assigned employees whose details they will gain access to exclusively.

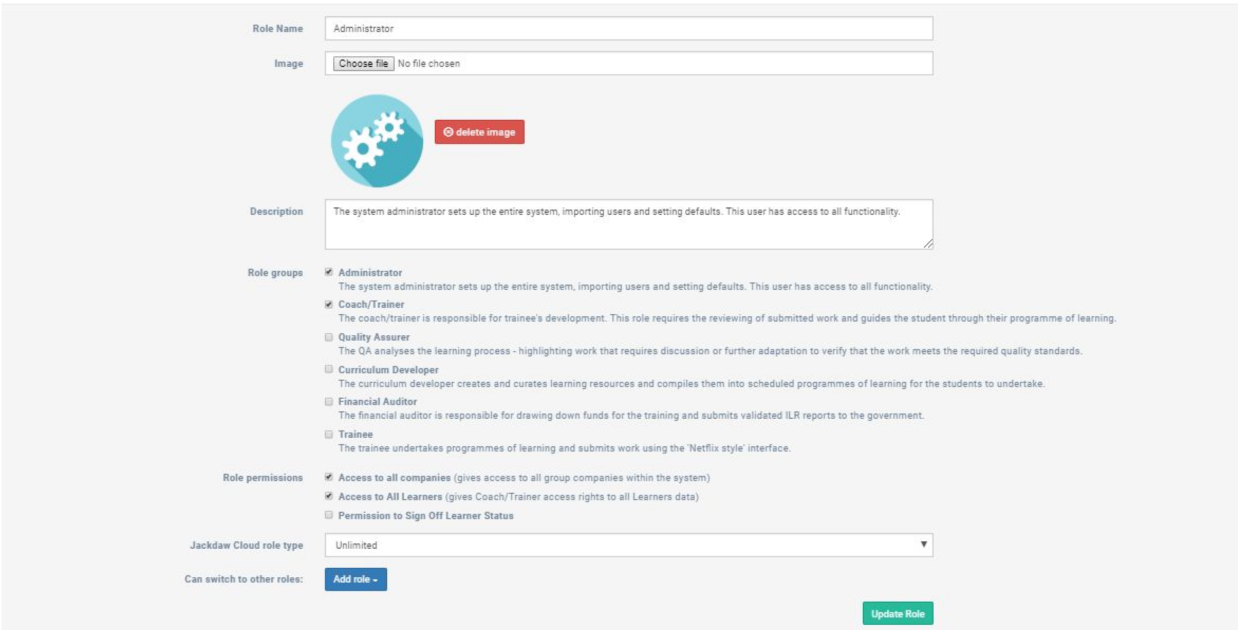
To set up a new coach/trainer find the employee you want to give “Coach/Trainer” status to. Note that only users set up with the following default Roles will be included in this list:

- Manager
- Manager - Admin
- Super Administrator

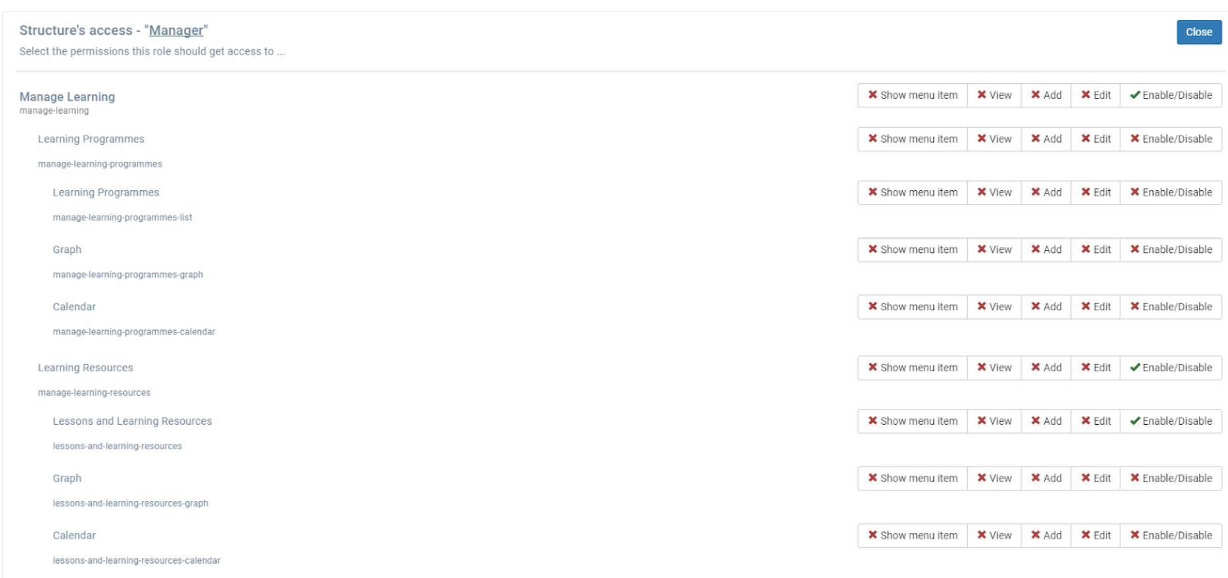
To add Learners to each Coach/Trainer’s account, select the **Edit** link. On this screen you can assign departments, employees and lessons or learning resources to that Coach Manager. This means that the manager will see the data from learner in the selected department(s), any learners directly assigned to them and any learners who have carried out training on the selected learning resource or lesson.

7.1.5 Roles

Roles should be considered as “types” of system users, for instance: learners, coach/trainers, administrators, super administrators etc. The type of role is defined by selecting the **Edit** button in the top right of the screen and allows the administrator to combine any number of roles into a single user account (for instance a Super Administrator can also be a Coach/Trainer or Financial Auditor etc.)



These roles contain all the permissions which restrict and enable what they can and can't do in the system.

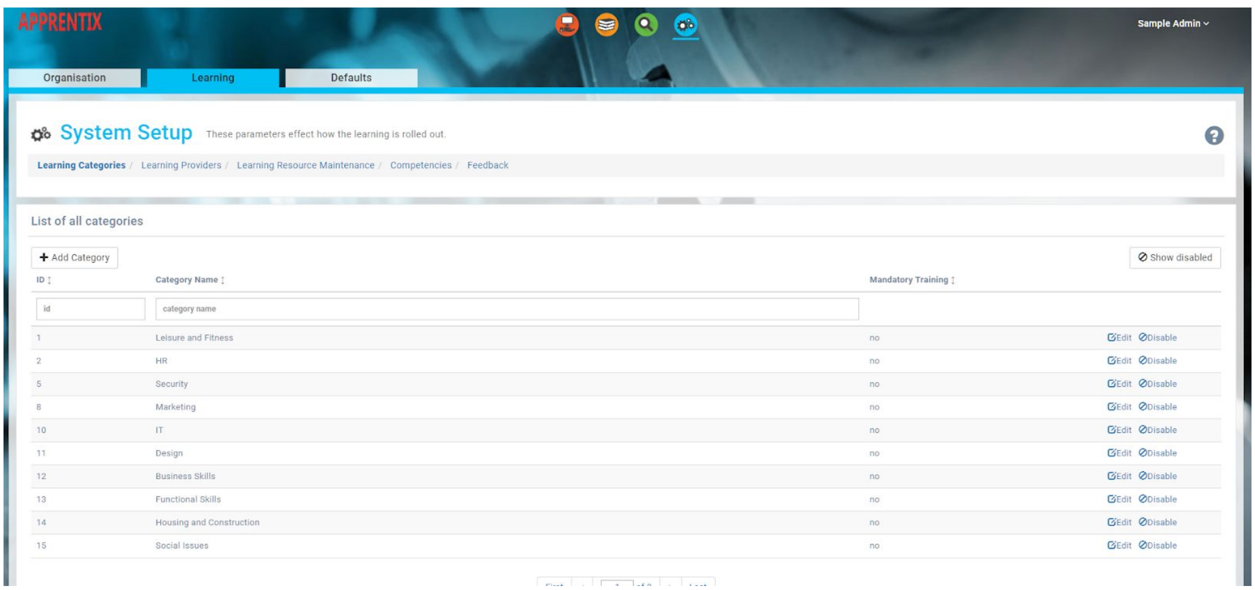


The **Page Access** link displays the permissions page above; here is listed the access permissions for each menu item in the admin interface. We can control what the user can do from seeing the menu link, viewing the data, adding and editing data.

New roles can be created with new permission levels or existing roles can be customised accordingly.

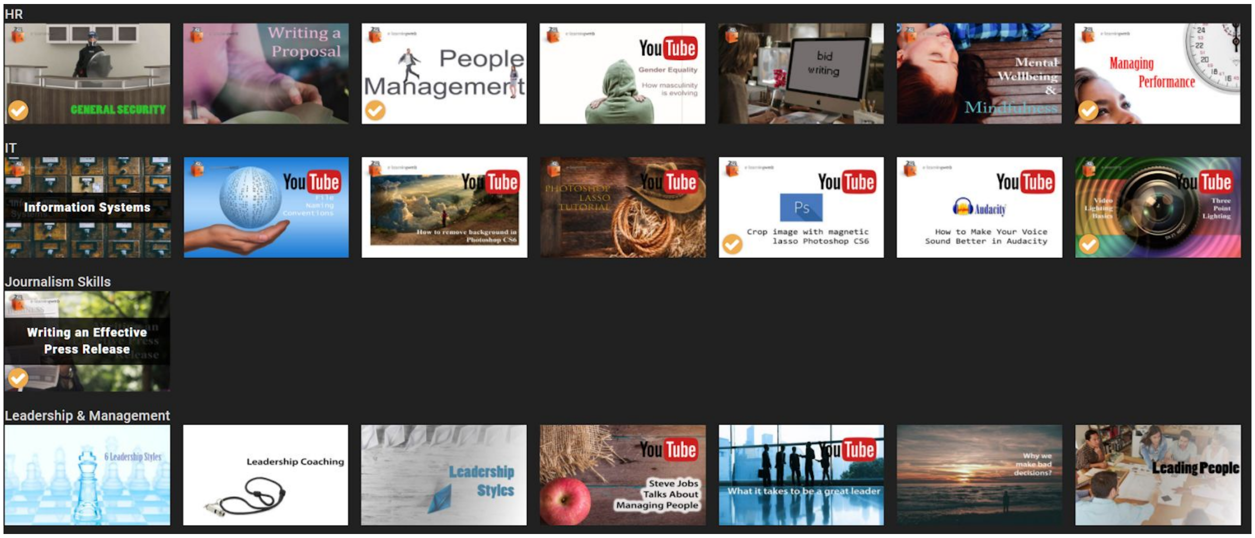
7.2 Learning

This section of the system allows enables the setting up of properties that affect how the learning library is processed and presented to the learner. These include categories and providers used to describe each learning resource and programme, learning resource maintenance tasks to manage underlying file updates from suppliers and competencies which can be linked to learning resources with CPD learning points.



7.2.1 Learning Categories

Learning categories are used to group Learning Resources in the trainee’s interface.



It is important not to have too many categories since this will result in sparsely populated categories in some incidences as shown above.

7.2.2 Learning Providers

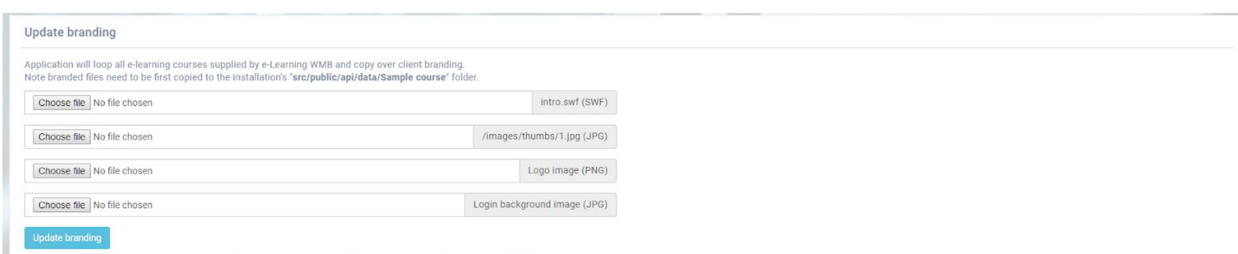
Learning Providers information can be used when printing reports to segment data and assign costings by supplier.

7.2.3 Learning Resource Maintenance

There are 4 options which can update features in the program.

Update branding

Application will loop all e-learning courses supplied by e-Learning WMB and copy over client branding.



Note the upload files should be saved at 70dpi with a recommended size of:

File	Size	Resolution
1.jpg (navigation thumbnail	400 x 242	70 dpi

on e-learning courses)		
Logo Image	700 x 180	70 dpi
Login background image	1840 x 1232	70 dpi

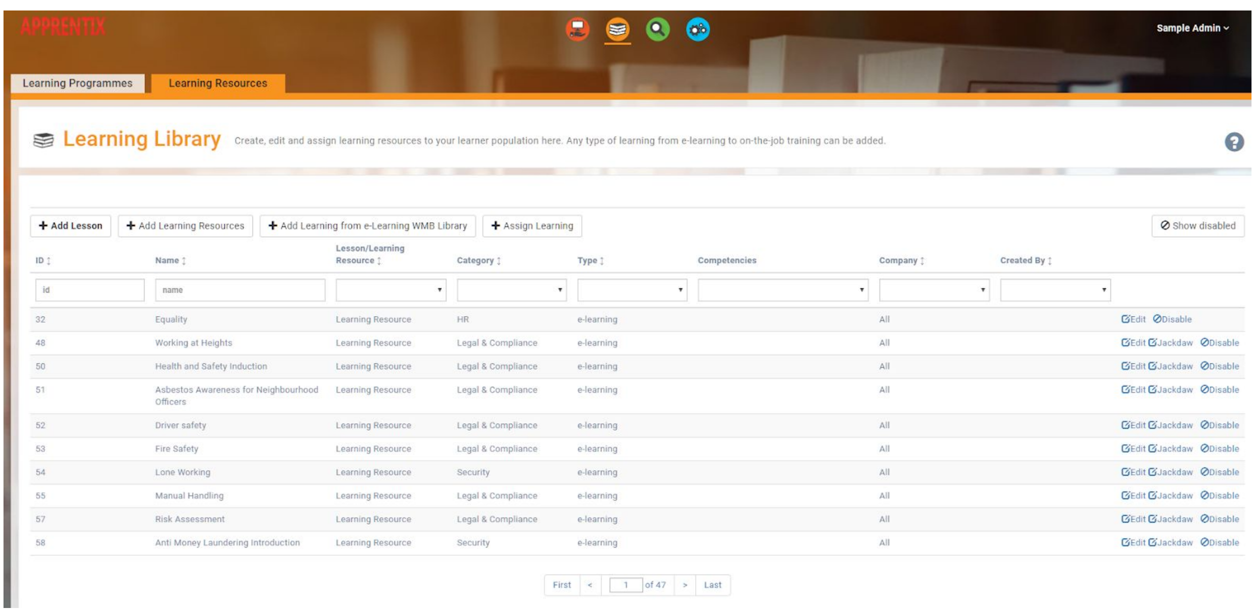
Intro.swf is the introduction animation at the start of e-learning courses, contact e-Learning WMB for details on how this is edited.

Update e-Learning engine

The underlying e-learning engine is from time to time updated to allow new features during the presentation phase as well as extra editing options in Jackdaw Cloud. This will not change the course content.

e-Learning WMB will usually run this process on behalf of a client when a change is needed. Contact e-learning WMB if an update file is required.

Run E-learning type check for all modules to determine Jackdaw compatibility
This option is necessary if any courses supplied by e-Learning WMB do not have a Jackdaw link next to them so that they can be edited online (an example is shown below in the first record on the Learning Library > Learning Resources page - as shown below).



This happens when files get out of date or the course is copied over from another location which used a previous version of Jackdaw Cloud.

Update learning resource Images
Clicking in the Update/Replace Images will update the thumbnail images used in the interface with the latest default ones used by the system.

Update Progress data
Some reporting data is calculated every day by backend server-side processes - usually late at night. In order to review the very latest summary data press the **Update** button to run these calculations immediately.

7.2.4 Competencies

Competencies can be aligned to CPD - or similar - points enabling administrators to assign points or credits to **achieve** certain competencies.

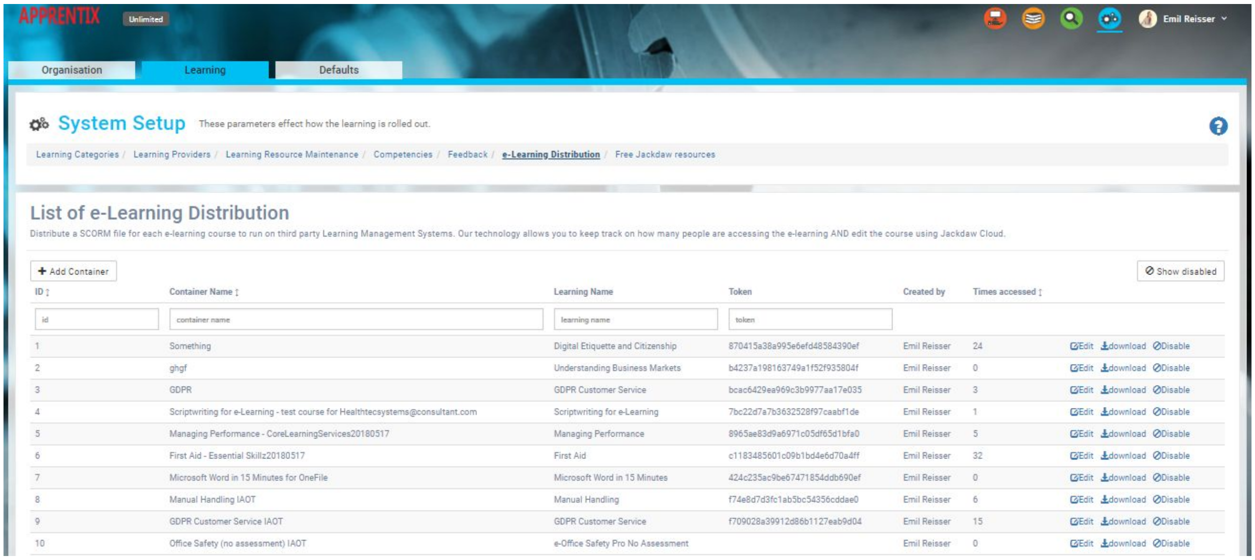
Elsewhere points or credits can then be assigned to learning resources - so on completion of the learning resources they get credit towards achieving each competency. This is not a mandatory feature of the system and is in many ways superseded by the tracking embedded within the Learning Programmes' features - this does however give you another method of tracking how learning is contributing to the underlying knowledge and skills of the learner population.

