CIEH eLearning Learning Management System (LMS)

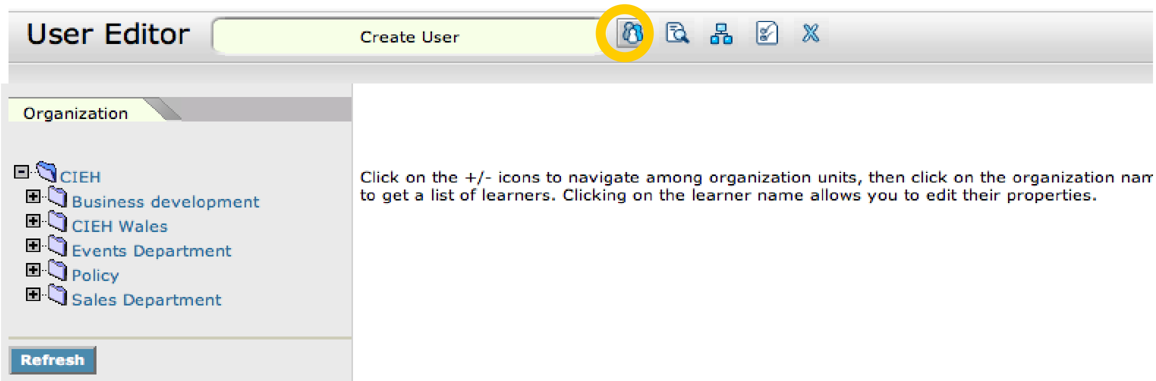
Guide for Administrators

Not sure which LMS package you have licensed? Check with your account manager or email sales@cieh-elearning.com

Standard LMS

Create new user

1. Click *Manage* menu on left-hand side
2. Click 'User Manager' in the main frame
3. Now click on 'User Editor'. A new window will open.
4. Click the Create user button at the top (see screen below)



5. Enter a User ID into the box. This is the username with which users will login to cieh-elearning.com. This ID must be unique (the system will warn you if it is not)
6. Enter a Password into the box. This should be a minimum of 8 characters long. You will need to type it into both boxes to confirm.
7. Select a profile from the drop-down box. (A profile may have been created specifically for your organisation). Leave it set as 'Default profile' if no other exists.
8. Click the 'Create User Account' button to confirm.

Editing users

1. Follow steps 1-3 above. Click on the organisation name to see a list of users (or click the cross icon to expand the hierarchy to show any further organisations / brands / departments / regions and do the same)
2. Click on the user you would like to edit. Now enter information into the fields, and once finished, click the 'Save' button at the top.

Password reminders

For security reasons, the system does not allow any user or administrator to view passwords (the password is blacked out). If a user forgets their password, they should click the 'Forgot password' link underneath the login box, and enter their email address or username. A reminder is then sent to their external email address. Administrators can also manually reset the password at any time, and email the new password to the user. Contact support@cieh-elearning.com if you require help.

Bulk upload of users

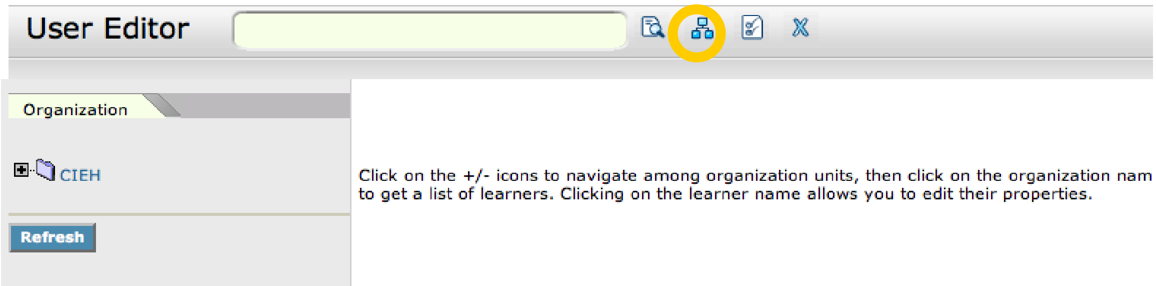
Contact support@cieh-elearning.com to request the bulk upload of users through a CSV template.

Reusing licences

Where a user has not enrolled on a CIEH course (e.g. Level 2 Food Safety in Catering) and therefore has not commenced training, the licence can be re-used. See the report section to find out how many licences are locked. Contact support@cieh-elearning.com for details.

Adding an organisation

1. Click *Manage* menu on left-hand side
2. Click ‘User Manager’ in the main frame
3. Now click on ‘User Editor’. A new window will open.
4. Click the Org Maintenance icon at the top (see screen below)



5. You will see a drop-down list of values at Level 2 (Where level 1 is www.cieh-elearning.com and Level 2 is your Organisation). Click ‘Add’ to enter a new value. (This can be anything relevant to the structure of your business from a Client name, a Sub-brand, a Region or Department.) For example, “CIEH Northern Ireland”.
6. Enter the name that is to be displayed into the ‘Description’ box. Enter a unique value into the Code box (this is not displayed, but only used by the system)
7. Select the payment plan for your Organisation from the drop-down menu. (If this is not set, licences will not be automatically allocated to any users you create under this Organisation)
8. Leave all other selections unchanged. Click the ‘Save’ button at the top (the disk icon) to submit

