EDUBRITE

Quick Reference Guide for LMS Administrators and Instructors

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I. Basics

Personal & Business Editions

EduBrite offers two flavors of training products. Personal edition is suitable for individual trainers or small teams with infrequent training and assessment needs. Business edition is for training companies, small-mid size businesses or teams in large businesses. You can start with either of them.

Microsite (Business Edition)

Each microsite (or site) has a unique URL (e.g. acme.edubrite.com). Each site has several configuration settings to control its security, user interface, feature and integration.

User

Each site has one owner (who created the site). Site owner can create more users. Users can also self-register, if that option is enabled in the site. If using Gilly, users can get implicitly created when they access their training dashboard from Confluence.

Role

Each user in the site can have administrator, instructor or learner role. Site owner remains as the superadmin in the site.

Group

A site can have many groups, which can be used for grouping people, resources (courses and tests) and training programs.

Group Role

Users also have a role in each group they are member of. Each group has an owner, multiple admins, instructors and learners.

Group Security/Properties

A group can be made publicly visible or kept private. Only group members can access group resources, but group owner/admins can setup various policies at group level.

Collaboration

Group members can post topics in group's forum, create short polls to take other member's opinion, post short updates and share resources (articles, files) with other members.

CMS

Content management allows you to create custom homepage and additional pages in your microsite. You can create and edit content and publish.

Test

Test is collection of questions. You can create tests and specify additional properties such as scoring criteria, timing, randomization etc. Test is a reusable resource, which can be delivered in multiple ways.

Exam

Exam is a scheduled event, which can consist of one or more tests. Exam has a specific start date and end date, and can be assigned to specific candidates. A candidate is allowed to have only one attempt on any test in an exam. But a test can be scheduled multiple times to create multiple exams.

Course

A course is a collection of content items and tests. Content items are called **Lessons**, which can be created from existing files (PPT, DOC, PDF, Audio, Video), external video resources (YouTube, Vimeo) or using online editor. Lessons can be organized into hierarchical folders called **Modules** (*top level folders*) and **Topics** (*folders at other levels*). Lessons inside a module or topic are arranged sequentially. A module or topic can also have tests, which are placed right after all the lessons. Course is a reusable resource, which can be delivered in multiple ways.

SCORM

SCORM is a standard by ADL, which provides standard based packaging of learning content. EduBrite allows you to upload the packaged SCORM modules in courses, just like lessons.

Course Session

Just like relation between test and exam, Course Session represents a scheduled course, which has a start and an end date. To assign a course to learners, you need to add them as a member to any Course Session. A course session can also have members with instructor role. The role is specific to a course session.

Program

Program is a collection of courses, which can have interdependencies specified via pre-requisite. Each course in a program can have credits, and program can specify a minimum credit, which learners have to get in order to complete the program. A course can be part of more than one program. *Normally for simple usage, you never have to create a program as you can directly schedule a course to create course session.*

Program Session

A program can be scheduled for a specific period and that instance is called a program session. A program session is a collection of course sessions, where each course session belongs to one of the courses existing in the program, and starts and ends within the period specified for the program session.

Enrollments

Instructor or admin can enroll learners in any course session or program session. Enrolling in program session effectively enrolls the learner in each course session, which are part of that program session. Self and paid enrollment can also be enabled for specific course session or program session.

Instructor Led / Blended trainings

Each course session can be configured to have additional features such as exams, events, forum, poll and assignments. Instructors can also share resources (articles / files) with learners in addition to having the base content already packaged as part of the course.

Assignment

Instructors can give specific tasks to learners or a sub-group in a course session. These tasks have a start and end date within which learners have to complete the task. Instructors can provide details of assignment by adding content items. Learners can complete the assignment and submit their work for evaluation.

Grading

Grading policies allow creation of custom grading rules and weighted categories to evaluate learner's activities in a course session. Default grading rules provide a common grading mechanism suitable in most cases so you don't typically need to configure them, but you have an option anyways.