7.2.5 Feedback

This is information received about learning resources from users of the system. Review courses regularly with this information in mind.

7.2.6 e-Learning Distribution (Jackdaw Cloud Only)

e-Learning can be downloaded and placed on third-party Learning Management Systems. To do this with any existing Jackdaw Cloud course, select the **+ Add Container** button and then **download** the course. The course is packaged as a SCORM v1.2 package which can be imported into any SCORM Learning Management System which follows this standard.

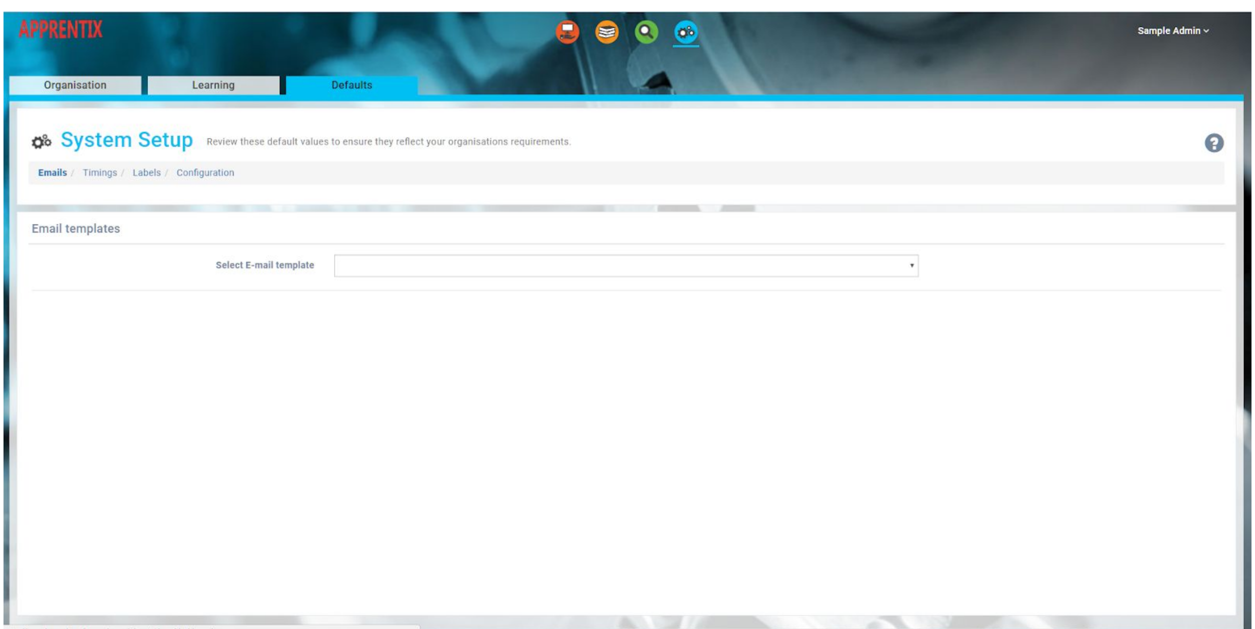


7.2.7 Free Jackdaw Resources (Jackdaw Cloud Only)

These resources are freely available for customisation with the Jackdaw Cloud system. Any can be disabled by selecting the **Disable** link.

7.3 Defaults

Default values used by the system are configured in this tab - this includes emails, timings, labels used in the system (for defining the organisational structure etc.) and custom variables which affect the system's behaviour.



7.3.1 Emails

Default emails which are used by the system for a variety of tasks such as notifying learners that a learning resource they have booked onto has been approved or a forgotten password has been sent etc.

Each email can be edited and formatted using the controls on the toolbar. The email content contains variable values surrounded by two percentage signs. So for instance "%%USER_FNAME%%" displays the user's first name, "%%REGARDS%%" displays the email sign off etc.

Such variables can be selected from the drop down list box on the email's toolbar. A full ist is displayed below:

- %USER.FNAME% - learner last name
- %USER.LNAME% - learner last name
- %%EMPLOYEE_USERNAME%% - learner
- %%EMPLOYEE_FNAME%% - learner first name
- %%EMPLOYEE_LNAME%% - learner last name
- %%EMPLOYEE_EMAIL%% - learner email
- %%LEARNING_ID%% - reference ID for learning resources or lesson
- %%ASSESSMENT_DATE%% - date of your assessment (task assessments only)
- %%LMS_NAME%% - the name you use internally to reference Open Elms
- %%SESSION_LOCATION%% - location of classroom or on the job training
- %%SESSION_DATE%% - date of classroom or on the job training
- %%SESSION_TRAINER%% - trainer for classroom or on the job training
- %%LMS_LINK%% - the link to Open ELms
- %%LEARNING_NAME%% - name of learning resource to which the email applies
- %%REGARDS%% - your name

User generated emails - i.e. not ones supplied by default with the system - can sent out periodically to the user population - the frequency by which they are sent can be customised by editing the **Next send out date**. The email is sent to anyone matching the search criteria which this email was initially sent to. For instance if a query is created to send an email to all new users of the system who had yet to start a certain course, then anyone who had not started the course would automatically be sent the email at that time interval. Any email query can be deleted using the red **Delete Template** button at the bottom of the form.

7.3.2 Timings

The timings determine the time by which things simple happen in the system.

Different types of learning resources can become "due" at different times after they have been assigned. These due times are important since they affect the timing of when they are to appear in reports and pop up as events in a user's calendar.

A number of additional time related restrictions and delays are also be defined here.

7.3.3 Labels

Words used in the system can be defined differently for each installation.

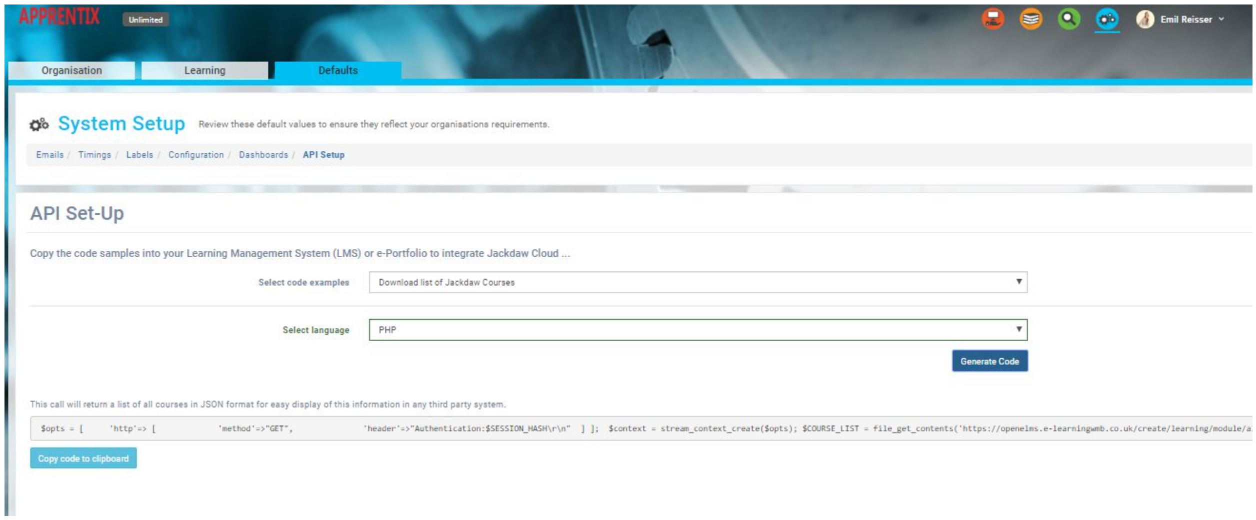
For instance should you wish to use the word “email” hyphenated in your organisation, a translation can be set up so whenever the work “email” is detected, then there is always have a translation of “e-mail” that is used in its stead. This is especially useful where you want to use different terminology from that used by the system (e.g. “cost centre” can be used instead “group”, “division” instead of “company” etc.)

7.3.4 Configuration

The configuration option enables the editing of configuration variables used by the system - largely affecting the user experience prior to the learner first logging in. For instance here is set whether learners can self register on the system, the default role (along with the appropriate permissions) for a registered user, activating APIs etc.

7.3.5 API Setup

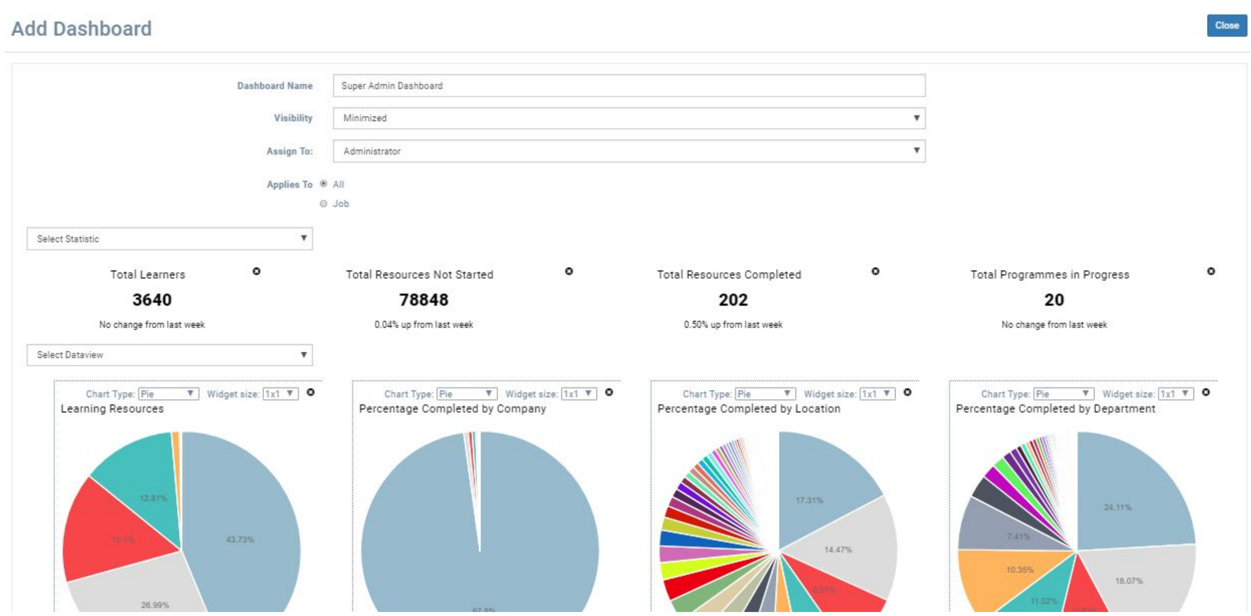
The API (Application Programming Interface) is a set of functions and procedures that allow the creation of applications which access the features or data of an operating system, application, or other service. To view this option make sure the “allowApi” configuration key is set to true.



Selecting the function and coding language allows the IT administrator to add code to an existing application which can either read from the system or send commands to it. Selecting the commands and copying the code in the correct language enables this to happen.

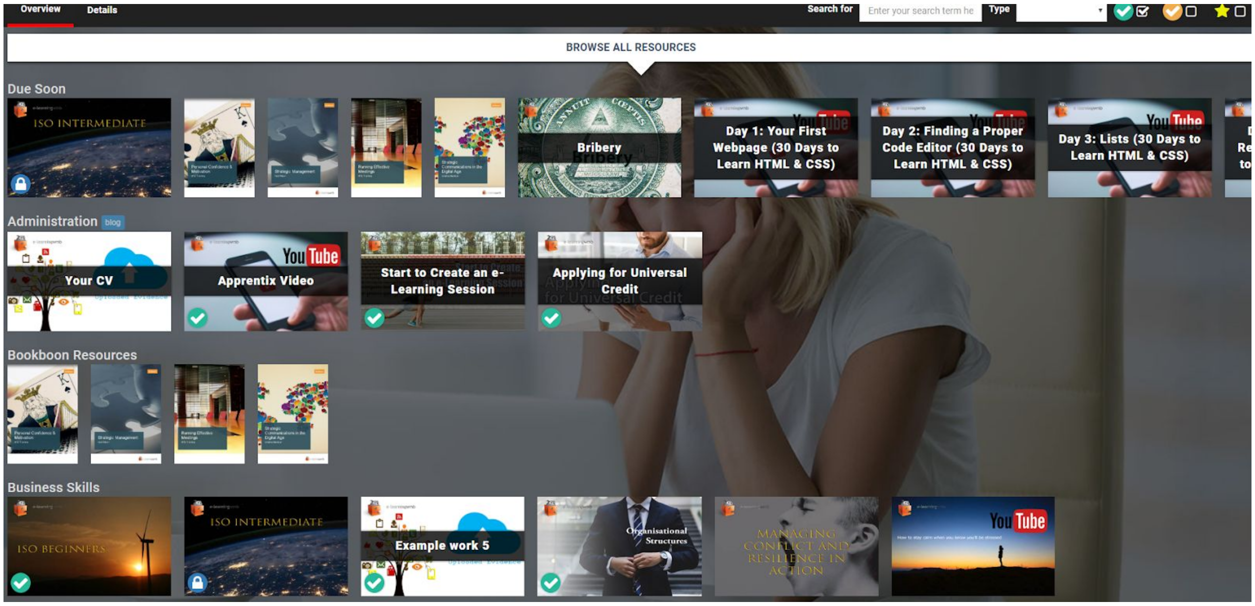
7.3.6 Dashboards

This data view appears when the user first logs in. The statistics and graphs displayed to each role type are defined and paid out here.



7.3.7 Learner’s interface

Loading in a background image will give additional branding to each installation as shown below.


Overview
Details
Search for
Type
BROWSE ALL RESOURCES
Due Soon
ISO INTERMEDIATE
Bribery
Day 1: Your First Webpage (30 Days to Learn HTML & CSS)
Day 2: Finding a Proper Code Editor (30 Days to Learn HTML & CSS)
Day 3: Lists (30 Days to Learn HTML & CSS)
Administration
blog
Your CV
Apprentix Video
Start to Create an e-Learning Session
Applying for Universal Credit
Bookboon Resources
Business Skills
ISO BEGINNERS
ISO INTERMEDIATE
Example work 5
Organisational Structures
MANAGING CONFLICT AND RESILIENCE IN ACTION

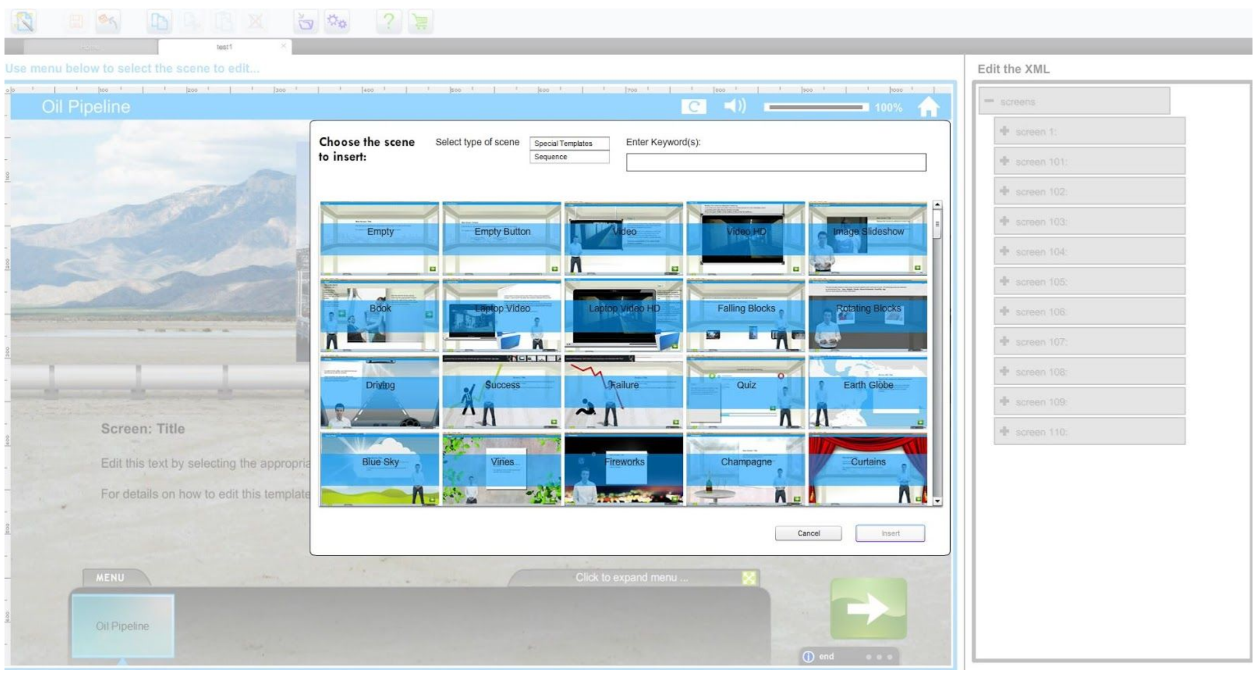
8 Create e-Learning with Jackdaw Cloud

Jackdaw Cloud has been designed by an ergonomist to be easy to use. Follow the on-screen guide to setup your first course with a customised screen.