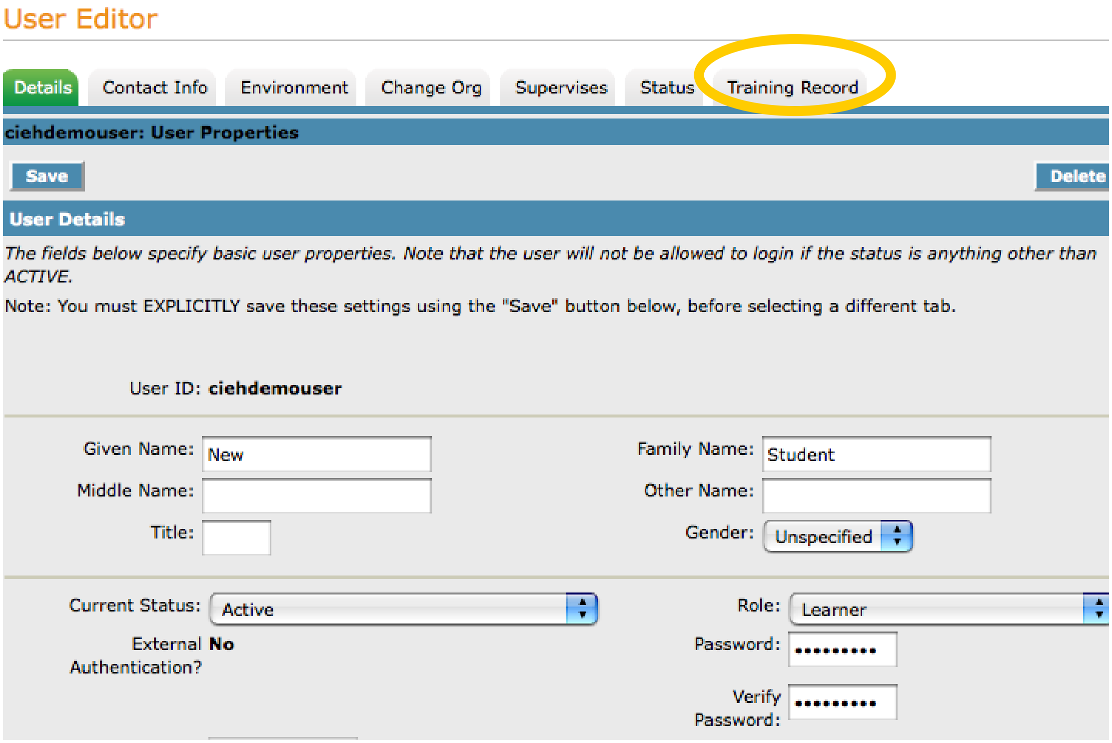
Editing an organisation

1. Click the Manage menu of the left-hand side
2. As before, click ‘User Manager’ and then ‘User editor’ in the main frame.
3. In the new window, click the Org Maintenance button at the top.
4. A list of Organisations appears in the Level 2 drop-down menu. Select the value you wish to edit from the list, and then click the ‘Update’ button.
5. Enter information into the boxes, and then click the “Save” button at the top to confirm your changes

Enrolling on a course

1. Go to the Manage menu, click ‘User Manager’ and then ‘User Editor’
2. Browse to the organisation, and click on the user name

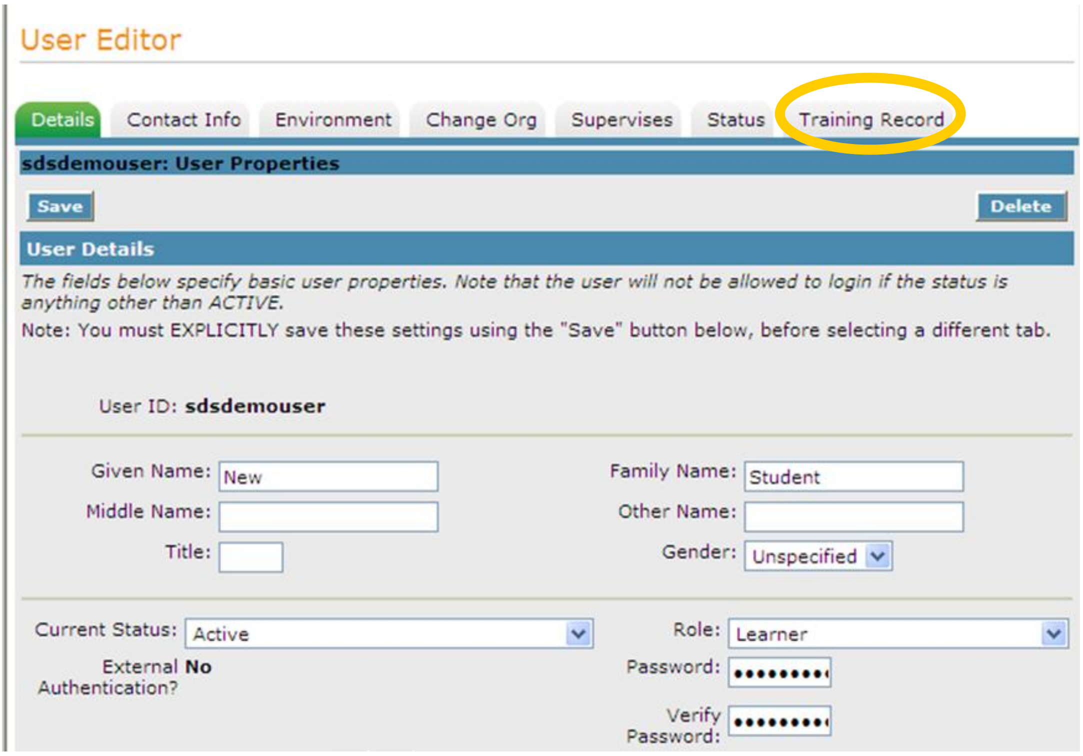
3. Go to the ‘Training Records’ tab at the top. (See below) A new window will open.



4. Click on the ‘Assign Learning Module’ tab on the right.
5. Enter a keyword to identify the course you would like to assign. (For example, type ‘food’ to find the Level 2 Food Safety in Catering course). Click the ‘Search’ button to see a list of courses.
6. Select the course you wish to assign to the learner. A new window appears.
7. Now click the ‘Assign’ button, and then ‘Confirm enrolment’ when asked to confirm.