Certificate

Each course session can provide a certificate to learners upon successful completion of the course. Certificates are also available upon Program completion. Certificate consists of a downloadable PDF generated using a template. Custom templates can be created in microsite to have custom design.

II. Creating Tests

1. **Start**
   - Launch editor from Test->Create Test
   - Enter name, number of questions and duration. If you are creating survey, then select survey option
   - Click Save button
2. **Adding Questions**
   - Click button to add questions, select specific type from the drop down menu
   - Click on the inserted question text and you can edit it. Use or buttons to add or delete choices
   - To change question's sequence, use or buttons
   - To insert an image, first upload the image for any question, by using button. Then place the cursor where you want to insert it, and click the button again to select the image from the list and insert.
   - You can also import questions from other tests by clicking on icon.
3. **Adding Passage**
   - Passage holds common text for set of following questions
   - Go to the first question for the passage
   - Click button to add passage element
   - Specify number of questions for this passage
4. **Scoring**
   - Common points and penalty points for every question in the test and passing score can be entered from the Properties tab
   - To override the points for specific passage and/or question, select the Test Content tab and click on specific question/passage, and enter the points
   - If you have grid type questions (HGR, HGMR, VGR, VGMR) you can also specify % weights for each choice in the question
5. **Properties**
   - From the properties tab you can enable randomization options
   - Pause option can be enabled to allow test taker to pause and resume the test anytime.
   - Result visibility can be set to control how much result details are visible to test taker after the test
6. **UI Options**
   - Set additional options like prevent back button, make all questions mandatory, number of questions on each page from the UI Options tab
7. **Ownership**
   - Go to the authorization tab to change the owner of the test. Owner can be a user or a group.
   - If a user owns the test, no one else can edit it. Group owned tests can be edited by anyone who is admin or instructor in that group
8. **Authorization**

   Site level: test is preview-able which means anyone who is a valid user can take this test, anytime, any number of times

   Private: test is preview-able for group members of the authorized groups. If no group is selected then test can be taken only via a scheduled exam or as an embedded test in the course [*most common recommended option*]
9. **Solution**

   To enter question specific solution open any question and click on icon.
10. **Publish**
    - Once everything is set, you need to publish the test, click on button from the toolbar. Only published tests can be scheduled or added in course.

III. Creating Exam

1. **Start**
   - You can schedule the test from test editor or test list page by clicking on button
   - Enter the exam start date and number of days it is available for
   - Enter the specific group (optional) or course session (optional) to determine who can take the exam
   - Enter the access level Open (*learners can self enroll*), by invite (*you will assign learners*) or paid
   - If the exam is being created for a course session, it can be chosen to act as a *course completion exam*, which would determine completion status of learners.
2. **Adding Candidates**
   - Once you save the exam details, you will see a button to Add Candidates
   - If the exam is paid or Open, candidates will be able to self enroll
   - If the exam is for a course session, all learners in course session get enrolled automatically
   - Otherwise you can add candidates by selecting users from the microsite or from the group where exam is created
3. **Emails to Candidates**
   - You can choose to send email notifications to candidates while adding them
   - You can also send emails later on from the Candidates tab of the exam details
   - Email contains a link to the exam
4. **Emails to admins**
   - You can choose to send email notifications to admins when any candidate starts or completes the test by enabling notification options while creating the exam or by editing it.

IV. Tracking Results

- Open exams list page from Tests->Scheduled Tests
- Exams are also listed in My Items->Calendar
- Group specific exams are listed under the events tab in Group details page
- Course session specific exams are also listed on the course session details page
- Open the specific exam details and go to Results tab
- You can view every candidate's attempt details
- You can give extra time or allow re-attempt to specific candidate from the list (as long as the exam is not Finished)
- You can go to the Reports tab and access additional downloadable reports (CSV and PDF format)

V. Manual Scoring

- If the attempted test consists of any Essay type questions, it would be put in pending-evaluation status, until an instructor or exam admin opens the particular test attempt details and adds the scores for essay questions and finishes the evaluation.