There are essentially four tasks to learn to allow you to create our unique corporate video meets e-learning style of courses (with a proven 98% approval rate in wide scale independent studies.) These are introduced in the on-screen tour, but an overview is listed below:

8.1 New Template

Pressing the New Template button on the top left hand of the screen brings up the template list. There are around 250 templates (the number is always expanding.) An “Empty” template can be selected or one with a predefined theme or special effect (3D book, falling blocks etc.)

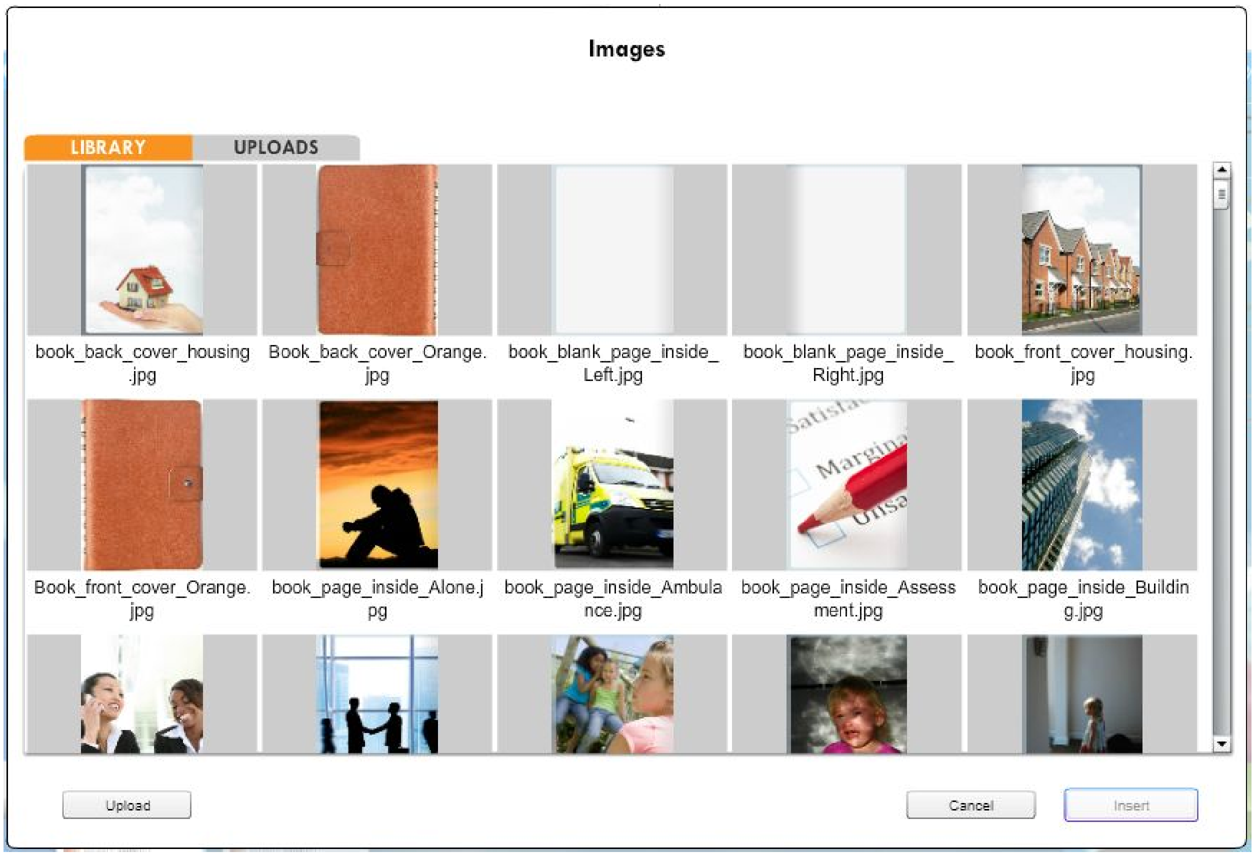


The advantage of working with templates is that the design is built into the template which makes it very easy to rapidly produce a course which can then be customised to each course’s requirements.

8.2 Tools

The tools in the system allow the addition of new elements. Double click on each to add a new item to the centre of the screen; clicking on backgrounds will add a new background to the screen.

Clicking on **Narrator, Image** and **Background** will allow you to select an item in the Jackdaw Library, else new items can be uploaded from your local machine.

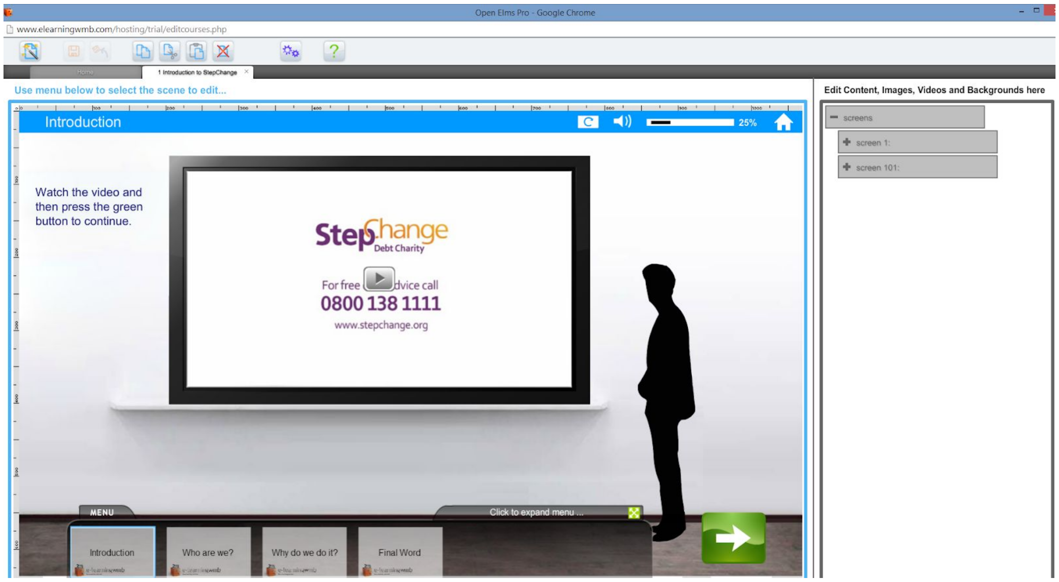


8.3 Library

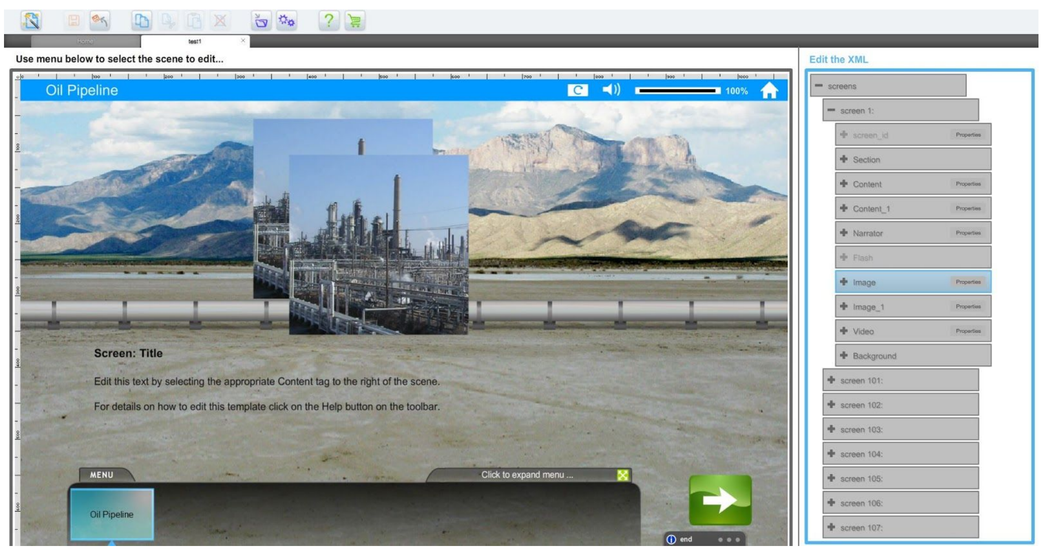
Library items can be accessed directly from the library tab. Backgrounds, Images, Video, Animations and Narrators are all previewed and inserted on screen by double-clicking on the bar or selecting the item and pressing **Insert**.

8.4 Copy, Cut, Paste and Delete

Using these on screen buttons you can edit an element of a course. For instance if you want to remove a screen, highlight that screen in the bottom menu (so it has a blue highlight frame around it) and press **Delete**.



Alternatively you have an image on the screen but you want a further one, here we expand the step, highlight Image and Copy and Paste it. A new Image has now been created (the screen below is shown after the Save button has been pressed).

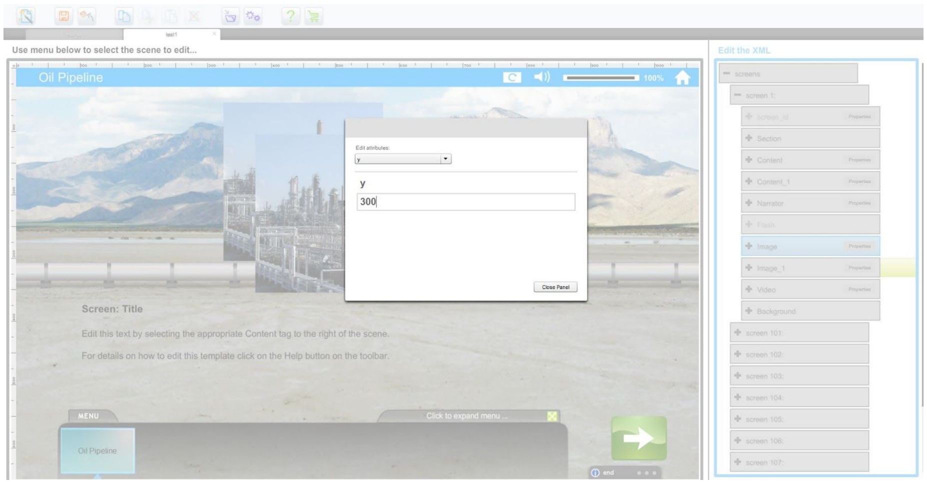


This same principle can be applied to all elements - e.g. adding more text on screen, pages in a book, or blocks that fall from the sky etc.. Copy and paste existing elements to create new ones.

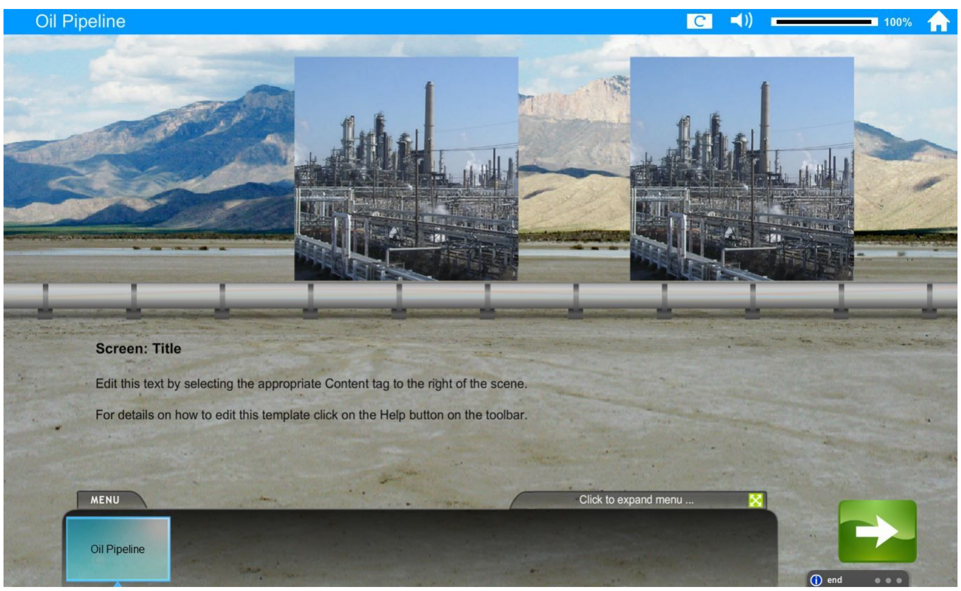
8.5 Properties

The second feature to learn is the properties. Each element has properties unique to that element (videos have an autostart property, Images have a target ID to turn them into buttons, Content text elements have an option to include a background etc.) as well as common positional properties (x, y, width and height).

We can adjust the x and y properties (using the margin rulers as a guide to making the relative adjustments) ...



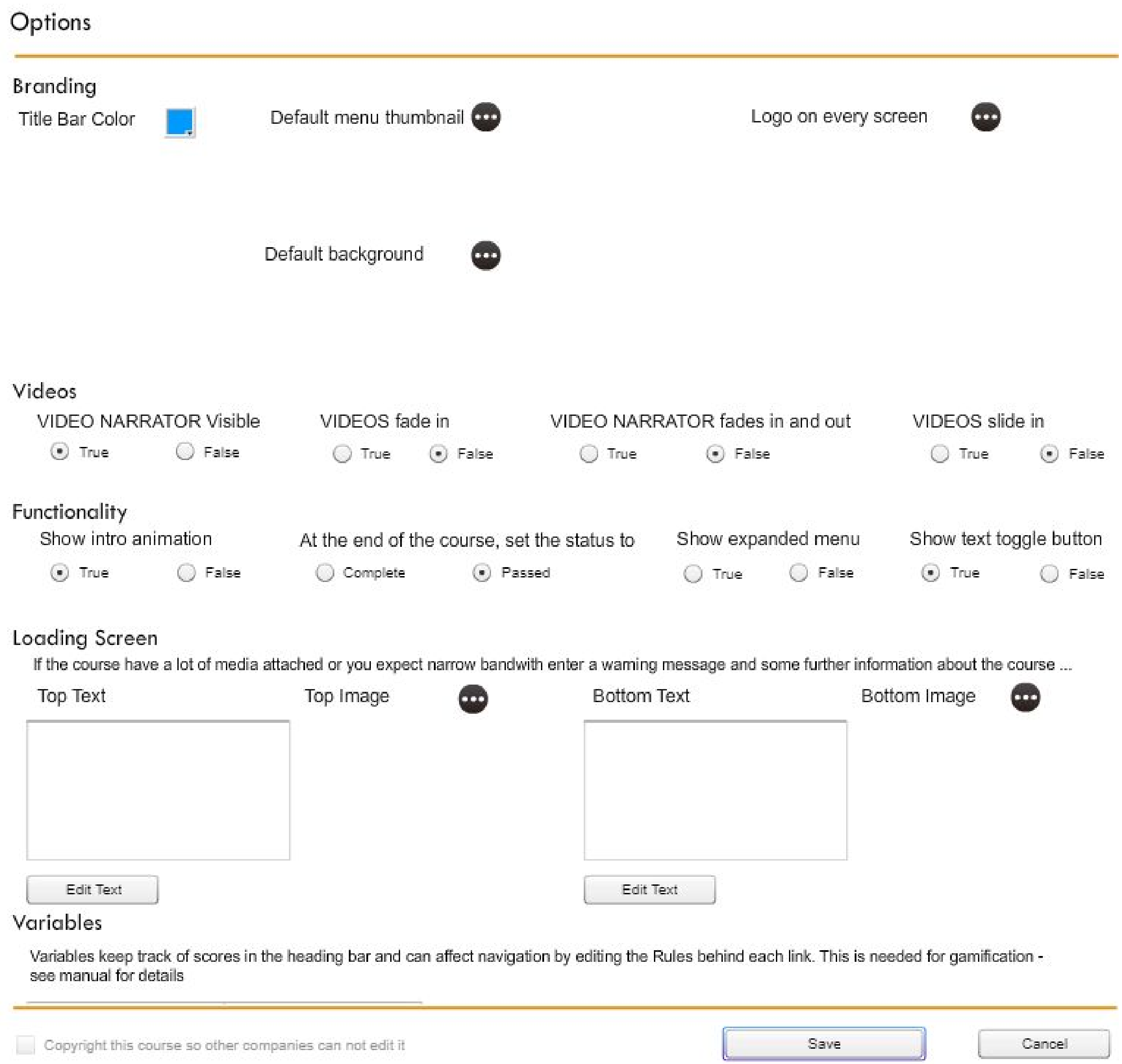
so the new image is displayed correctly.



8.6 Options

Pressing the Options button (Cog Wheel on the toolbar) produces the options screen. Here features can be changed that affect the entire course, this should be used to rebrand the course (menu items, colours used) and affect the look and feel of the video elements and loading screen etc.

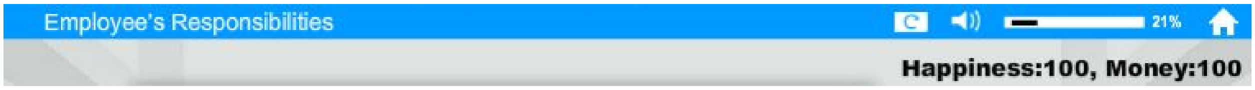
In the course Options variables can be defined which can be used to create online games (more of this explained in the next section).