Creating a training plan

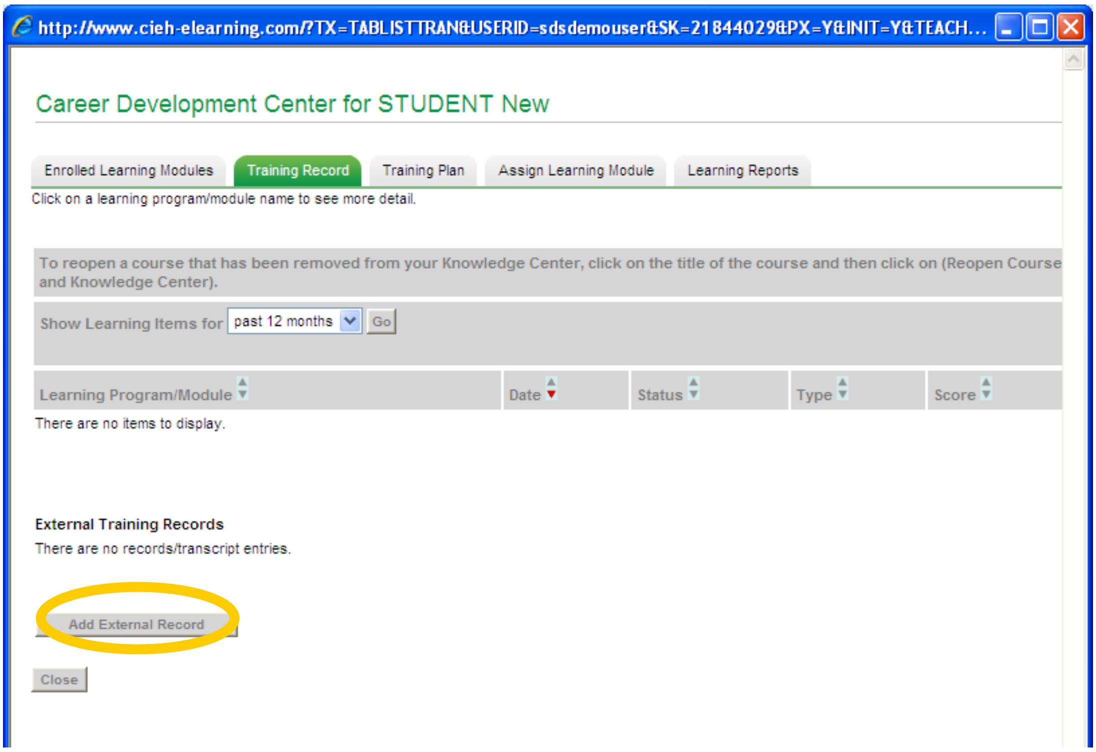
1. Click on the Manage on the left-hand menu
2. Go to ‘User Manager’
3. Click on ‘User Editor’. A new window will open
4. Navigate the hierarchy on the left menu to find the learner, and click the link to edit details.



5. Click the ‘Training Record’ tab. (See screen above). A new window will open.
6. Click the ‘Training Plan’ tab at the top.
7. Click the ‘Add new entry’ button.
8. Enter a course in the Title tab. Click the ‘Select’ button, then enter a search term to find courses that may be relevant to the learner. Click one from the list and use the down arrow to add it to the record and click ‘OK’.
9. Enter a text description. This could be any pre-requisites for the course, the reason for assigning the course and any follow-up steps planned.
10. Set the priority (low, medium, high)
11. Set a Complete by date. This date will appear in the learner calendar to remind them that they must complete the course by this time.
12. Click Save Suggestions.

Adding external training records

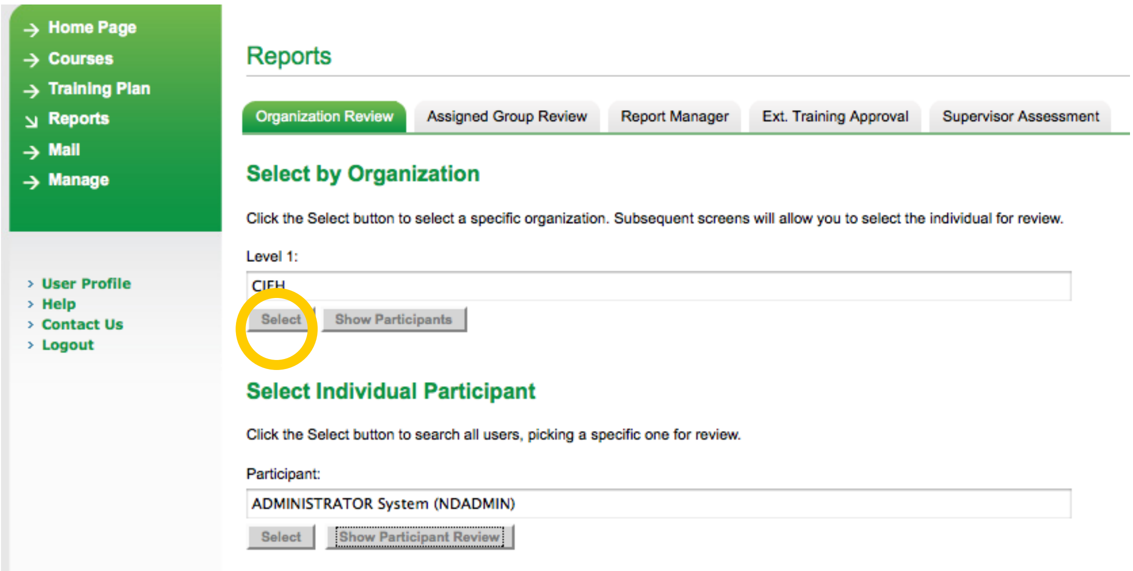
1. Follow steps 1-5 as above.
2. Click ‘Training Record’ tab at the top.



