

# OnPoint Course Manager:

## Section 1

## Introduction



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## 1.0 Course Manager Introduction

OnPoint's Course Manager is the primary application used by content developers, course coordinators, instructional designers, systems administrators and Subject Matter Experts who need to create, update and manage content for their user community. Course Manager is a web-based application and most of its basic and extended functionality is generally accessible via an Internet web browser on a PC, Macintosh or Unix workstation. OnPoint recommends a broadband-connected workstation to execute most Course Manager program features. Using Course Manager, content creators and administrators can gather, import, organize, and deliver their online content as well as manage and track the user and learner communities that access their assembled content.

### 1.0.1 Overview: Intended Audience

The Course Manager application was written for a non-technical audience and was designed to be intuitive to understand and use. Once the system is up and running, the average content creator and administrative user can learn the basics of creating, managing and delivering content in just a few hours, and they can be fully productive with all the features and functions of Course Manager within a few days. In addition to this Help Guide, OnPoint provides online help files accessible within Course Manager as well as a detailed online e-learning course that can be used to learn about specific functions or common procedures.

## 1.1 Course Manager Main Menu & Interface

Upon successful login, the opening screen is the Course Manager Main Menu. The data displayed on this first screen is customized to each administrative user who accesses the Course Manager application, depending on their assigned "level of access."

The Course Manager Main Menu is comprised of several informational displays and provides a point and click interface to access any of Course Manager's many features and functions. As shown below, the Main Menu consists of four function classes including;

- A. A dropdown menu system
- B. A dashboard display with summary and licensing information
- C. Administrative links including Clear Filters, Refresh, Active Sessions, Memory Cache, Versions, and Status
- D. Commonly used icons and application links Home, Help and Logout

### 1.1.0 Main Menu & Interface: Dropdown Menu System

The majority of all features and functions in Course Manager are accessible using the dropdown menu system found across the top of each screen in Course Manager. This menu system is comprised of dynamic/DHTML code that, when clicked on, opens to reveal additional submenu choices. Submenu choices are available under each of the eight top-level menu options including Users & Groups, Content, Assessments, Skills, M-Learning (if activated), Events, Email Manager and Administration.

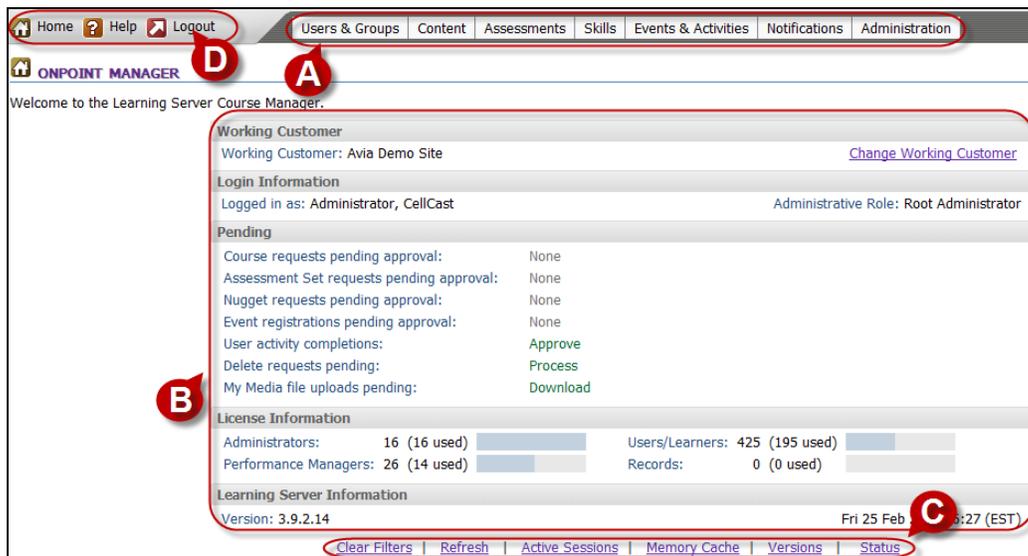


Figure 1-1-Course Manager: Overview



**Note:** The drop-down choices displayed to content authors and administrative users vary based on their unique login credentials and their assigned system permissions. Site Administrators have full access to all Course Manager features and program functions and, therefore, are presented with the full array of D-HTML menu choices.



**Note:** Customers who have purchased extensive system customization may see different menu choices and captions as specified by their unique system requirements. Captions and menu choices may be reordered or localized in another language as needed.

### 1.1.1 Main Menu: Course Manager Dashboard Display

The dashboard appears on the Main Menu page only and helps to summarize pending tasks to be performed by an Administrator. The Dashboard is divided into four sections: Login Information, Pending Tasks, License Information and Learning Server Information.