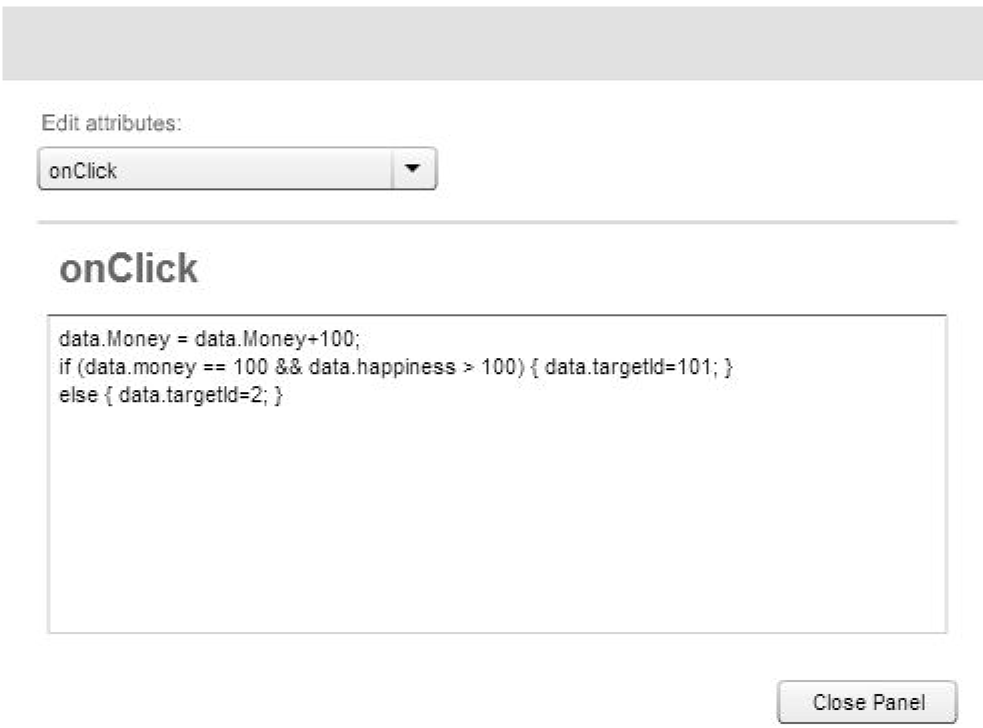
Once those five tasks are mastered you will be able to produce e-learning meets corporate video courses with Jackdaw Cloud. The system has been designed to be easy to use without training, although e-learning WMB does allow training courses. Any courses produced can also be exported as IOS or Android Apps - inquire for details on how to do this.

8.7 Variables & Gaming

Variables can be used to keep score of certain constructs which can be defined values depending upon the decisions each trainee makes - this is the foundation of linking screens to creating games with Jackdaw Cloud. For example a course can be defined which keeps a record of the happiness and money values for the trainee, throughout the course the values can be analysed and the feedback can alter depending upon the value of each variable. These variables are recorded at the top of the screen; e.g.



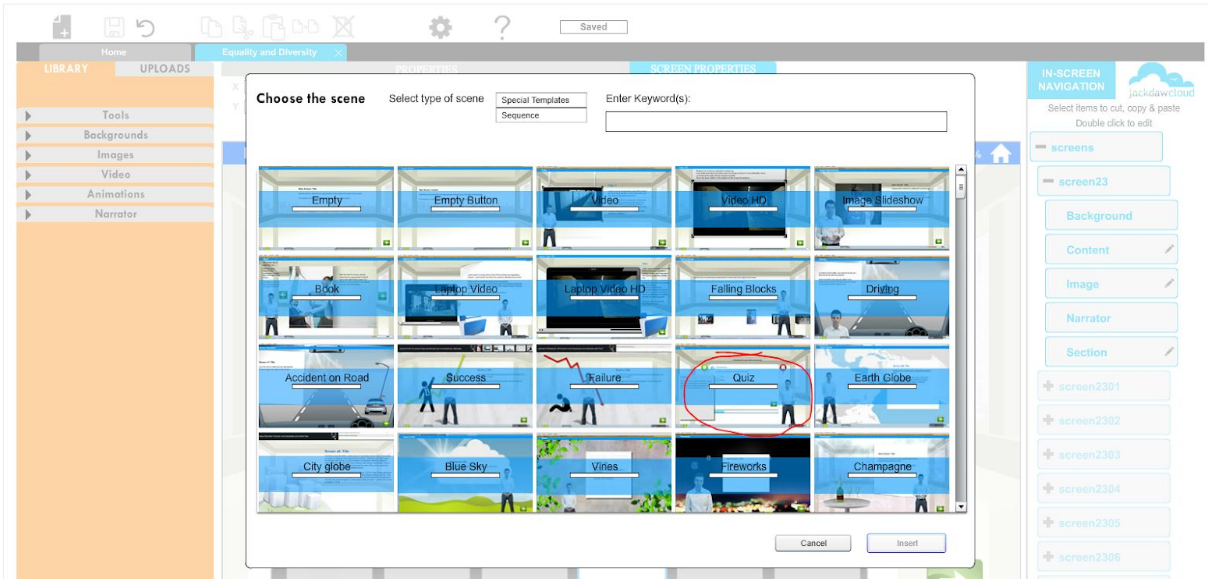
Variables are analysed by editing the onClick property of a button. For instance the following code increases the value of Money by 100 and then analyses the result - if Money equals 100 and happiness is greater than 100 the trainee goes to screen ID 101, else the user goes to the next screen entirely. This can be used to create intelligent branching.



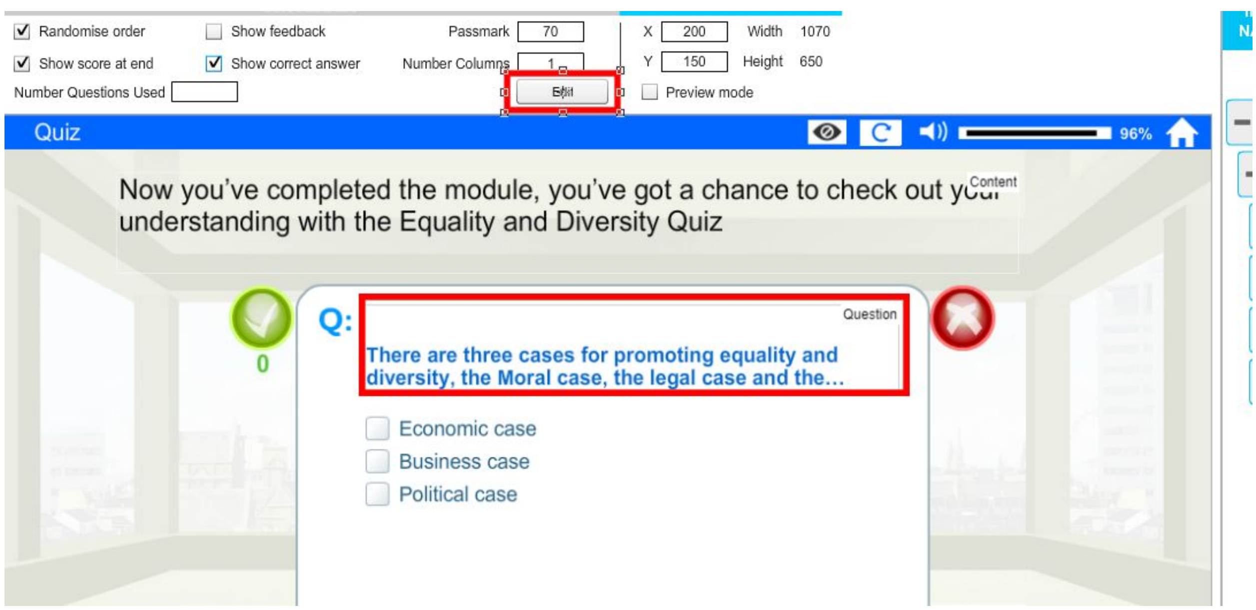
Do not worry if this last section appears a little complicated - it is not necessary for most courses and only lets you expand what is possible using Jackdaw Cloud. Further information and training on using this pseudocode can be obtained directly through e-learning WMB.

8.8 Quizzes

Quizzes can be added to any e-learning module by selecting the Quiz template as shown - entitled “Quiz”. Note that only one quiz can be added per module.



Once the quiz template has been selected an example exam type questionnaire is added to the e-learning. This quiz can be edited by double clicking on 1. **the question text** or 2. The **Edit** button.



The author needs to decide upon what type of question to ask ...

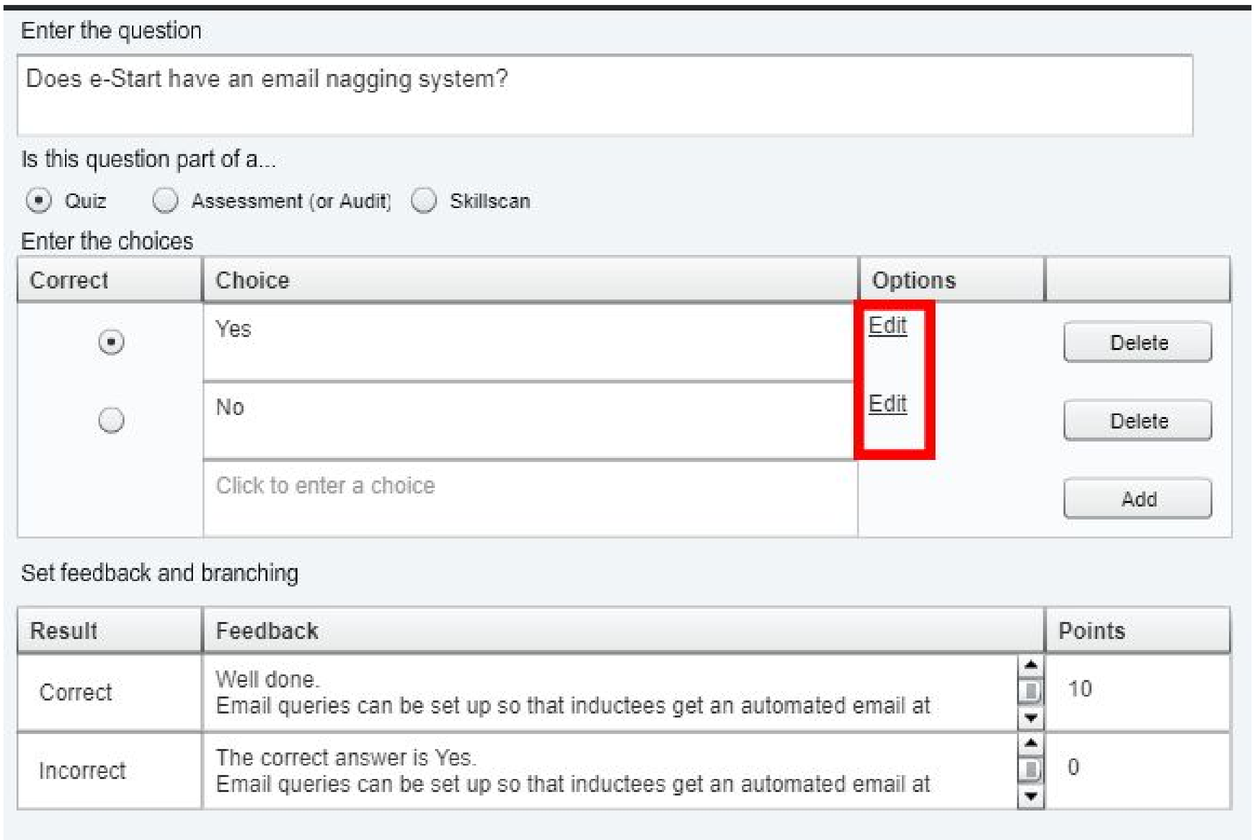
- **Quiz** These questions assess a learner's knowledge. This aptitude test is used to see if the learner is capable enough to pass the course.
- **Assessment (or audit)** This question assesses the work environment, systems etc to see if there is anything that needs any remedial action. An example would be a risk assessment, a needs analysis, a financial audit etc.
- **Skill Scan** This type of question assesses the underlying skills

possessed by each learner's at the start of an entire learning programme. As the learner proceeds through the programme they are periodically assessed with the same skill scan questionnaire to see how they are improving over time.

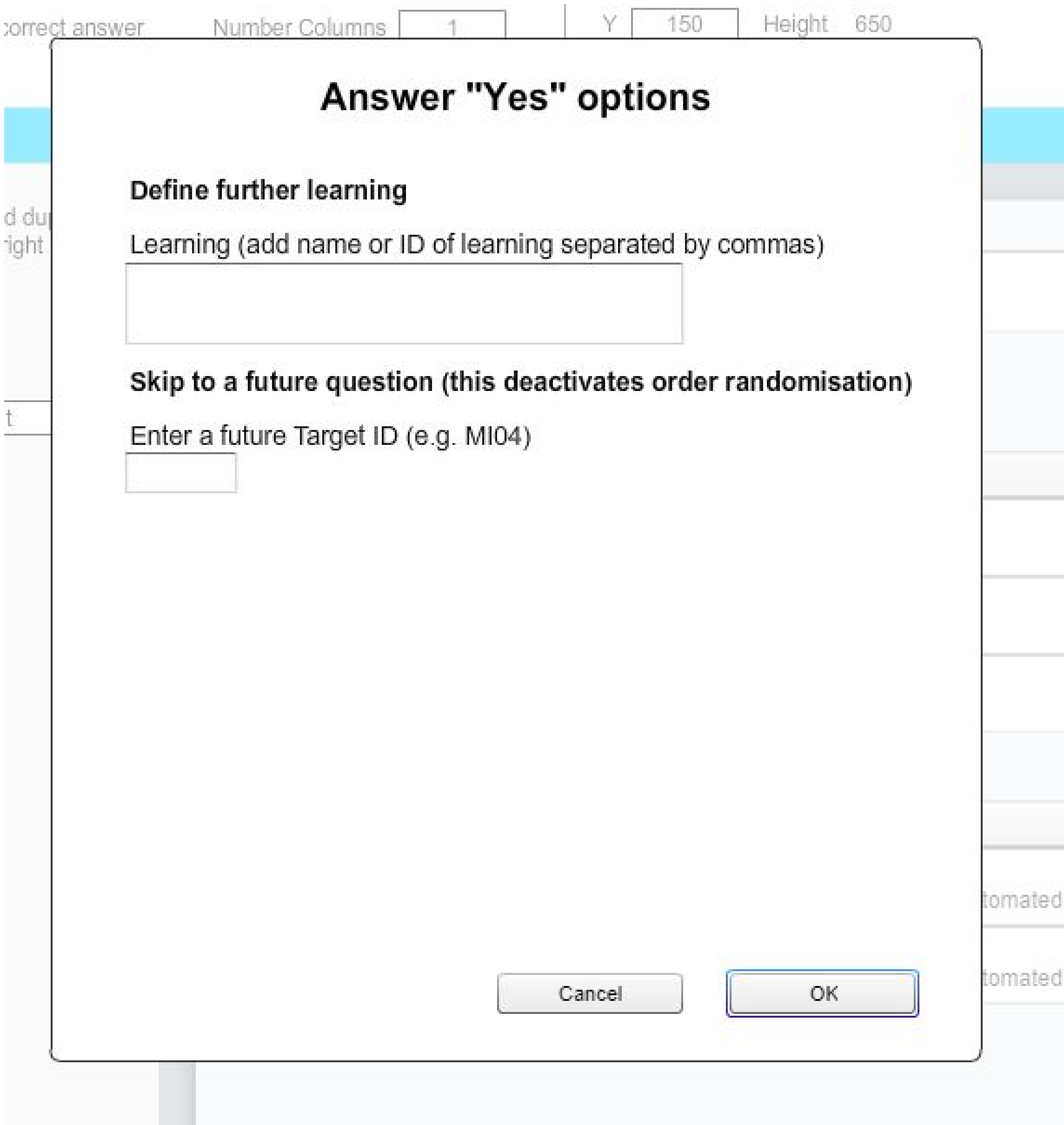
You should only use one of each type of question in

8.8.1 Quiz Questions

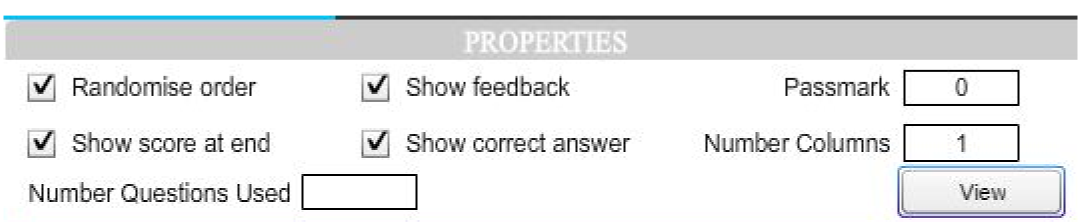
These questions have one Correct answer and feedback for each incorrect and correct answer can be defined.



Pressing the Edit link above, enables the editor to define further information about each answer. For instance should any additional learning be carried out (it is important to enter the e-learning module that needs to be assigned to the account as a result of the answer) and if the response leads to a skipping to another question then a future target ID can be entered (not you must not randomise the order of questions if this is being done.)