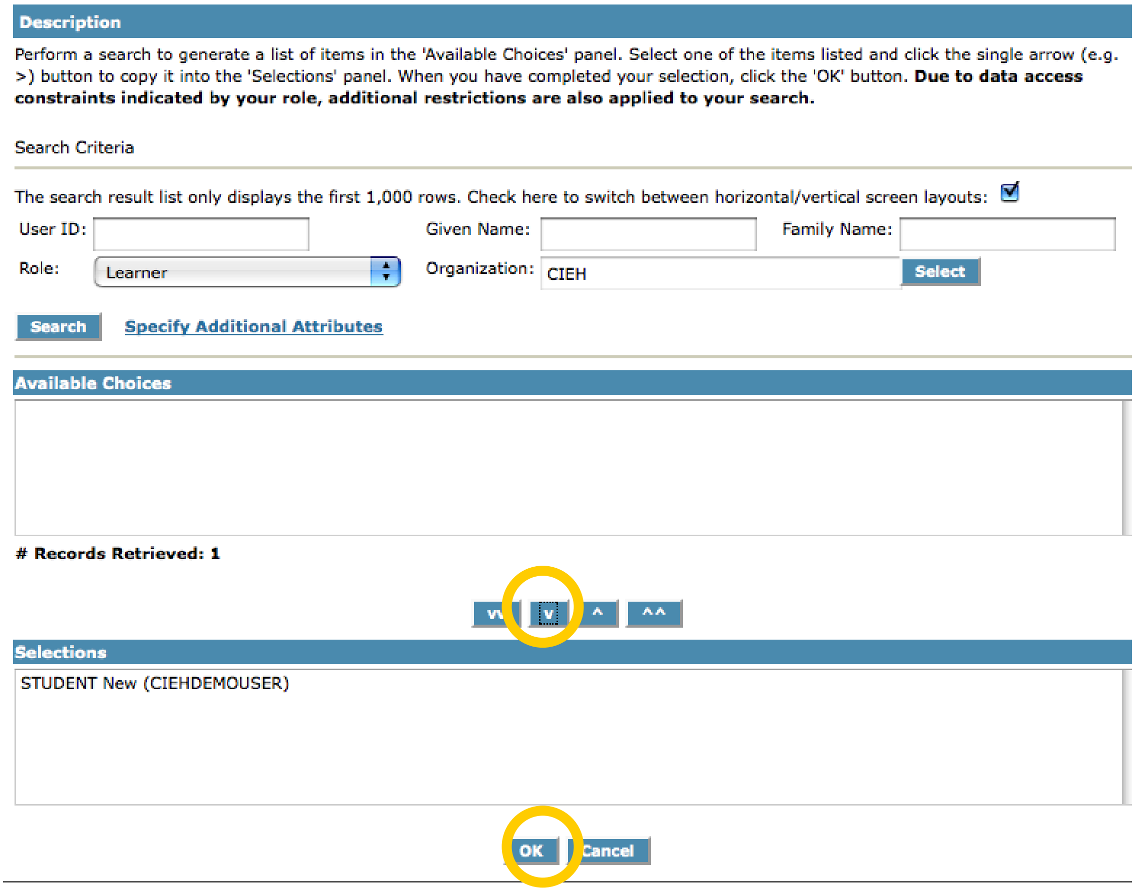
3. Click the 'Add External Record' button at the bottom.
4. Enter a title for the Training Record. (A Training record can be for online learning completed in any system, or offline training completed. You could import old training records from an obsolete HR or Training database and track everything through the LMS)
5. Enter a course type from the drop-down (e.g. Classroom, online, etc)
6. Enter the start and end dates for the course, if relevant
7. Enter the venue if relevant
8. Enter the duration if known
9. Enter cost information, grade and score if relevant, vendor information or leave blank
10. Enter comments about the training (For example, the reason for doing the training, whether the training should be refreshed, etc)
11. Set the status. (This is useful for adding an 'Approval' step, for example where a learner enters their own training record, but a manager must conform the training was completed). Select 'Complete' from the drop-down.
12. Click the 'Create' button at the bottom to save the Training Record.

Running organisation reports

1. Go to the 'Reports' menu on the left-hand side.
2. For quick summary report for your organisation, click the 'Select' button underneath the heading 'Select by Organisation'. Browse the hierarchy, and tick the box next to the organisation(s) you want to include. Now click 'Show participants' to see a list of users for that organisation.



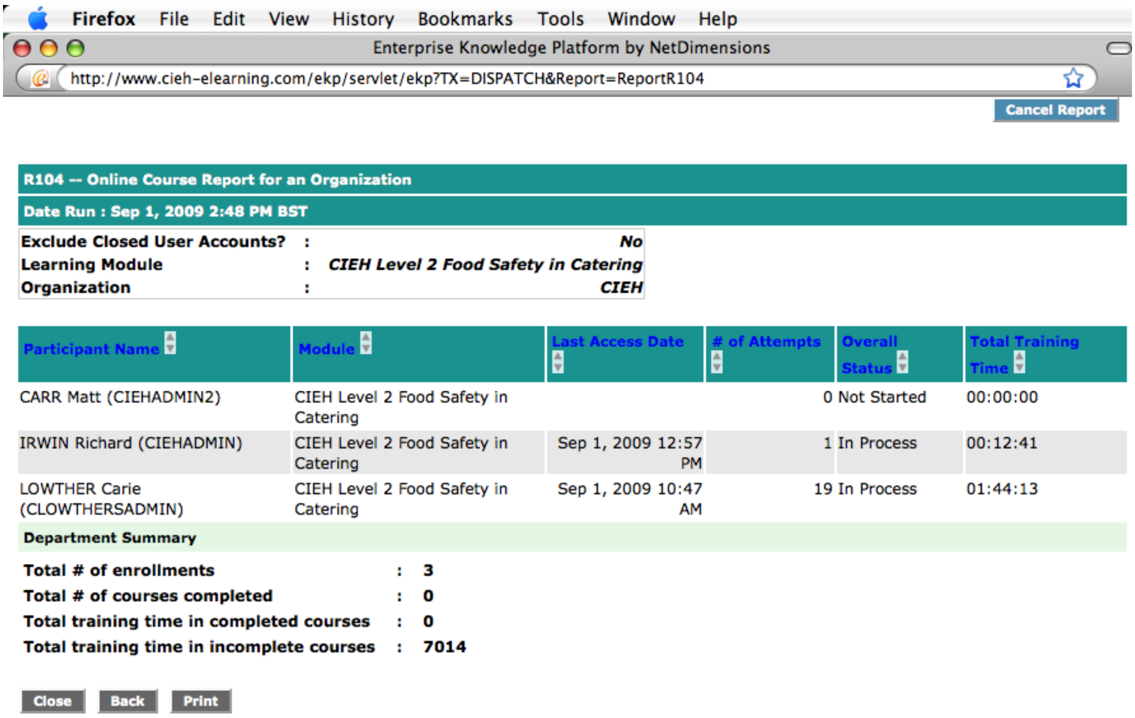
3. For a quick summary report for a particular user, click the 'Select' button underneath the heading 'Select Individual Participant'. Enter a search term such as 'food' and click 'Search' to see a list of courses, now select a course and click the down arrow to add it to the active selection box at the bottom, before finally clicking 'OK' to confirm.