VI. Creating Courses

1. Start

- Launch editor from Course->Create Course
- Enter course name, and select other options relevant for the course and click Save button
- A New module is auto inserted, just click Next button to add first lesson

2. Adding Presentations

- Select the first lesson type option
- Drag and drop Powerpoint file next to the Upload button, or click Upload button and select the file
- For best result upload PDF instead of PPT/PPTX (*some PPTs don't get converted properly by our converter, but pdfs are always converted accurately*)
- Go to the properties tab, and rename the lesson

3. Audio/Video

- Select the third lesson type option
- Drag and drop MP4/FLV/MP3 file next to the Select File button, or click Select File button and select the file
- Go to the properties tab, and rename the lesson

4. Adding voice/video for slides

- Select any Doc/PPT/PDF/Online Content lesson, go to Video/Audio tab
- Drag and drop MP4/FLV/MP3 file next to the Select File button, or click Select File button and select the file
- Go to Timing tab
- Enter Lesson duration and check Enable Slide timing
- Enter time for each slide

4. Adding online edited lesson

- Select second option in the lesson type selection dialog
- You can enter content in the WYSIWYG text editor. You can also add images in content by using icon in editor

5. Adding SCORM

- Right click on the course, or any module and click on Add SCORM
- Select the SCORM zip file, or just drag and drop it next to Select File button
- Or, link to previously uploaded SCORM file by using Link option

5. Adding Quiz (Test)

- Right click on any module and click on Add Test
- Click on Select already published Test and pick a test from the list
- You can enter number of attempts allowed for the test (optional); by default there is no limit on attempts.
- Attempts would be counted for any learner enrolled in a course session

6. Link to existing lessons / SCORM

- You can also add a lesson or SCORM in the course, which just links to a lesson or SCORM in an existing course.
- Courses for which Shared Resource property is enabled, will be listed and you would be able to drill down into the specific course to choose any lesson or SCORM

7. Mandatory/Pre-viewable Items

- You can make any test and lesson mandatory to complete, from the properties tab
- Some or all lessons and tests can be made pre-viewable

8. Ownership

- Same as managing ownership of tests (*read on previous page*)

9. Authorization

Site level: course is preview-able which means anyone who is a valid user can launch this course, anytime, any number of times without tracking.

Private: course can be scheduled only in the selected authorized groups. Click Add and add desired groups as authorized group. You would only see those groups where you have admin or instructor role. Private Course can also be made pre-viewable (without tracking) by selecting preview option.

10. Publish

- Click publish button to publish the course

VII. Creating Course Session

1. Start

- Click on calendar icon .
- Select a group, you will see a list of all groups (for site level course) or authorized groups for the course (for private course)
- Select start/end date of the session
- Optionally select Enroll option
- Click Save

2. Adding Learners

- You can view all course sessions from Course->Course Sessions list
- Open the course session details of any specific session and click on Members tab
- You will see the list of existing members for selected role (learner/instructor).
- Click on Add Members
- You have 3 options there, first option allows selecting any user from the group members list
- Second option allows you to enter usernames
- Third option allows you to enter email ids, if no user is found with that email, a new user account will be created with username same as email

Emails to learners

- You can choose to send email notifications to learners while adding them, or you can resend emails selectively from the course session's members listing.

VIII. Course Session Settings

- Open the course session details and click on Edit
- You can also specify max subscription days, to auto assign end date of learner in a course session
- You can click on settings and enable or disable additional features

IX. Tracking Progress

- Learner's listing shows brief status information and completion status, icon indicates completion
- You can click on name to open learner's transcript page, which shows complete status for each item in course
- Instructor or admin can allow more attempts for any test (where their allowed limit is reached) or lesson (where allowed time limit is reached) to learner from the transcript page
- Learner's end date in a course session can also be changed from the transcript page.