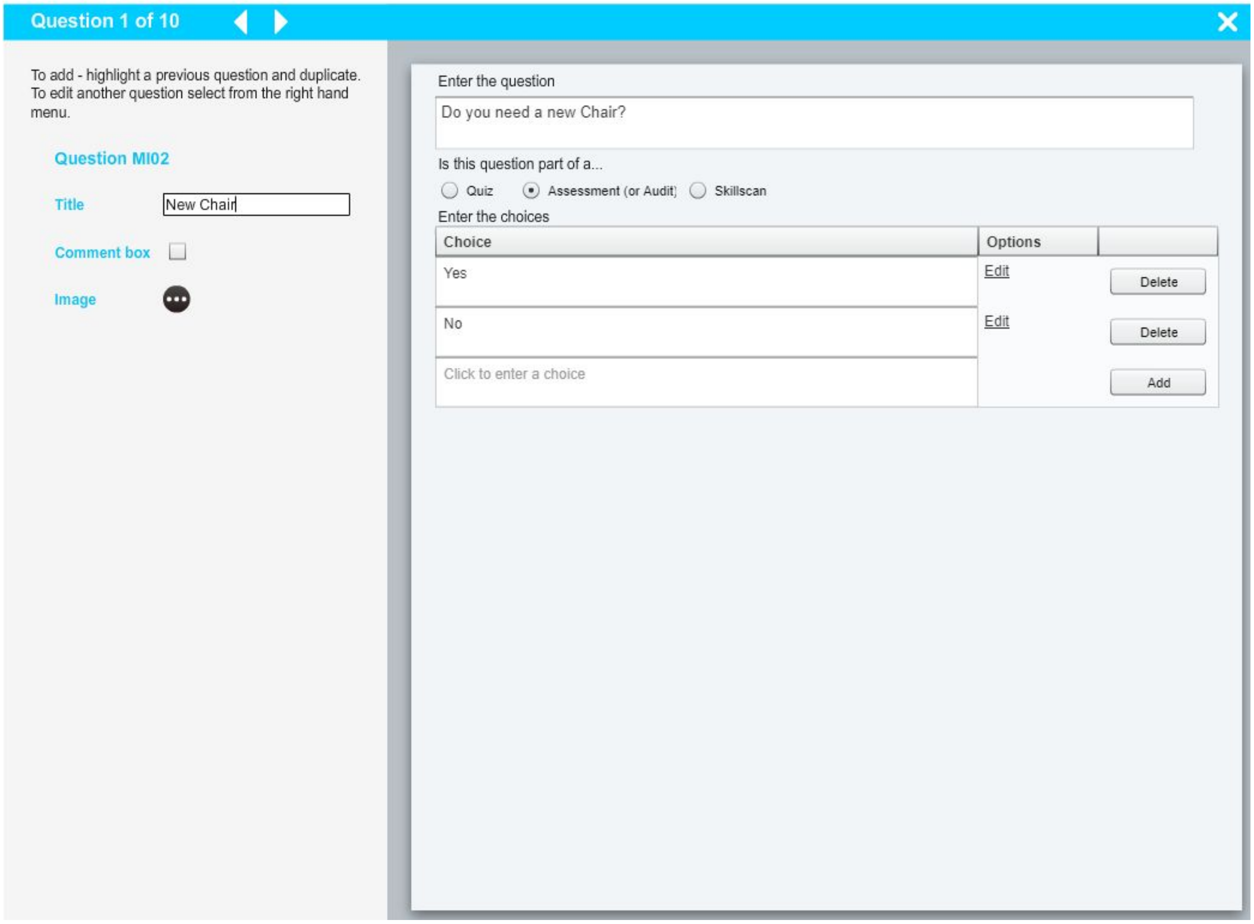


For each quiz a series of properties allows the editor to alter how the quiz looks and behaves; note it is very important to set a pass mark for each quiz as failing the quiz will make it mandatory for it to be retaken..

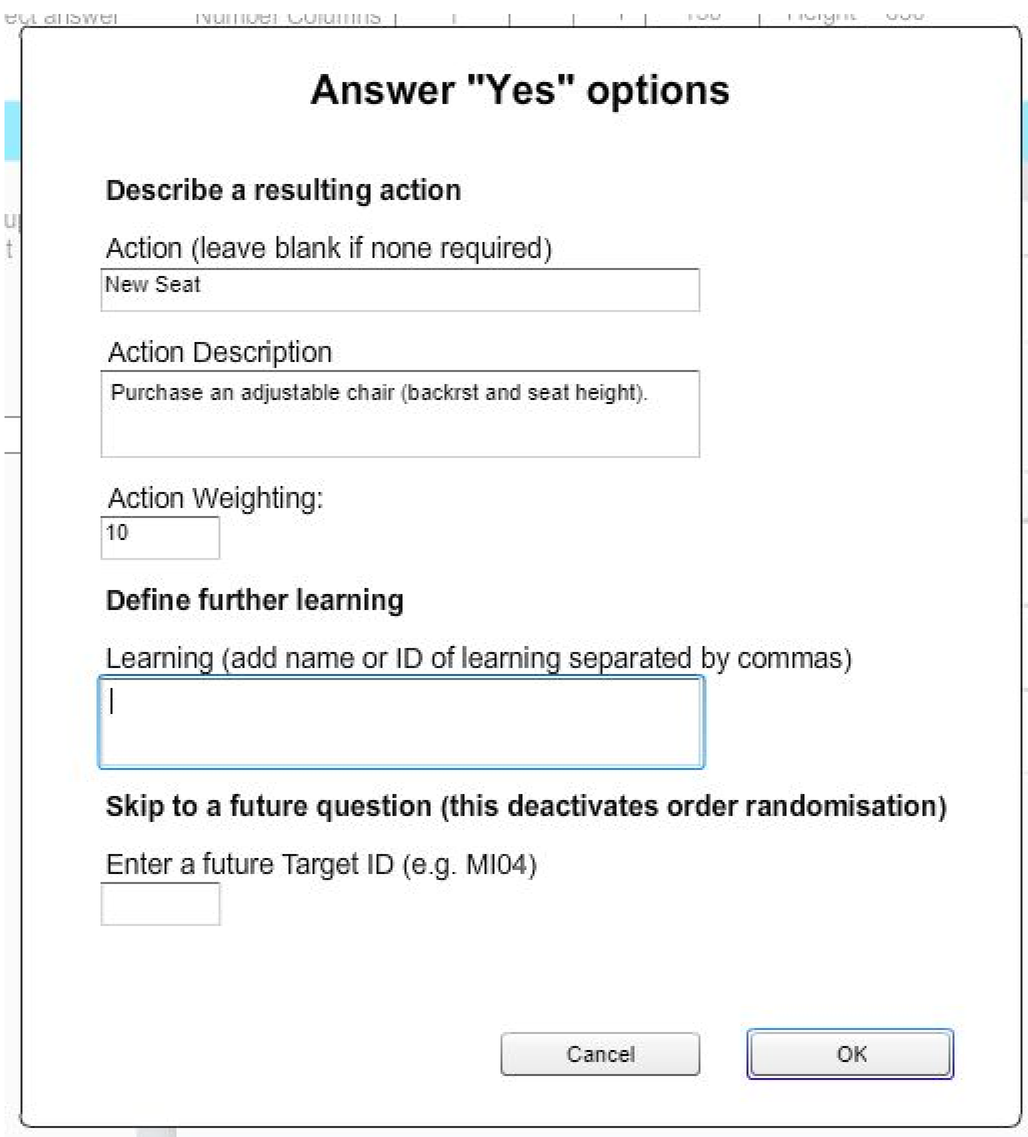


8.8.2 Assessment Questions

The assessment questions give you the option to ask a question with possible answers ...

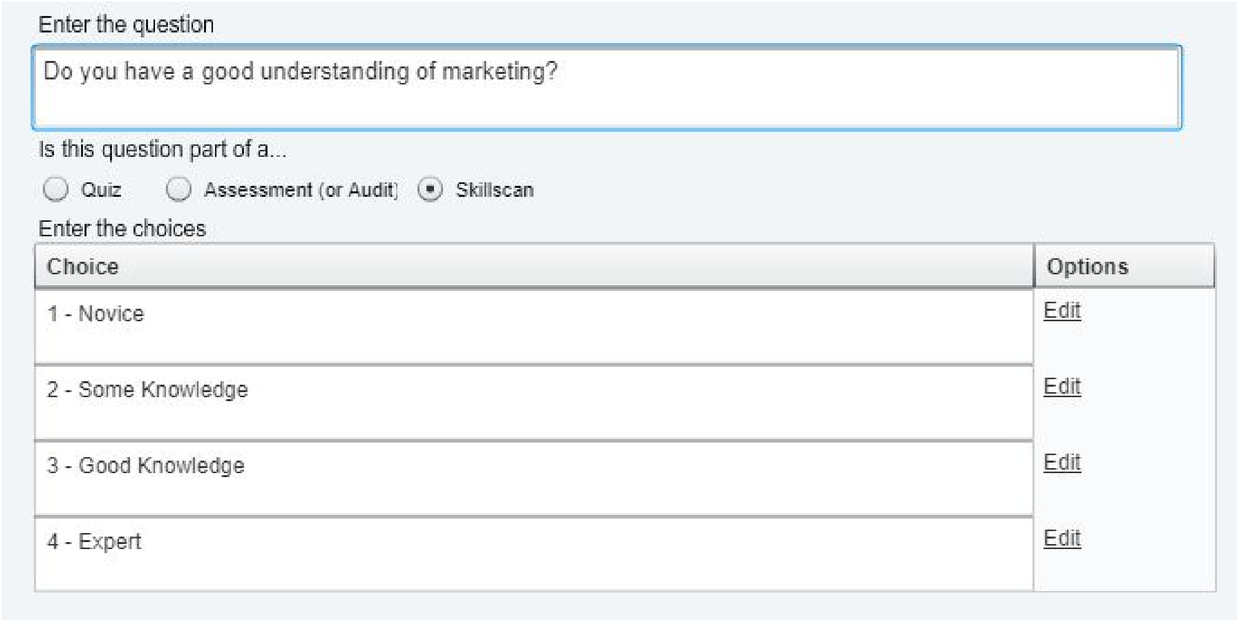


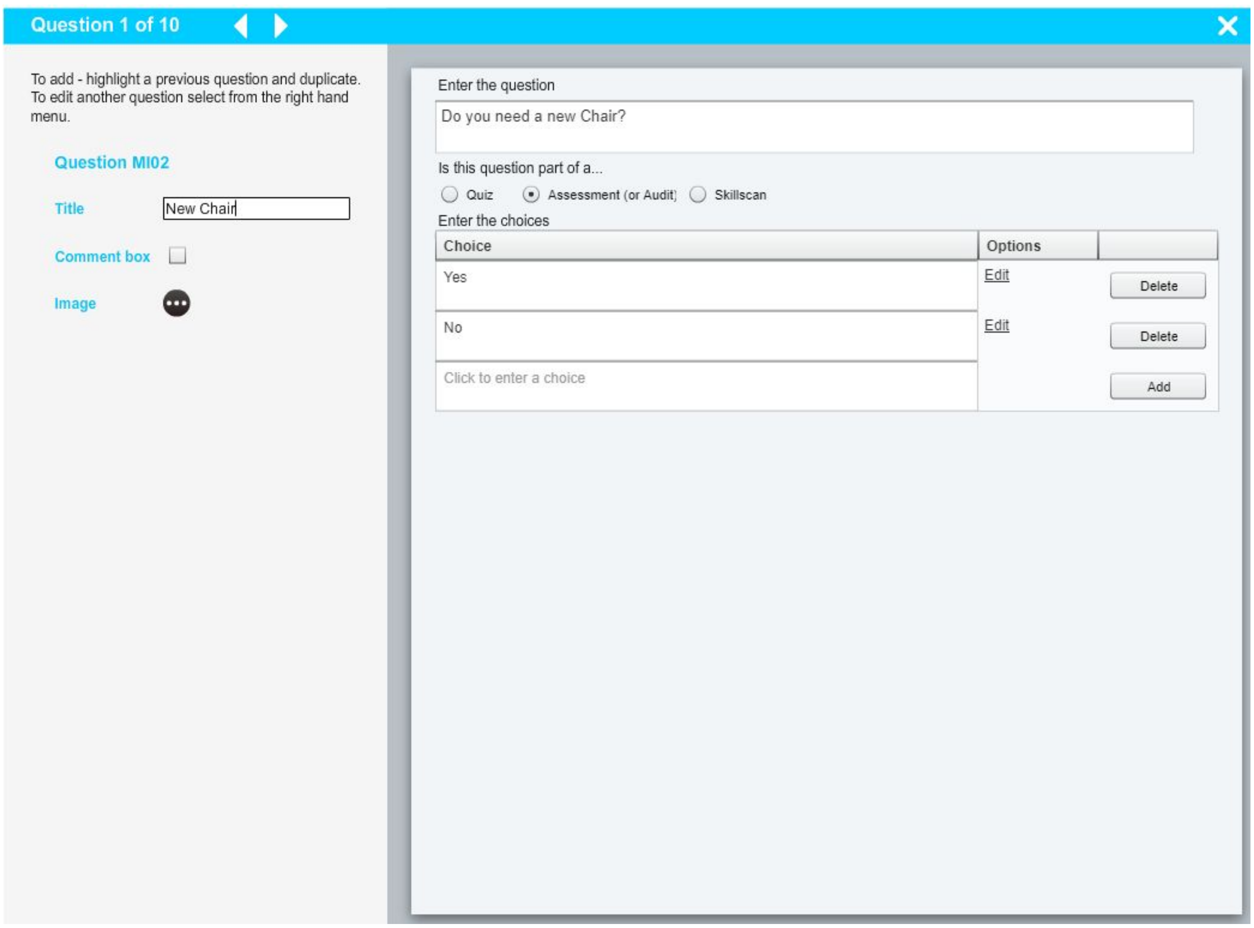
These answers create tasks which are defined through the **Edit** button ...



8.8.3 Skill Scan Questions

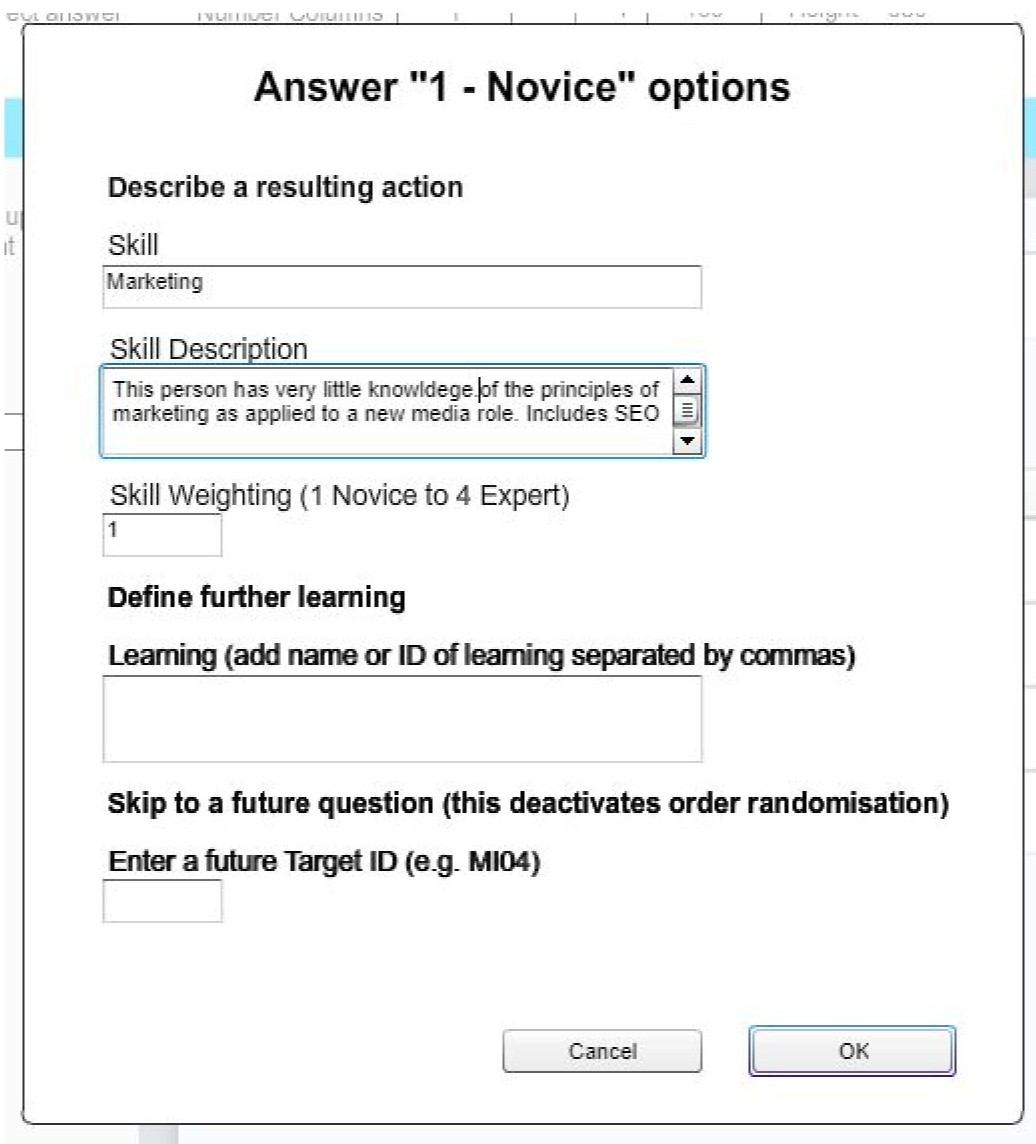
The skill scan questions give you the option to ask a question with possible answers prefilled in (note that there are only ever 4 options in a skill scan) ...





Each answer records a separate skill level (marked as 1 to 4) which are defined through the

Edit button ...


Answer "1 - Novice" options
Describe a resulting action
Skill
Marketing
Skill Description
This person has very little knowldege of the principles of marketing as applied to a new media role. Includes SEO
Skill Weighting (1 Novice to 4 Expert)
1
Define further learning
Learning (add name or ID of learning separated by commas)
Skip to a future question (this deactivates order randomisation)
Enter a future Target ID (e.g. MI04)
Cancel
OK

Appendices

9 Appendix 1: Setting up Single Sign-on

9.1 Using a Shared Token

1) Select a secret key that you will use for encryption. e.g. '36cca1f4235fb4351f2701', this key is then entered into the cls_config.php file. Declare this in the code you will use to link to the Single Sign-on URL.