4. For more detailed reports, go to the 'Report Manager' tab at the top.
5. Click 'Organisation reports'.
6. All reports require you to enter an Organisation name and/or Learning Module. Click the linked word 'Organisations'. Now browse the hierarchy and tick the box next to any organisation(s) you want to include, the click OK. For Learning object, enter a search term

such as ‘Food’ and click ‘Search’ to see a list of courses, select a course, and use the arrows to paste into the bottom box, then finally confirm by clicking OK.

7. Scroll to the bottom and click ‘Run now in browser’ to view the report online.
8. To create the report in a different format, or download it to your PC, change the output options at the top. CSV is recommended, since this format can be understood by all versions of Microsoft Excel, also imported into other programs, e.g. Access DB. Now go back to the bottom, and click ‘Run now in batch reports’.
9. **Tip: You will find the following reports useful:**
    - **i. R104** - Shows courses, name, last accessed, number of attempts, status, and total time spent, and a total of enrolments.
    - **ii. R107** - Shows courses, name, start and finish date, status, score, and organisation by learner.
    - iii. **R109** - Shows ALL data relating to users within the system, for example, username, full name, job title, email, organisation, licence status (active, deactivated), city, country etc.
    - iv. **R102** - Shows name, courses, start and finish date and organisation, grouped by learner.
    - v. **R101** - Shows name, courses, start date, organisation, number of credits (licences) used and payment plan [if relevant]



Running learning reports

1. Follow steps 1 above. Follow step 2 for quick summary reports. For more detailed reports, go to the ‘Report Manager’ tab at the top.
2. Click ‘Learning Reports’.
3. Click the notepad icon next to any description to run that particular report.
4. All reports require you to enter an Organisation name and/or Learning Module. Click the linked word ‘Organisations’. Now browse the hierarchy and tick the box next to any

organisation(s) you want to include, then click OK. For Learning object, enter a search term such as ‘Food’ and click ‘Search’ to see a list of courses, select a course, and use the arrows to paste into the bottom box, then finally confirm by clicking OK.

5. Scroll to the bottom and click ‘Run now in browser’ to view the report online.

a. To create the report in a different format, or download it to your PC, change the output options at the top. CSV is recommended, since this format can be understood by all versions of Microsoft Excel, also imported into other programs, e.g. Access DB. Now go back to the bottom, and click ‘Run now in batch reports’.

6. **Tip: You will find the following reports useful:**
    i. **R207** - Shows total number of enrolments, and total number users accessed/started the course
    ii. **R202** - Shows course, name, job title, organisation, country, course status by learner
    iii. **R220** - Shows the number of active licences (course enrolments, course started – by token) by learner
    iv. **R223** - Shows name, course, first and last access date per learner, grouped by status (e.g. not started, in progress, complete)
    v. **R235** - Shows learners not enrolled in a particular course

Printing training records

The learner can go to the ‘Training records’ tab at any time to print their own training record. Click the ‘Print Training Records’ button at the bottom.

Administrators can print any Training Report, by clicking ‘Print’ at the bottom of the page. To print the training record for a particular learner, go to their Training Record (Manage menu, User Manager, User Editor, and select the learner from the list, and click ‘Training Record’ tab at the top) and then click ‘Print Training Records’ button at the bottom of the page.

Advanced LMS

Note all of the features listed under the ‘Standard LMS’ are available in the advanced LMS package. See sections above for details on basic tasks such as creating users, running reports, creating training plans.

Adding branding

Any corporate brand guidelines, company logos, banners and other images can be used to customise the interface. Contact support@cieh-elearning.com to request creation of a new ‘Skin’.