X. Administration

1. **Creating Users**
   - Go to Users->Upload Users.
   - Enter comma separate values into the text field.
   - Select send welcome email and password options
   - Optionally add user to one or more groups right away
2. **Create users from emails and add to group**
   - Open group details and go to Members tab
   - Click on Add Members button
   - Click on Enter Emails – enter comma-separated emails.
3. **Enabling Self Signup**
   - Open Site Admin->Site Details->Security tab
   - Check the checkboxes "Enable Self Signup", and Captcha (optional)
   - Save
4. **Reset Password**
   - Open Users -> View Users
   - Select one or more users, and click 'Choose an Action' - Send Password Reset Email
5. **Add one user to multiple groups**
   - Open Users -> View Users
   - Search for the user, and click on Edit
   - Open Group Memberships tab
   - Click on Add User to Groups
   - Select the groups from the displayed list, and select role this user will have in each group
   - Click Subscribe
6. **Add multiple users to a group**
   - Open group details and go to Members tab
   - Click on Add Members button
   - List of all site users will be shown, just search / select the users
   - Click on Add new members as button and select the role users will have in the group.
7. **Add to a group using usernames**
   - Open group details and go to Members tab
   - Click on Add Members button
   - Click on – Enter Usernames
   - Enter comma separated username, role on each line and click Submit

9. **Proxy Login**
   - Click on Users->Proxy Login
   - Enter your username/other user's username
   - Enter your password and Click on Sign in

10. **Deactivate user**
    - Open Users -> View Users
    - Search for the user and select the user
    - Click 'Choose an Action' - Deactivate option.
11. **Reactivate user**
    - Open Users -> View Users
    - Check Inactive Users checkbox
    - Search for the user and select the user
    - Click Activate button

XI. Customization

Custom Homepage

- Click Site Admin-> customize link and follow the wizard until you reach the Create Customized Homepage option, click it.
- Go to Site Admin->CMS and edit index page
- Publish the content from CMS list page

Header/Footer

- Open the Site Admin->Placements list
- Edit the content in Header / Footer (web *developer skills are needed*)
- Publish the changes

Custom Placements

- Open the Site Admin->Placements list
- Edit the content in any placement such as About Us, Sign in Panel, Signup panel and Homepage panel and publish

Email Settings / Templates

- Open Site Admin->Email Settings
- Set the Admin email id, and display name settings for all outbound emails from your microsite
- Enable or disable specific emails from each
- Override the specific email template (full body) by clicking on the icon (*webdev skills are needed)*
- To revert an overridden template, click the icon
- To change common header/footer for all email templates Go to Site Admin->Placements and edit Email Header / Email Footer placement (*web developer skills are needed)*

Email Monitoring

- Open the Reports-> System->Email Notifications list to view list of all emails generated by the system in your site
- Click on to view the email content

Certificates

- Go to Site Admin->CMS and click on new certificate template
- Enter the custom template code (check examples in knowledgebase on support.edubrite.com)

Online Payment Integration

- To enable online payment integration, go to the Site Admin->Site Details->Features tab
- Enable Commerce features and Save
- Go to the Site Admin->Site Details->Payment Integration Details tab, and enable specific payment gateways (e.g. PayPal, Authorize.net, Merchant Warrior etc.). Enter payment provider specific details.

XII. Reports

Learning Reports

- Go to Reports -> Learning
- Access Learners Report, filter report for a course/course session/user or using other filtering options available.
- Access Program Members Reports
- Scorm attempts and activity reports are also available.

Assessment

- Go to Reports -> Assessment
- Test Scores /Test Attempts reports
- Filter the list of scores by using any available options

Summary and System Reports

- Go to Reports -> Summary -> Enrollments – Group/course or program enrollment reports can be accessed.
- System Reports includes Usages report, Payment transactions, Coupon codes and Email notifications
- User Session report provides all sessions details and browser wise statistics.