$key="36cca1f4235fb4351f2701";

2) Write some code that recognises the active user's ID (e.g. from AD) and assign it to the variable $token

$token= stocks1;

3) Create a signature for the user using the following php code (other variants are available for other languages):

$signature = hash_hmac('sha256', $token, $key);

4) access and log into the system using the following address

http://www.elearningwmb.com/hosting/*yourdomain*/login.php?token=$token&signature=$signature

users will then go straight into the application.

Testing the Single Sign-on Without Code

Calculate the signature string. The algorithm used us sha256. You need the shared key and the token identifier to calculate the signature. Here is a page you can use to do this:

http://www.freeformatter.com/hmacgenerator.html

For example, enter 'testtoken' in the 'message' box on the top, then enter '36cca1f4235fb4351f2701' as 'Secret Key'. Chose sha256 as 'message digest algorithm', Then hit 'Compute HMAC' and the page will produce a new string, which should be '4ccb4746f527a8456e382ee1c9bad73f5026fba1b62b652b4225d3accd65f1a9' in this example.

2. Use the auto signon by pasting the following link in your browser:

http://www.elearningwmb.com/hosting/trial/login.php?token=testtoken&signature=4ccb4746f527a8456e382ee1c9bad73f5026fba1b62b652b4225d3accd65f1a9

where 'token' is the token identifier and 'signature' is the hashed string produced at the previous step.

You can also use the token to directly go any given protected page. For example, you can go directly to lists of users, without having to visit login,php first:

http://www.elearningwmb.com/hosting/trial/usermaster.php?token=testtoken&signature=4ccb4746f527a8456e382ee1c9bad73f5026fba1b62b652b4225d3accd65f1a9

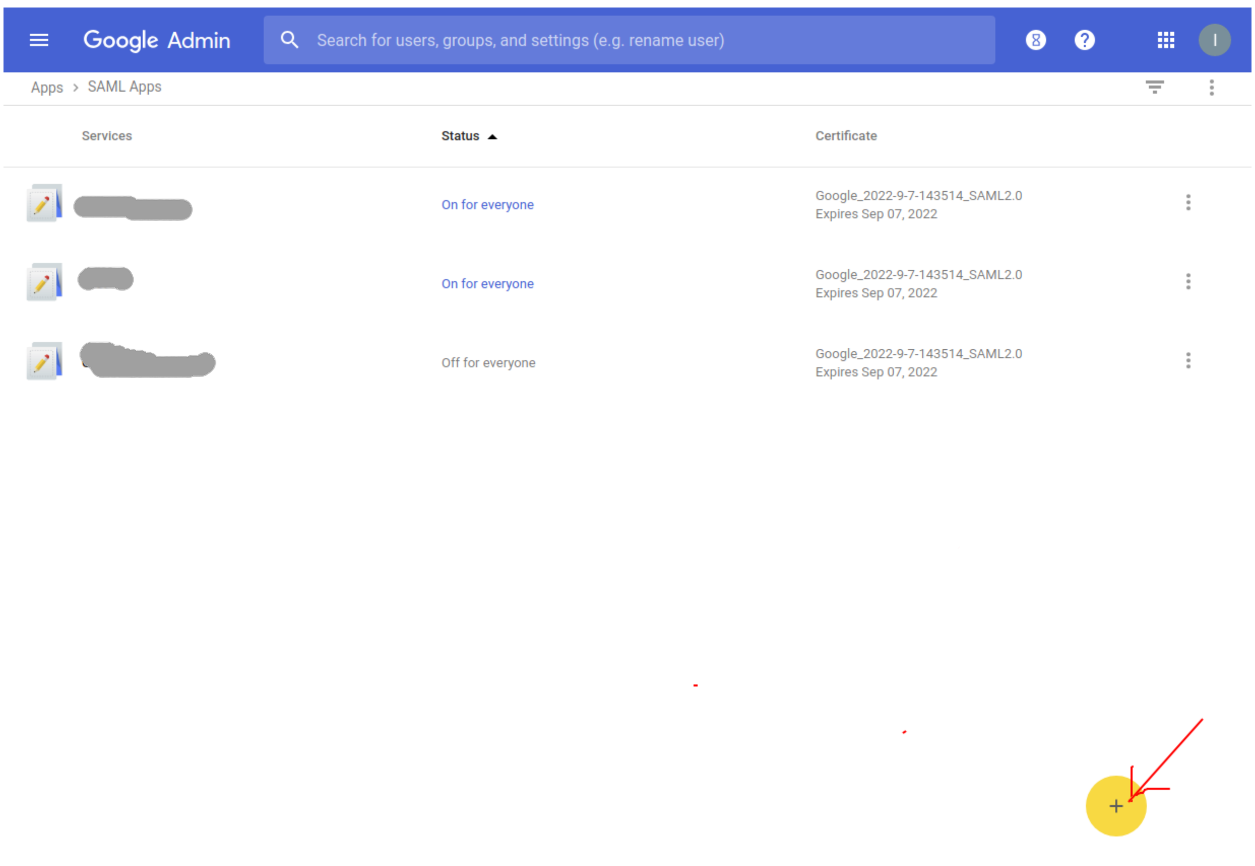
9.2 Using Google's SAML

This installation enables single-sign on using the log into Google ID - this is inherent with Google Docs, Chrome and Gmail. To get this to work on your customised site it first needs to be set up by the Company's Google Administrator by following these steps.

1. Log in to Google Admin Console (admin.google.com)

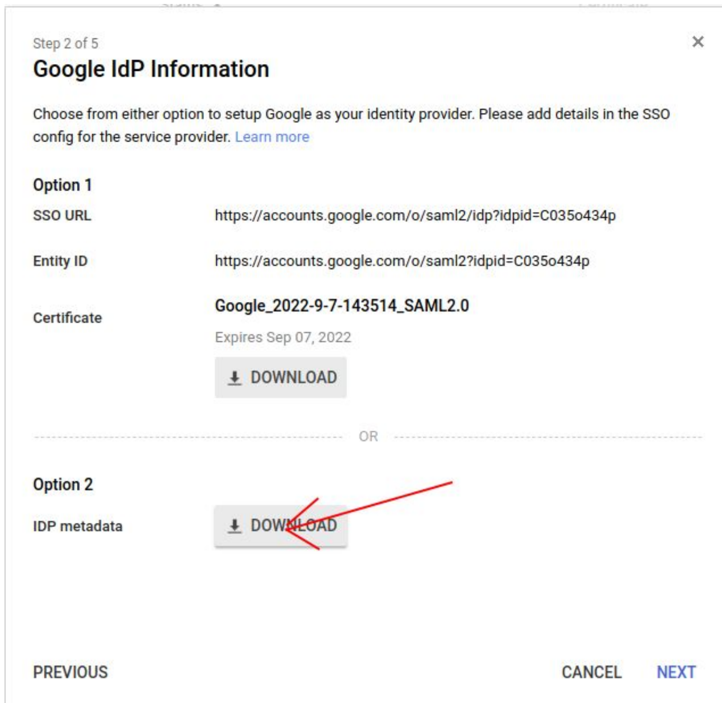
2. Go to Apps/SAML Apps

3. Click on 'Enable SSO for SAML Application' (yellow sign plus in the bottom right corner - screenshot below)



4. Select 'Setup My Own Custom App'

5. Choose the second option (see screenshot below). Download the IPD metadata file and send it as an attachment to the Open LMS team (support@e-learningwmb.com entitled “IPD SAML Information”). Then click ‘Next’.



6. Enter the App name (for example ‘Your Company LMS Training’). Click ‘Next’.

7. Enter the following SAML settings:

ACS URL: **https://openelms.e-learningwmb.co.uk/saml/module.php/saml/sp/saml2-acs.php/LMSID**

Entity ID: **https://openelms.e-learningwmb.co.uk/saml/module.php/saml/sp/metadata.php/LMSID**

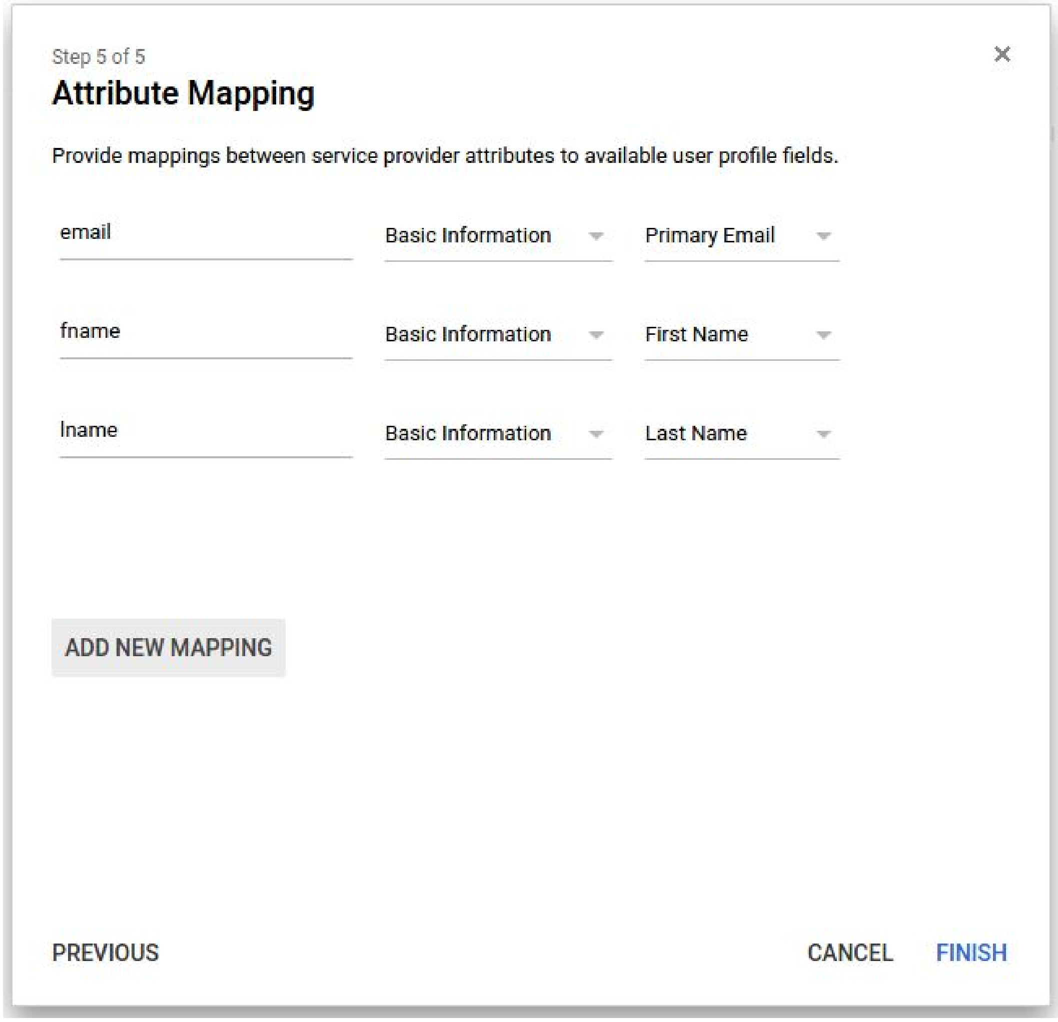
Start URL: **https://openelms.e-learningwmb.co.uk/LMSID/saml/**

,where **LMSID** is the identifier of your Open LMS installation. You can get he identifier from the link you use to access the Open LMS web application. For example, if the link is **https://openelms.e-learningwmb.co.uk/somecompanyname**, then the identifier of your Open LMS installation (i.e. **LMSID**) is **somecompanyname**.

Click ‘Next’.

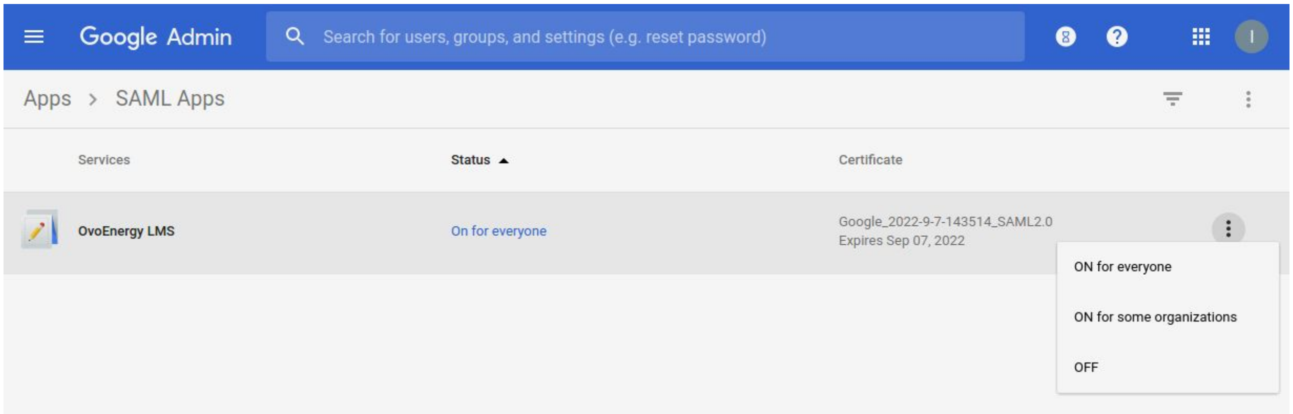
`

8. Add three mapping which let Open LMS identify your users. Add them by click on the 'Add New Mapping' button:



Click 'Finish'.

9. Enable the applications to the desired set of users (or enable it for everyone in your organization):



10. Launch the application from Google Admin or directly by going to the start url:
https://openelms.e-learningwmb.co.uk/LMSID/saml/
When a user launches the application, LMS will use their email to check whether such a user is already registered with LMS. If not, a new account will be created and it will be assigned the default courses. We will also set up the default department and company id of the new trainee. If you want to assign the trainee to a particular department or company in LMS, you need map two more attributes (‘department_id’ and ‘company_id’). You can map an attribute ‘password’, which will be the new LMS password of the trainee’s account.

Important: In order to enable the application we need to setup the Entity ID and the certificate of your Google account into LMS. We can do this only if you provide the relevant IDP metadata file. You need to send it to us by email (or any other means).

10 Appendix 2: Examples of how to use Open ELMS API

The following document is a sketch out of the tasks required for integration. The information here uses Knowledgepool as an example, although it could apply to any third-party application.

The actual implementation calls will be finalised by the programmer once custom code is created and security keys etc are finalised.

10.1 Import a user from Knowledgepool into Open ELMS

HTTP Request Type: POST Request URL:
https://www.elearningwmb.com/hosting/unilever/ext/user Fields:ACCESS_KEY: 2f8$f43zddsA$234dww1KS KNOWLEDGEPOOL_USER_ID:

e.g. 10 ORGANIZATION_ID: e.g. 3 FIRST_NAME: e.g. John LAST_NAME: e.g. Smith

Please notice that you can't import the same Knowledgepool user twice. If you try to do this, you will get a http 500 error and a message "Failed to create user".

10.2 List available courses

HTTP Request Type: GET Request URL:
https://www.elearningwmb.com/hosting/unilever/courses?ACCESS_KEY=2f8$f43zddsA$234dww1KS &ORGANIZATION_ID=10

The response is a list of OpenELMS course ids. The is given in JSON format. Let me know if you prefer plain text.

10.3 Assign a user to a course

(this user must have already been imported into OpenELMS) HTTP Request Type: POST Request URL:

https://www.elearningwmb.com/hosting/unilever/ext/courses/56/user/25

- 56 - an example of an OpenELMS course id
- 25 - an example of a Knowledgepool user id

10.4 Remove a user from a course

HTTP Request Type: DELETE Request URL:
https://www.elearningwmb.com/hosting/unilever/courses/56/user/25?ACCESS_KEY=2f8$f43zddsA$234 dww1KS 56

- 56 - an example of an OpenELMS course id
- 25 - an example of a Knowledgepool user id

10.5 Retrieve the status of a course for a specific user

HTTP Request Type: GET Request URL:
https://www.elearningwmb.com/hosting/unilever/courses/56/user/25?ACCESS_KEY=2f8$f43zddsA$234 dww1KS 56

- 56 - an example of an OpenELMS course id
- 25 - an example of a Knowledgepool user id

The result is a JSON array having three values - "Completion Status", "Pass/Fail Status", "Score" For example:

{ "In Progress", "Not Attempted", "" }

10.6 Login a Knowledgepool user to OpenELMS

HTTP Request Type: POST Request URL:
https://www.elearningwmb.com/hosting/unilever/hosting/test/ext/login Fields:ACCESS_KEY: 2f8$f43zddsA$234dww1KS UNILEVER_USER_ID:

e.g. 10 COURSE_ID: e.g. 56

The return value is a link which lets the Knowledgepool user open the course. For example:

http://www.elearningwmb.com/hosting/unilever/redirect/UNILEVER54eef685b84ce9.66390169

The link is unique and can be used only once. It will redirect the user to a OpenELMS web page, where the course is run. The link should be open in the browser of the end user, not server-side.