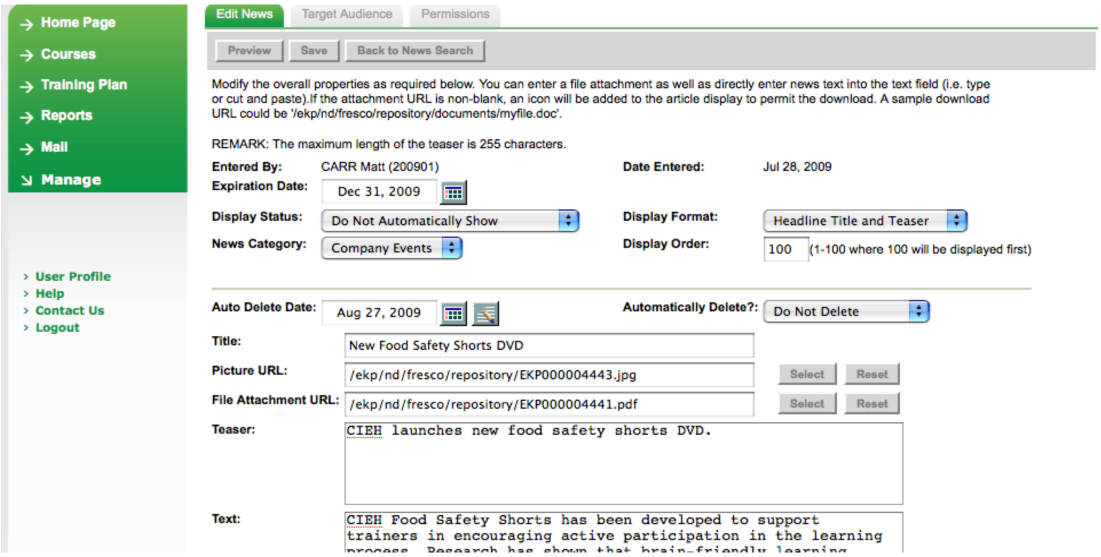
Selecting a skin

Different skins can be set for separate sub-brands, clients, or regions. Contact support@cieh-elearning.com to request creation of a new ‘Skin’ or to set the skin for all users within a specific organisation.

Creating news items

1. Click *Manage* menu on left-hand side

2. Click *News Manager* in the main frame
3. Click *News Search and Maintenance* in the main frame
4. Click the *New Article* button
5. Enter details into the web form to create your News Item



a. Set an *Expiry Date* if news is date specific e.g. a particular event (or leave blank)
b. Set the *Display Status* to '**Automatically Show Until Expiry**'. Your news item will not appear unless you remember to change this. Note you can leave it to 'Do Not Automatically Show' if you want to create a news item in preparation for an event, and then display it later.
c. Set the *Display Format* which is set to 'Headline Title and Teaser' by default. You may want to have just the Title appear, or the Title and Content if you want the full text and download available on the homepage.
d. Set the *Display Order*. This is 50 by default, you can set a value of 100 if you want the item to appear before others.
e. Enter your *Title*, for example "New Food Safety Shorts DVD"
f. Select a *Picture URL*. This is the image that appears for your news item on the homepage. It should ideally be a 150x150 pixel gif or jpeg. (Although you can use any size of image and it will automatically be resized as a thumbnail, and display at original size on the News Item). Click on the appropriate Folder within *Repository Manager*, and tick the checkbox next to an image to select it. Alternatively click the 'Upload' button and browse to select the file from your system first, upload it and then tick the checkbox to select it.
g. Set a *File Attachment URL*. This can be any format of file, which will then appear as a 'Right click to download' link within your News Item. (For example a PDF, Word Doc, Powerpoint, Excel File, Video - MP4, Mov, AVI etc - or Audio - MP3, Wav - and more.)
h. Enter *Teaser* text. This displays below the Headline and Image when the user mouse-over the News Item.
i. Enter *Text.* This is the text that appears when the user clicks the News Item and views the News Page. You can also enter basic HTML into this text frame, for example additional links can be expressed as

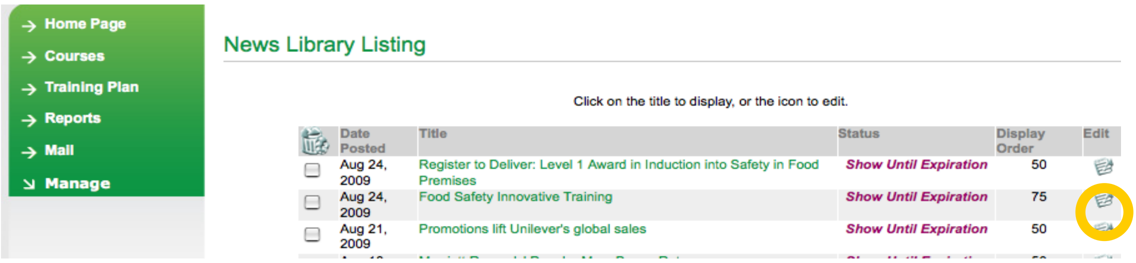
Visit the CIEH website

j. Click 'Save' (or Preview first, make changes and then click Save)

6. Now select the target audience for your News Item. Click the 'Target Audience' tab at the top.
   a. Click the 'Organization' link. Tick the box next to the Organization you want the News Item to appear for. You can further click the Cross icon to expand the Organization, and if appropriate select a sub-group, such as a particular Department, Region, or Client for example 'CIEH Wales'.
   b. Add additional criteria from the boxes as required. For example, if you click *Course* and add 'Level 2 Food Safety in Catering', only those users who login from CIEH Wales AND are enrolled on this course will see your targeted News Item.