- **Login Information** - Displays your Login Name and assigned Administrative Role.
- **Pending Tasks** - Shows pending assigned tasks (indicated in bold) that need to be addressed. These pending tasks include approval and denial functions that permit/deny users access to new courses, assessment sets/tests, training events, activities and My Media files uploaded by mobile users (CellCast customers only) as well as inform you of pending actions related to content including importing new assets and deleting old assets or other database records. All tasks displayed under the Pending heading can be clicked on and these links direct the administrator to the relevant screen to facilitate immediate action.
- **License Information** - A summary of your site's licensing information indicating how many administrator accounts, reporting manager/performance manager accounts, user/learner-level accounts and records-level accounts you have purchased and used to date (the latter number is present in parentheses).
- **Learning Server Information** - Provides system-level details about your Training Server's system name or IP address as well as shows the current system time clock.

### 1.1.2 Main Menu: Administrative Links

These administrative links give administrators additional information about the system state.

- **Clear Filters.** Clicking this link will clear all search filters in Course Manager.
- **Refresh.** Clicking this link refreshes the Home page.
- **Active Sessions.** Clicking this link shows Administrators how many people are logged in to each system application. Administrators can drill down to see the specific users who are in the session and can remove them from their current session by clicking the clear link.
- **Memory Cache.** Clicking this link allows the Administrator to clear the cache for any/all of the applications
- **Versions.** Clicking this link shows the version number for each application.
- **Status.** Clicking this link shows the status of all applications that make up the OPLS.

### 1.1.3 Main Menu: Application Icons & Links

These high-level application icons and links help move Administrators around in Course Manager and provide access to online help files when needed. The two most commonly used functions direct an Administrator from any Course Manager screen back to the Home Page/main menu and the Logout function facilitates a graceful exit from the system instead of just closing your web browser.

The online Help files are prepared and maintained by OnPoint's Support Team and updated regularly to provide detailed support for using all common Course Manager features and functions. These online Help files are a subset of the full Course Manager documentation you're reading now but also include hypertext links that make it easier to navigate and use while seeking answers to questions authors and administrators face.

## 1.2 Administrative Levels & Security Roles

OnPoint's Course Manager application is a shared web application that provides system access to several different types of administrative users and managers. To facilitate group activities and impose organizational controls, there are several different types of administrative accounts that can be defined and established for different classes of managers, content authors and systems personnel who may be involved in the normal operation and management of your online training platform.

Course Manager is generally accessible by two different classes of users: administrator accounts or reporting manager accounts. Both represent/use different licensing scenarios and have different access rights.

### 1.2.0 Administrative Levels: Administrator Accounts

Administrator accounts have more program functionality available to them; Administrators typically provide broader support for your system's user community and possess higher levels of access and control over content and information presented to those users. As shown in the table below, Administrative Accounts have the following levels and security roles assignable/available.

#### 1.2.1 Administrator Levels: Administrative Roles

The assigned level of the Manager:

- A. **Root Administrator** (Level 6) – Top-level security with access to all system features including viewing, updating and creating customer slices on dedicated servers and other license-specific tasks.
- B. **Site Administrator** (Level 5) – Top-level access with all rights to system functions for any assigned customer slice. Site administrators can create, edit and update all information for their slice only.
- C. **Content Administrator** (Level 4) – Access to most system functions for an assigned customer slice except system-level configuration menus and utilities and deletions tasks.
- D. **Course Coordinator** (Level 3) – Ability to design and edit content for an assigned customer slice, but no deletion rights.
- E. **Event Manager** (Level 3) – Ability to schedule and edit event calendars for an assigned customer slice.



**Note:** Administrators can create new administrator accounts provided sufficient licensed seats are available. Created accounts must be one level down from their own assigned level. For instance, Level 4 administrators can create Level 3 or lower administrative accounts but not other Level 4 accounts.

### 1.2.2 Administrative Levels: Reporting Manager Accounts

Reporting Manager accounts have access to limited program functionality via Course Manager (and Performance Manager if installed) but the access is ideal for business managers, department managers and supervisors, and even affiliated third parties (customers, partners) who need access to your system to run reports and analyze training activities for their own employees. Reporting Manager accounts can be setup to filter out any and all information not specific to a select group of users and restrict access to every system function (e.g., adding users, changing content, updating tests) that doesn't relate to tracking the progress of a set of users. As shown in the table below, Reporting Manager Accounts have the following levels and security roles assignable/available.

### 1.2.3 Administrative Levels: Administrative Roles

The assigned level of the Reporting Manager:

1. **Reporting Manager** (Level 2) – Provides access to Course Manager but restricts access to system functions that deal only with users assigned to a defined OnPoint Group and provides access to all standard Course Manager reports but filtered only for their assigned Group.



**Note:** Administrators can create new Reporting Manager accounts provided there are sufficient Report Manager licensed seats available.

## 1.3 Course Manager – Logging In

Once your hosted site or application instance has been properly installed and configured (see OnPoint's Installation Guide for more information on enterprise installations), you can access your Course Manager application using your web browser by pointing to the appropriate or assigned Uniform Resource Locator (URL) as supplied by OnPoint's Support Team or your own systems administrator.