11 Appendix 3: Jackdaw Cloud API

11.1 What does the API do?

e-Learning WMB encourages the open use of the Jackdaw Cloud authoring software with other systems, allowing for a fully integrated e-learning editing solution into third-party Learning Management Systems. The API will enable the third-party software to do a number of tasks including:

- Editing a Jackdaw Course
- Creating or deleting a Jackdaw Course
- Running and recording a course which resides on the Jackdaw server
- Downloading a Jackdaw SCORM zip file

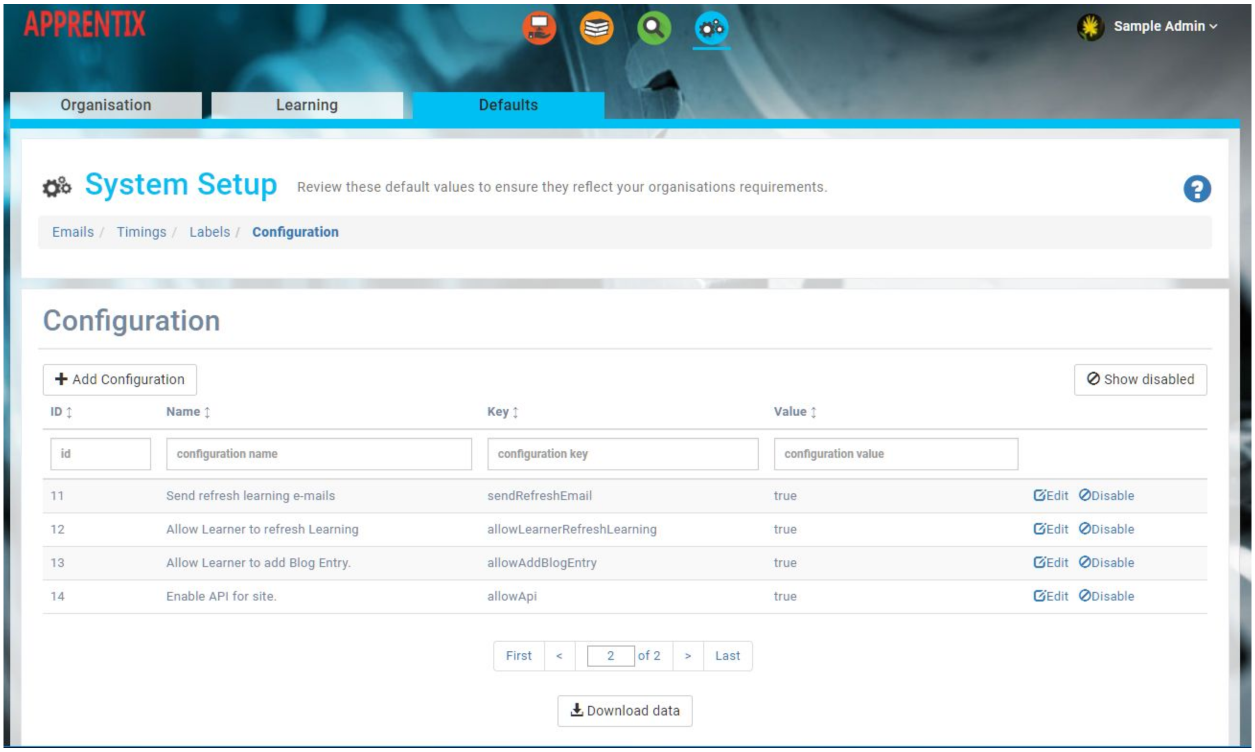
11.2 Who are these instructions for?

These instructions are for administrators of third party Learning Management Systems wishing to integrate Jackdaw Cloud into their system, some technical knowledge is needed to implement the API and a dialog with e-Learning WMB support staff (support@e-learningwmb.com) is encouraged to help with the process.

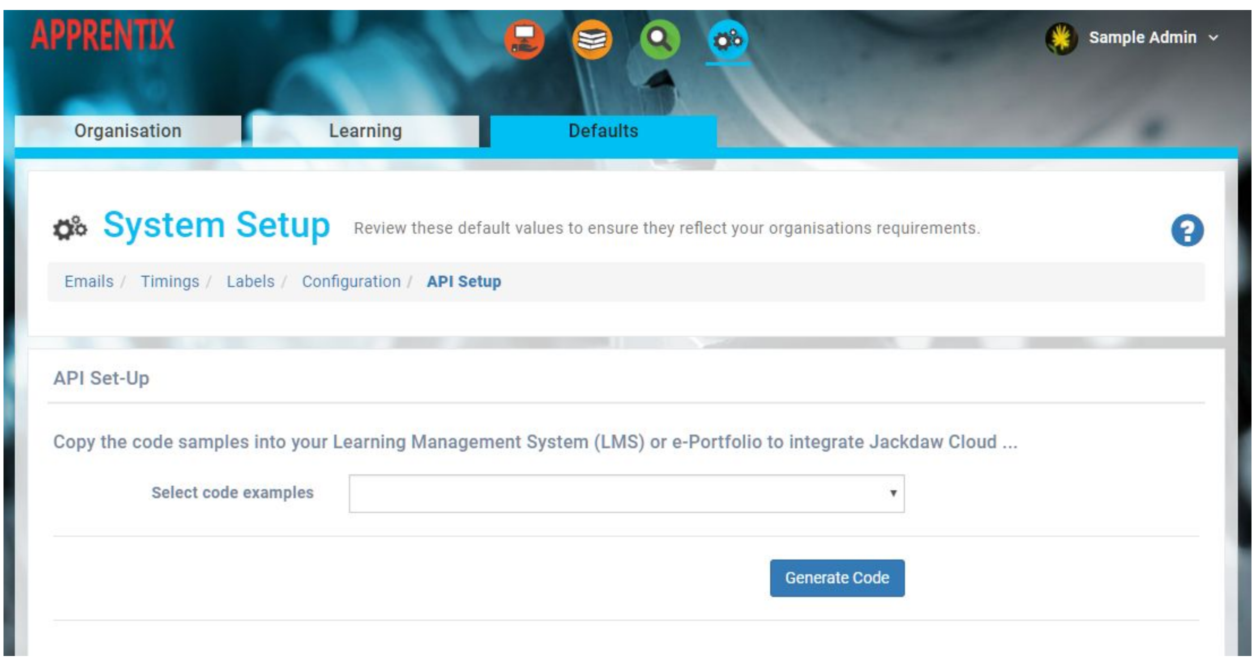
Example code is provided by the system for .

11.3 Enabling the API

To enable the API for the installation, it is necessary to login to **Admin > Settings > Defaults > Configuration** and find the configuration element **Enable API for site**. Edit this and set it to True.



Refresh the screen (select f5 on the keyboard) to display the additional menu item “API Setup” ...

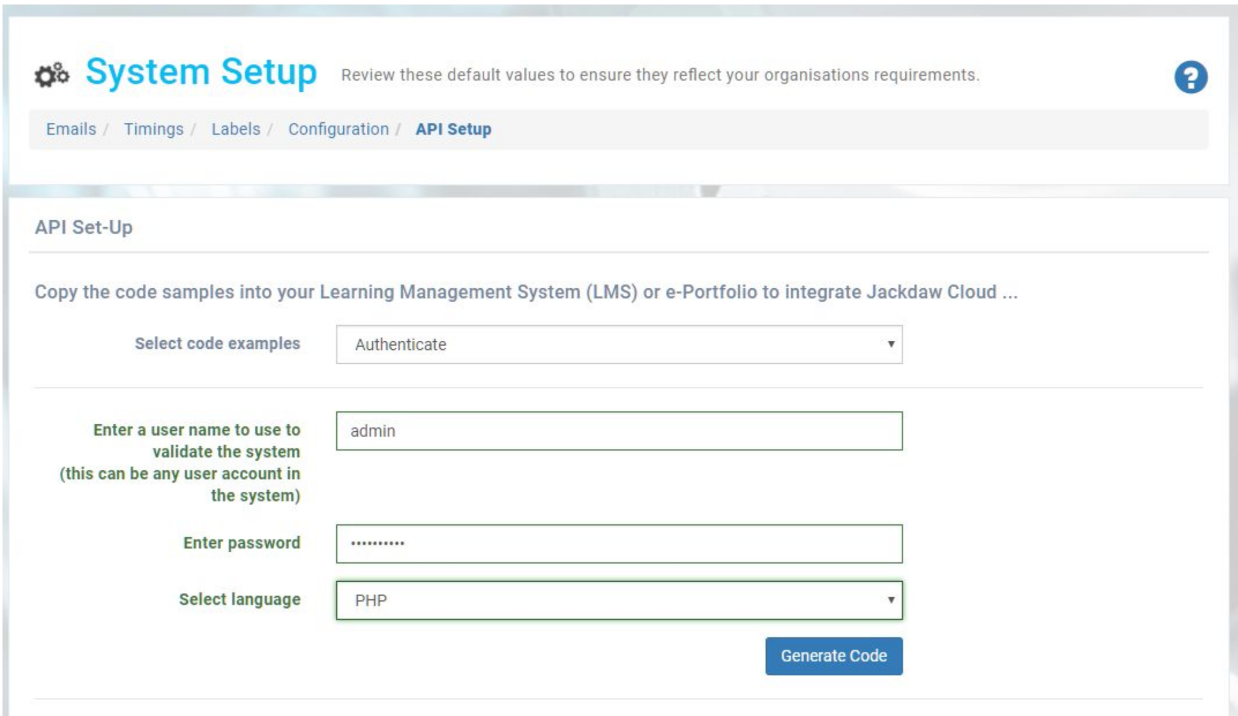


The system is ready for integrating Jackdaw Cloud with a third party learning management system.

11.4 Authenticate

Prior to doing any calls to the system's API, the coder will need to authenticate the third party system in order to use the API. The steps to do this are as follows:

1) Obtain any username and password combination from Open Elms/Apprentix, enter them in the first two boxes below.



2) Select the language the third-party system is coded in (PHP, JAVA, PYTHON etc.)
3) Press **[Generate Code]** - this will set the value of $SESSION_HASH.

NB You will need the $SESSION_HASH value on all subsequent calls to the system in order to validate each call.

Make sure this value is always available.

11.5 Creating New Courses with Jackdaw

This code would be used to create a new e-learning course within a third-party LMS, typically attached to a **New e-Learning** link.

11.6 Editing Courses with Jackdaw

This code would usually be associated with an **Edit** link attached to an e-learning course.

The coder can select whether to match the course in the third party system with Jackdaw by **course name** or **course ID**. Do not worry overtly if the names and ID become asynchronous (a name has been edited in the third party system but not in Jackdaw etc.). The administrator will be given the option to select the course match manually on first editing each course - these matches will then be recorded in the system.

This call opens the course in Jackdaw Cloud in a new window.

11.7 Run e-Learning from Jackdaw Server

This API call allows the third-party course to run the e-learning directly from the Jackdaw Server (this means no importing of courses is necessary). SCORM calls will be made as per usual and fed back to the third-party Learning Management System.

Again if no match to the name or course ID is detected, then a user with administration rights to Open Elms will select the matched course on first running each course to lock down this association.

11.8 Download Jackdaw Course as Zip File

This API call enables the user to add a link to each course to download the SCORM zip file from the Jackdaw Cloud. This SCORM v1.2 zip file can then be imported it into any third party Learning Management System.

11.9 Log Out

This call closes the session between the third party system and Jackdaw.

12 Appendix 4: Configuration Options

Open ELms Pro has a number of configuration options that need to be set by e-Learning WMB. These options will appear in the **Setup System > Defaults > Configuration** by the end of Q1 2018 to enable super administrators to change these features in the system themselves,

Option	Description	Default
LMS Name	The name used to describe the Learning Management System	Open Elms Pro
Default Welcome Text	The welcome message on the log in screen.	Welcome to Open eLMS Pro - the business focussed Learning Content Management System from e-Learning WMB.
Default Course IDs	The default courses assigned to new users when they register	32,44,48,50,51,52,53,54,55,56,57,58,59,60,61,62,63,64,65,66,88,99,100,102,104,105,106,108,110,111,112,114,116,121,122,123,127,128,129,130,135,137,138,141
Certificate Always Use Default Logo	This sets the certificate to use the company logo set on the home screen	true
Default Certificate Message Top	Message that appears under the logo on the certificate	e-learning meets corporate video
Default Certificate Message Bottom 1	Message at the bottom of the certificate	e-Learning WMB, Merlin House, Commerce Pk, Reading RG7 4AB
Default Certificate Message Bottom 2	Message at the bottom of the certificate	info@e-learningwmb.co.uk www.e-learningwmb.com
Allow Edit Email	Enables the super admin to edit the email that is automatically sent to users on registration	true
Employee Show Name	This resets this label for the	Employee ID

	users’ login if different from the default (on login, forgot email screens and in admin.) For instance you can use “Email”, “Payroll Number” etc.	
User Start Page	Sets the page which the standard trainee sees when they first login.	mycourses.php
Admin Start Page	Sets the page which the super admin sees when they first login.	usermaster.php
Overwrite Scores	If a user takes a test twice and on the second test the score is lower, the score is by default not overwritten.	false
Auto Login Key	For single sign-on this needs to be set to receive a token that validates the connection. Leaving the token empty disables the single sign-on.	
SMTP	The default PHP mailing function can be used. To use a client’s mail server to send emails the following needs to be set: host, port, auth (=true), username, password and secure (=ssl)	"host" => "smtp.gmail.com", "port" => 465, "auth" => true, "username" => "mail@e-learningwmb.co.uk", "password" => "*hidden*", "secure" => "ssl",
Show Translated Languages	This shows translated language options from Google Translate.	showGoogleTranslator = True

13 Appendix 5: Bespoke Options

13.1 Customisation

e-Learning WMB are owner authors of the system, as such can made customisations both rapidly and at a low cost. This can include anything from a full CMS Website skinned around the Learning Management System to a shopping cart add-on.

13.2 Bespoke e-Learning

At e-learning WMB we place video presenters in interactive virtual e-learning worlds to produce e-learning that is low cost to produce, but actually rivals TV documentaries in quality.



13.3 Off-the-shelf e-Learning

e-Learning WMB has nearly 150 e-learning sessions which can be added to the system.

Apprenticeship Standard Delivery

If your company is managing apprenticeship training, then the company offers an e-portfolio and e-learning development service called Apprentix Platinum.

13.4 Membership

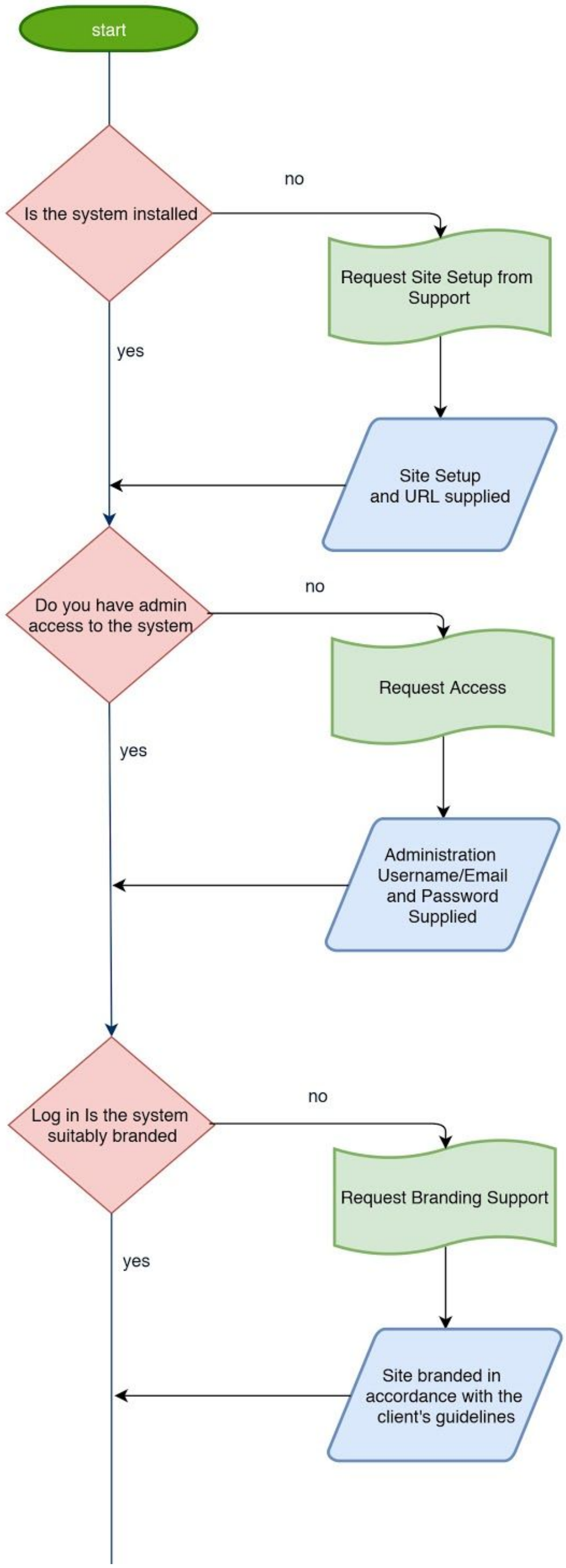
Membership is a revolutionary new concept in e-learning. Membership enables you to source all your e-learning needs to one supplier, no additional payments, fees etc. Its like having an entire e-learning department attending to your every need, including designer, developers, project management and support.