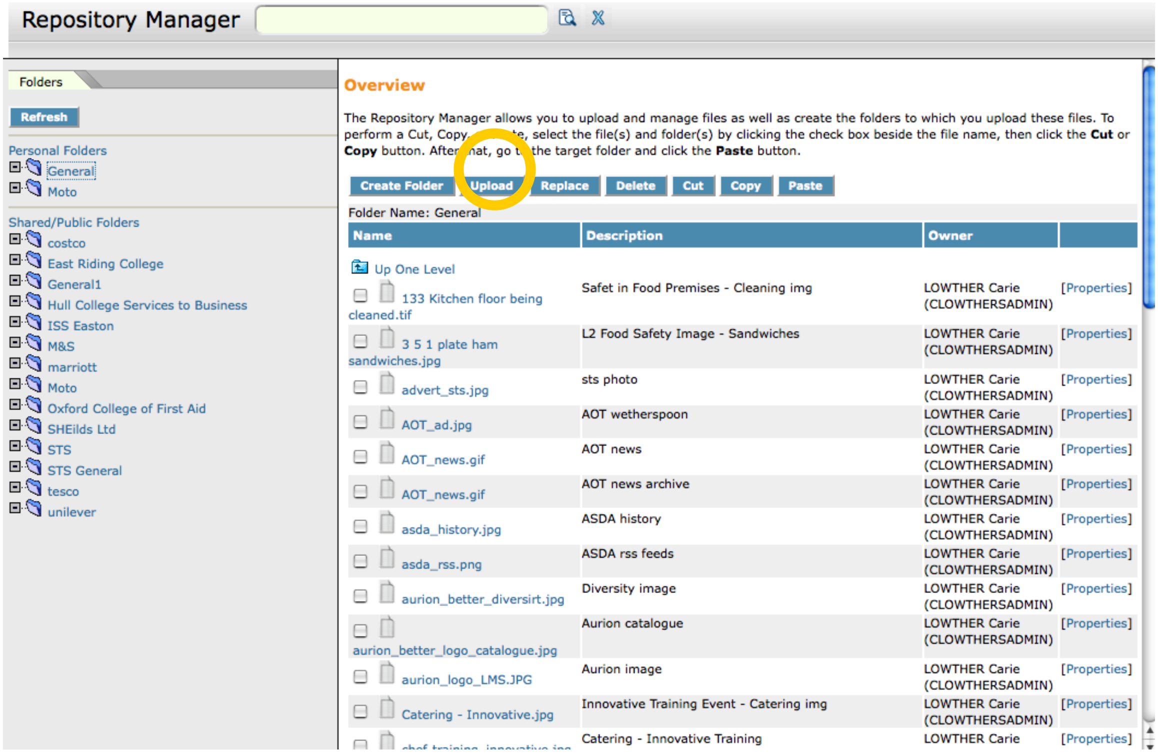
Editing news items

1. As above, Click *Manage* menu on left-hand side.
2. Click *News Manager* in the main frame
3. Click *News Search and Maintenance* in the main frame
4. Now click 'Search' to see a list of news items already created.
5. Click the Edit icon on the right, to start using the same web form to Edit your News Item.



Uploading resources

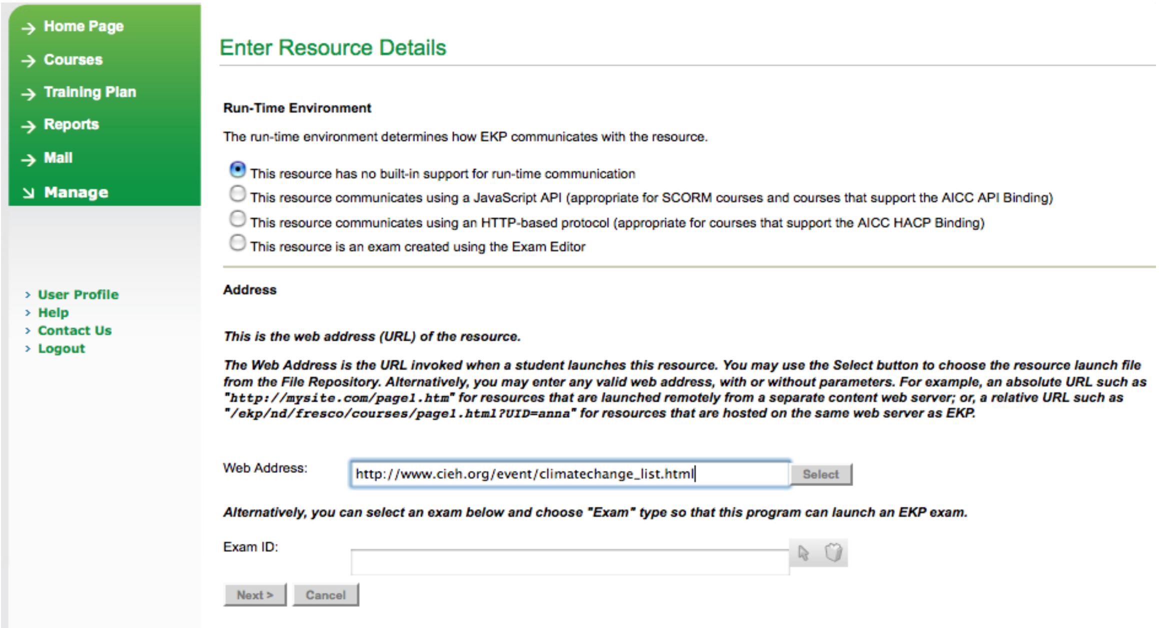
1. Go to Manage menu
2. Click 'Repository Manager'. A new window will open.
3. Select an appropriate folder. (Click the 'Create Folder' button to create a new Folder)
4. Click the 'Upload' button at the top.



5. Click the ‘Browse’ button to the right of the box to navigate to, and select the item you wish you upload. This could be a PowerPoint, Word Doc, PDF, Spreadsheet, Movie or Audio file – almost any type of file except executables or anything above 200MB.
6. Now enter a description. This is the text that appears next to the filename in the Repository manager folder listing.