### 1.3.1 Logging In: Instructions

1. Simply type the name of the Course Manager URL into your web browser's "Address" entry box and hit the Enter key. (e.g. <http://63.34.130.12/opcm>).
2. Successfully accessing the Course Manager login functionality displays the Course Manager Login Screen.



**Note:** Your login page will either appear in the standard set-up or it may be customized to meet the branding requirements for your organization with updated site captions and logos.



**Note:** In OnPoint portal environments, administrators needing access to Course Manager generally accomplish this via the Manager Application Selection Tile.

3. To login, simply enter your login credentials (consisting of a unique login name and password) as supplied by your Site Administrator or OnPoint's Support Team and hit the  button. Click the **Clear** link to clear any entries and start again. Click the **Password Hint** link to receive an email with your supplied password hint if you have forgotten your password.



**Note:** Your login credentials for Course Manager can also be used as your login credentials to access content via OnPoint's Content Viewer application, Performance Manager and other OnPoint applications as installed/configured.

4. If you fail to be able to access Course Manager using your supplied credentials, please retry and check the spelling of your login name and password; passwords are CaSe SeNsItIvE. If you're still unable to access Course Manager, please check with your Site Administrator or contact the OnPoint Support Team.

#### 1.3.1.1 Logging In: Other Login Screen-Related Information:

Make sure you take note of a few additional utilities and functions that are found on the Course Manager Login Screen including:

- **Version Information** - Knowing the version of Course Manager you're using simplifies support tasks. Hosted customers automatically receive regularly scheduled updates so your version number may change frequently.
-  **About** – This links to a page that lists several contributing technologies and open source tools that are integrated into Course Manager as well as lists the various design and development contributors who made our application possible.
-  **Contact Us** – This link opens the default email application on your workstation so you can quickly create and send an email to OnPoint's Support Team.

## 1.4 Users & Groups

The first top level menu choice button in Course Manager's drop down menu system is Users & Groups. When clicked once, this primary level menu option opens to reveal several submenu options that provide direct access to all user- and group-related information and files stored in the shared Course Manager repository. Each related submenu option selected from the Users & Groups Menu will display a table listing of records from the OnPoint database specific to the item selected. More detailed information is available in Section 2 Users.

The Users & Groups Menu has a number of submenu selections:

Users & Groups sub menu Selections:

- **Users & Managers.** The Users & Managers selection provides a list of all licensed Users & Managers defined and managed in the shared repository. Users & Managers are listed in alphabetical order by last name, and the list includes their unique User Login, their business title or role, as well as other personal and organizational details. Specific User & Manager details are accessible and editable by clicking on the User Name link. The Manager tab is only available for site and root administrators. Others will only have access to the user's role.
- **Groups.** The Groups selection provides a list of all defined Groups in the shared repository. Groups are displayed in alphabetical order, along with a Group Description. Specific Group details are accessible by clicking on the Group Name link.
- **Job Codes.** The Job Codes selection provides a list of all defined Job Codes in the shared repository. Job Codes are displayed in alphabetical order, along with a Job Code Description. Specific Job Code details are accessible by clicking on the Job Code Name link.
- **Locations.** The Locations selection provides a tree view of all defined Locations in the shared repository. Locations are displayed in alphabetical order, in accordance with their position within the tree. Specific Location details are accessible by expanding the tree and clicking on the Location Name link desired.
- **Organization Chart.** The Organization Chart selection provides a tree view of the defined supervisory hierarchy within the organization (company). Specific User details are accessible by expanding the tree and clicking on the desired job title link.
- **Announcements.** The Announcements selection displays a list of Announcements stored in the database. Announcements are displayed in alphabetical order, and are listed by the Group with which they are associated. The table shows the Display Start Date and Time, Display End Date and Time, and the Author of the announcement.
- **Reports.** The Reports selection provides a number of preformatted Reports used by administrators to report on User/Group data.

## 1.5 My Media File Uploads

This screen allows administrators to download media files uploaded by users in order to perform and necessary file conversions. The following elements are displayed in the following table:

<i>Media File Uploads</i>	
<b>Element</b>	<b>Description</b>
<b>File:</b>	Link that displays the file name. To download the file for processing, right click the link and use the <b>Save link as...</b> functionality to save the file to your computer.
<b>Title:</b>	Displays the title of the media file entered by the user who created it.
<b>User:</b>	Displays the name of the User who created and uploaded the media file.
<b>Size:</b>	Displays the size of the file (in bytes).
<b>Uploaded:</b>	Displayed the date the file was uploaded into the OnPoint system from the user's mobile device.
<b>Action:</b>	The Remove link allows you to remove the file from the displayed list.

Once all desired files have been downloaded and/or removed from the displayed table, click the **Home** link to go back to the OnPoint Manager main screen.

### 1.5.1 My Media File Uploads: Active Sessions

The Active Session Table displays information on users who are currently in the system by application. For customers who have multiple slices and Root Administrator privileges, the table displays this information for all server slices. Click on the **number** link for any application to see details on which users are in the system, their User ID, system role and how long they have been in the system.