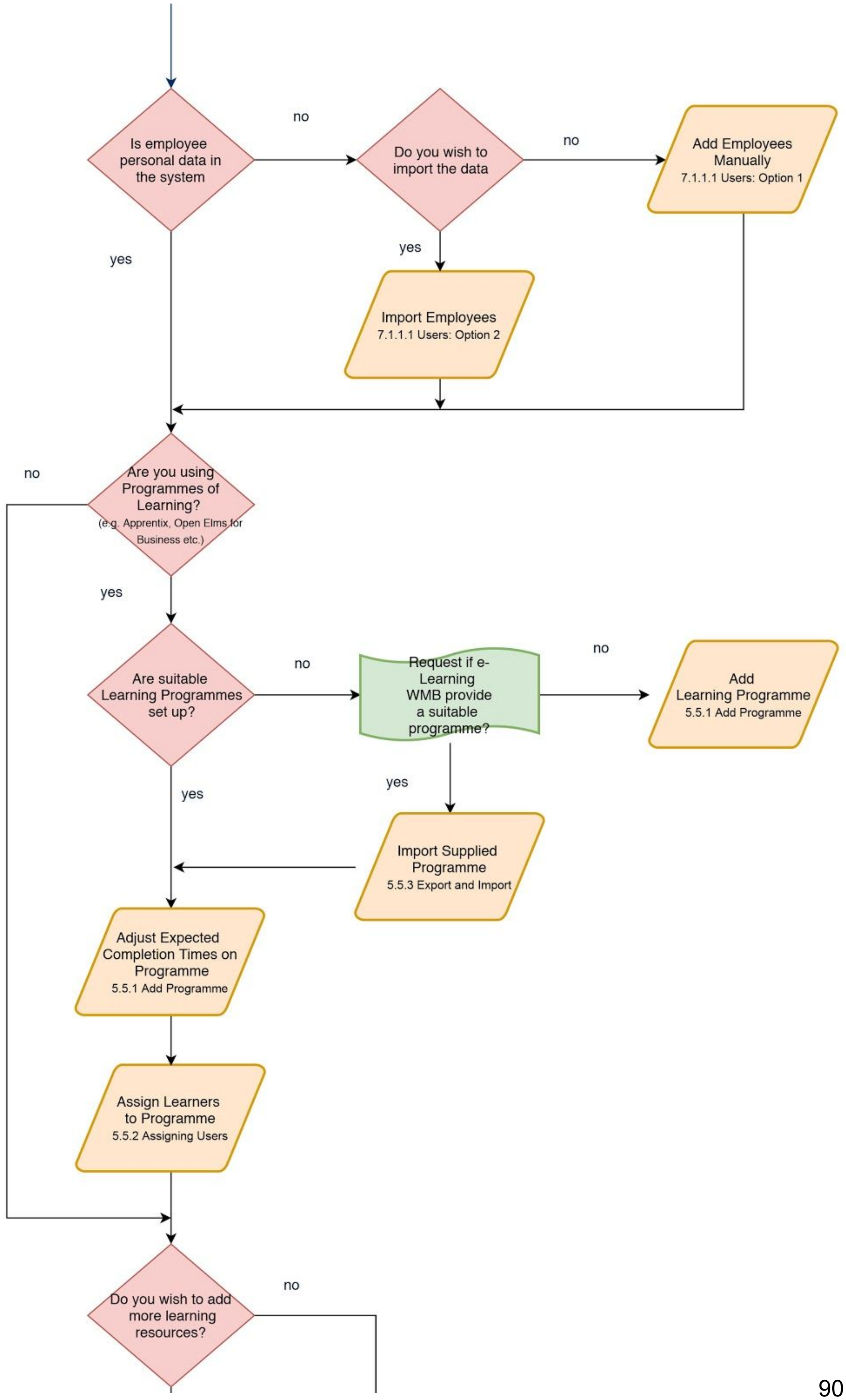
Membership includes the following:

- **e-Learning Courses** - a choice of up to 30 off-the-shelf e-learning courses. The number is growing monthly. Courses branded for each member organization
- **FREE bespoke development** - 3 free courses per year of up to 1 hour each and if the course has a general application for all our members we will develop more.
- **Jackdaw** - e-learning Content Development Software that enables your employees to develop company specific e-learning and customize any generic course.
- **Open Elms Pro / Apprentix** - Corporate business focused Learning Management System (this can be hosted with a customized login page).

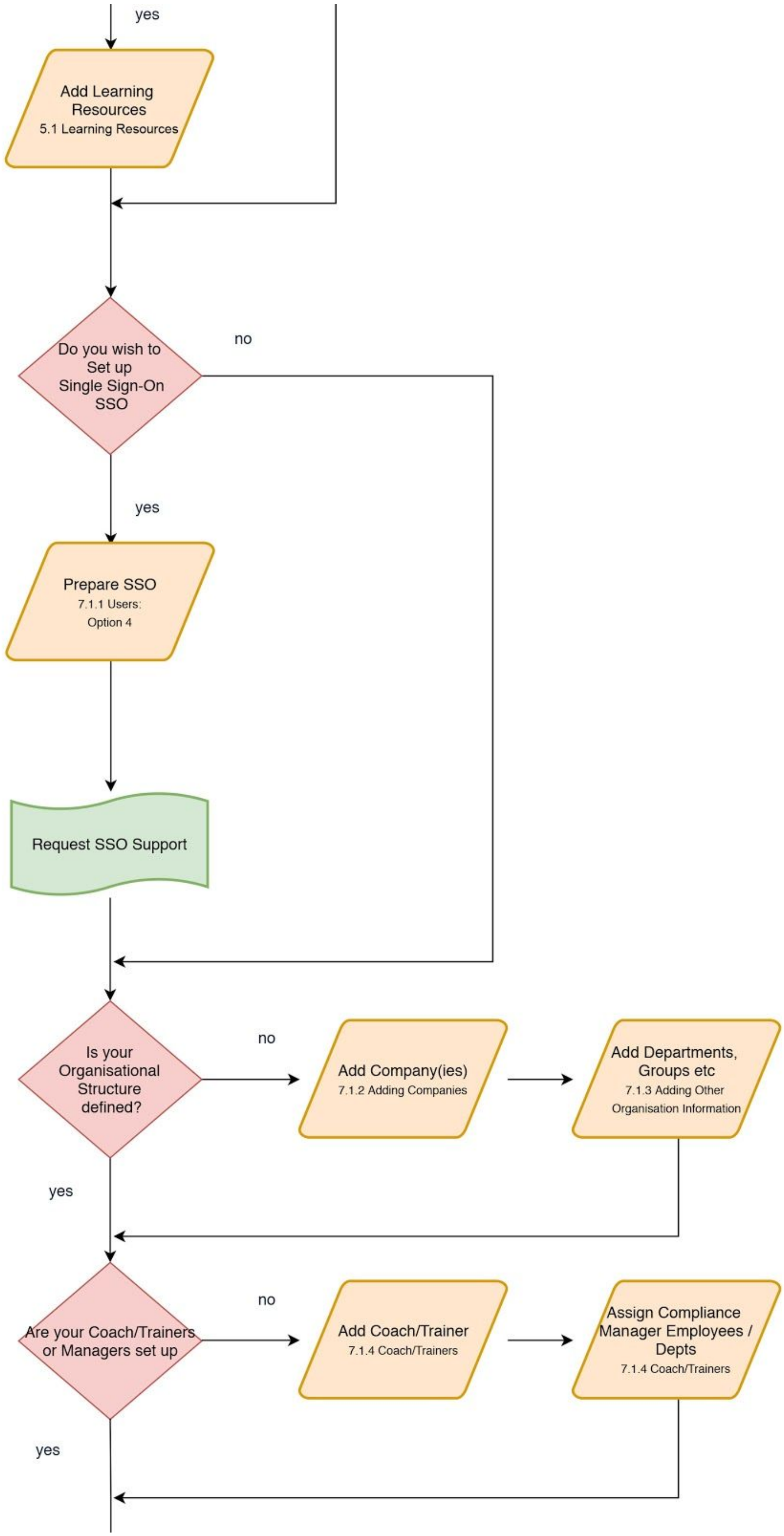
For support or a quote on any of these services contact info@e-learningwmb.com with details of your requirements.

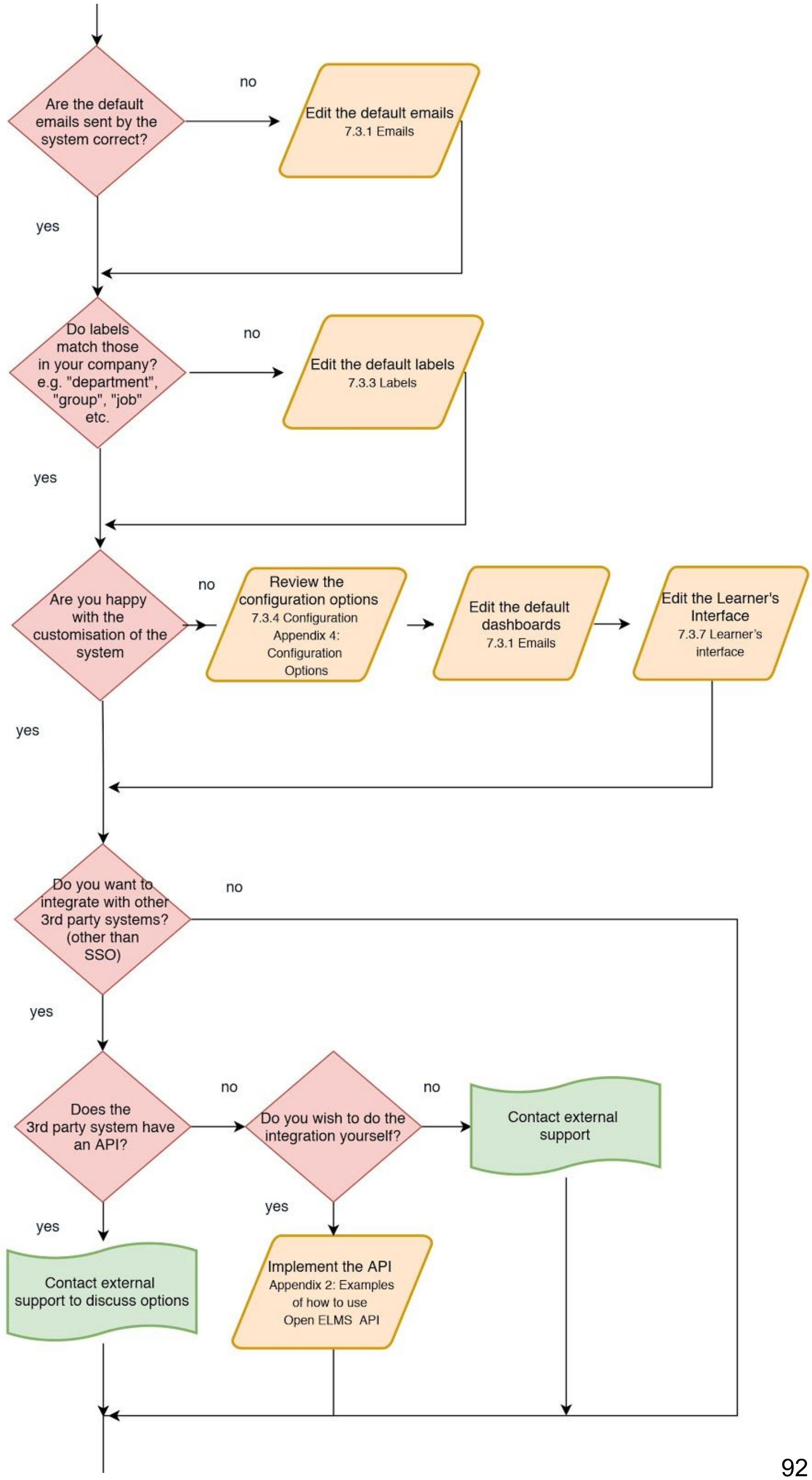
14 Onboarding the System into your Organisation

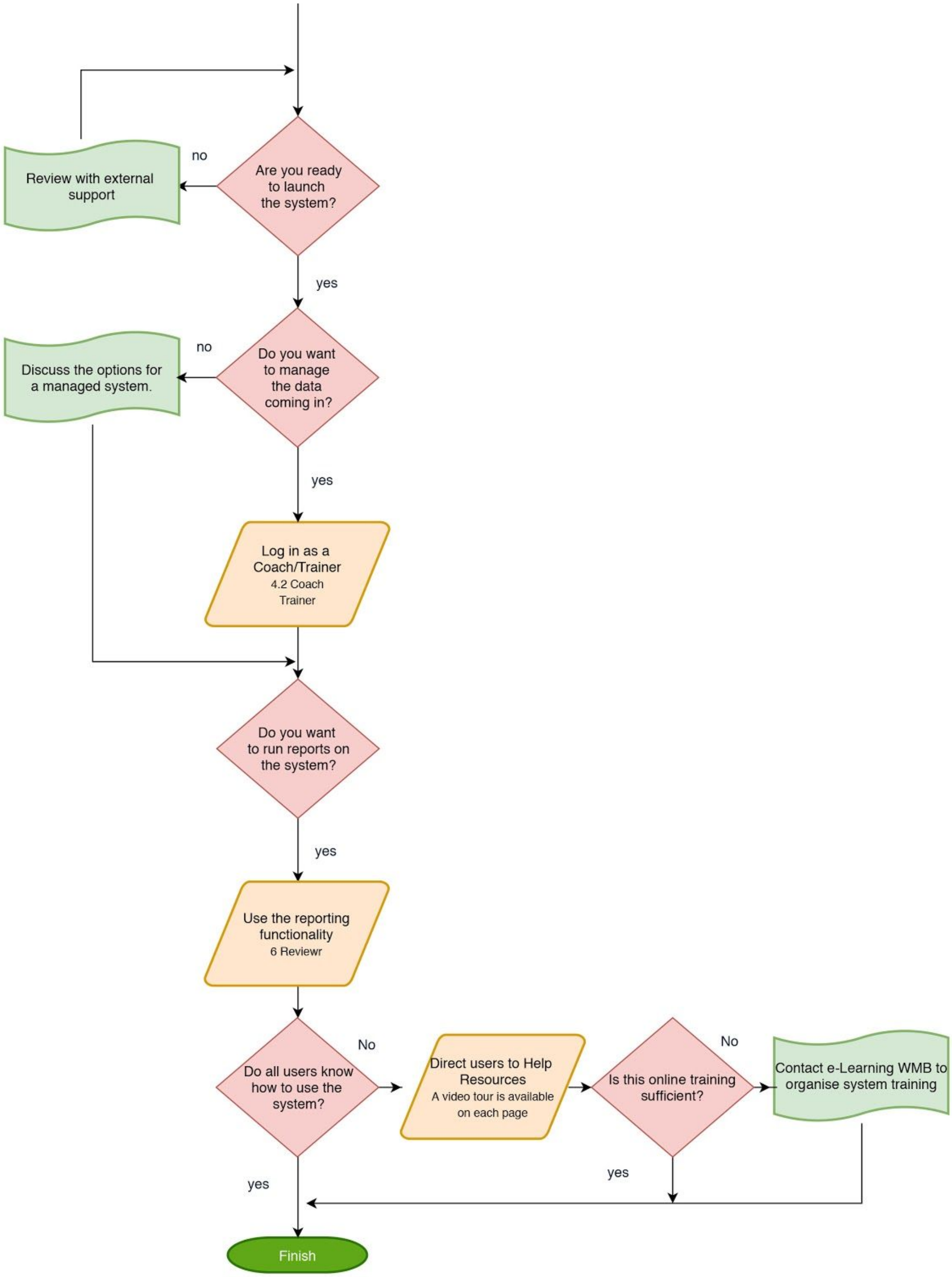

start
Is the system installed
no
Request Site Setup from Support
yes
Site Setup and URL supplied
Do you have admin access to the system
no
Request Access
yes
Administration Username/Email and Password Supplied
Log in Is the system suitably branded
no
Request Branding Support
yes
Site branded in accordance with the client's guidelines



Is employee personal data in the system
no
Do you wish to import the data
no
Add Employees Manually
7.1.1.1 Users: Option 1
yes
yes
Import Employees
7.1.1.1 Users: Option 2
no
Are you using Programmes of Learning?
(e.g. Apprentix, Open Elms for Business etc.)
yes
Are suitable Learning Programmes set up?
no
Request if e-Learning WMB provide a suitable programme?
no
Add Learning Programme
5.5.1 Add Programme
yes
yes
Import Supplied Programme
5.5.3 Export and Import
Adjust Expected Completion Times on Programme
5.5.1 Add Programme
Assign Learners to Programme
5.5.2 Assigning Users
Do you wish to add more learning resources?
no


yes
Add Learning Resources
5.1 Learning Resources
Do you wish to Set up Single Sign-On SSO
no
yes
Prepare SSO
7.1.1 Users:
Option 4
Request SSO Support
Is your Organisational Structure defined?
no
Add Company(ies)
7.1.2 Adding Companies
Add Departments, Groups etc
7.1.3 Adding Other Organisation Information
yes
Are your Coach/Trainers or Managers set up
no
Add Coach/Trainer
7.1.4 Coach/Trainers
Assign Compliance Manager Employees / Depts
7.1.4 Coach/Trainers
yes


Are the default emails sent by the system correct?
no
Edit the default emails
7.3.1 Emails
yes
Do labels match those in your company? e.g. "department", "group", "job" etc.
no
Edit the default labels
7.3.3 Labels
yes
Are you happy with the customisation of the system
no
Review the configuration options
7.3.4 Configuration
Appendix 4: Configuration Options
Edit the default dashboards
7.3.1 Emails
Edit the Learner's Interface
7.3.7 Learner's interface
yes
Do you want to integrate with other 3rd party systems? (other than SSO)
no
yes
Does the 3rd party system have an API?
no
Do you wish to do the integration yourself?
no
Contact external support
yes
yes
Contact external support to discuss options
Implement the API
Appendix 2: Examples of how to use Open ELMS API


Review with external support
no
Are you ready to launch the system?
yes
Discuss the options for a managed system.
no
Do you want to manage the data coming in?
yes
Log in as a Coach/Trainer
4.2 Coach Trainer
Do you want to run reports on the system?
yes
Use the reporting functionality
6 Reviewr
Do all users know how to use the system?
No
Direct users to Help Resources
A video tour is available on each page
Is this online training sufficient?
No
Contact e-Learning WMB to organise system training
yes
yes
Finish