Creating a web course

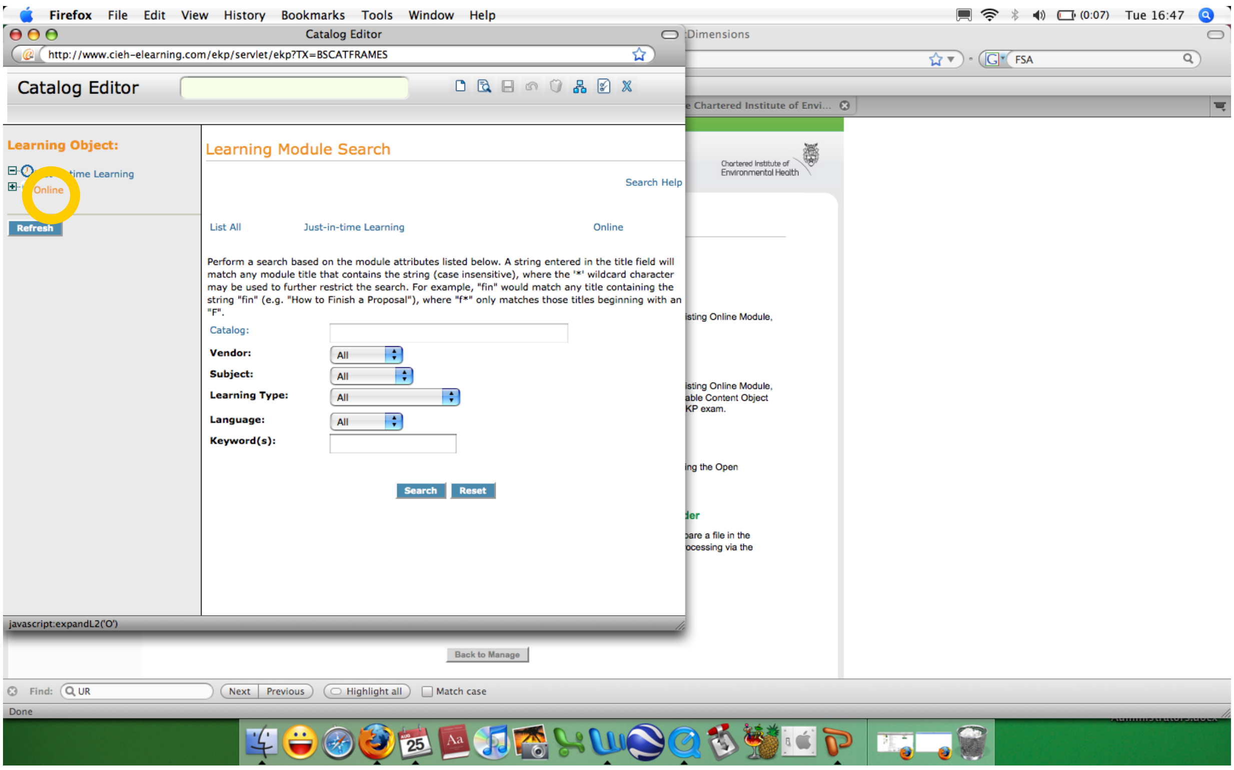
1. Go to Manage menu and click ‘Catalog Manager’
2. Click ‘Import Resource’



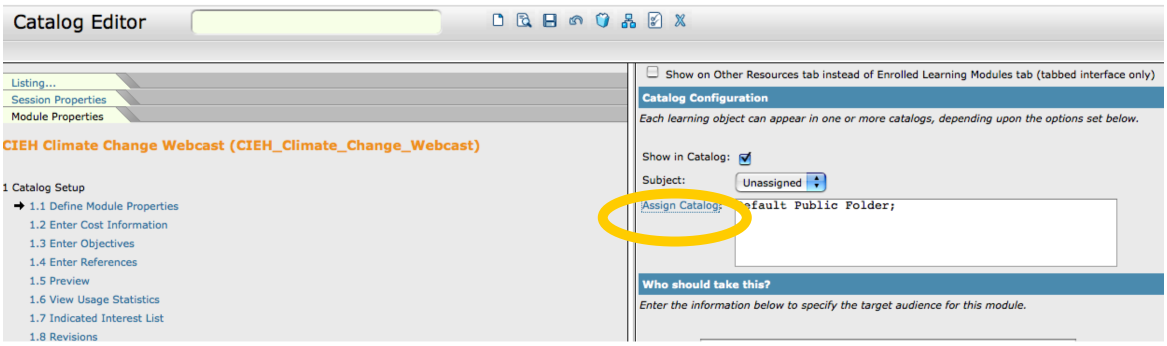
3. Enter a website URL into the Web Address box. (This can be any web page or file. Therefore a ‘course’ could become any learning resource - whether a news website, PDF policy document, or Flash application, such as the FSA ‘Stack our Fridge’ game at: http://www.glasgows.co.uk/fsa_interactives/FrdgLoad.swf). Click ‘Next’ to continue.
4. Now enter a Course Name. This is the name that will be displayed to users. For example, “CIEH Climate Change Webcast”. Click ‘Next’ to continue.
5. Now enter a Course ID. This uniquely identifies the course within the LMS but is never displayed to users. For example, “CIEH-webcast1”.
6. Tick the ‘Show in Catalogue’ box to make the course visible to users. (If you prefer to import a resource, and test it with specific learners before making it publicly available, leave this blank.) Now click ‘Import’.
7. Click ‘Open Catalogue’ editor to add extra details for the course. For example, you can enter a detailed description, course objectives, and add an image for the course. See the next section for details.

Edit a course

1. Go to ‘Manage’ menu.
2. Click on ‘Catalogue Manager’
3. Now click ‘Catalogue Editor’. A new window will open



4. In the left-hand menu, click ‘Online’. A list of courses will appear underneath the cross icon and Online link. Select the course you wish to edit.
5. Enter relevant information about the course in the ‘Description’ field on the right. This will appear as the ‘Teaser’ for the course on the homepage, so keep the first paragraph short (1 or two lines) then hit enter to create a line break before entering further information.
6. Enter a ‘More information hyperlink’. This is a web address such as http://www.cieh.org. Use this to link to further information on other websites (for example the CIEH syllabus).
7. Scroll down to Catalogue Configuration. Check that the ‘Show in Catalogue’ box is ticked. Click ‘Assign Catalogue’ if you wish to assign the course to a new catalogue. (Courses are assigned to the ‘Default Public Folder’ automatically).



8. Under Resources Assignment, set an image for the Course by clicking the Arrow icon to the right of the box. Use the Repository Manager as described in the previous section.
9. Now click the Save icon (Disk symbol) at the top of the page to save your changes.

Creating custom reports

Use the 'Report Wizard' feature to create your own custom reports. For training on how to use this feature, contact support@cieh-elearning.com to arrange a site visit or Webex remote session.

Sending mail messages

If you wish to send messages from the internal 'Mail' feature to an external mail address (e.g. address@cieh.org) you will need to ask your IT administrators or ISP to add www.cieh-elearning.om to their allowed list of servers, on the SPF record. This means that messages will not be deemed as Spam, or blocked because they are not from a trusted source.

Contact support@cieh-elearning.com for information on set-up and training on how to use this feature.