# Pegasus ™
Powered by Onsite

# LMS Configuration Procedure
# for Client Administrators

# Contents

## PURPOSE

The purpose of this document is to outline the LMS configuration process, to ensure a consistent approach and reduce setup errors.

## PROCESS FLOW AND RESPONSIBILITY

The following process flow outlines the high-level steps required to configure a training course in the LMS and indicates where the step is undertaken and whom responsibility it is to perform that step.

| Process Step | What Module | Whom |
|---|---|---|
| 1. Create Course & Configure | LMS | Yancoal |
| 2. Send an email to Pegasus with course and competency details | Email | Yancoal |
| 3. Configure Middleware | Training Middleware | Pegasus |
| 4. Create Course Events | LMS | Yancoal |
| 5. Schedule attendees | Client Portal for Employees<br>Contractor Portal for Contractors | Yancoal<br>Contractors |
| 6. Pass out attendees | LMS | Yancoal |

## TYPES OF COURSES

- Classroom course
- Online course

## LMS TEMPLATE SIZES

**Certificate Background**

Upload your own custom certificate background. The image file (PNG, JPG) must be exactly 1000 pixels wide by 1400 pixels high.

**Thumbnail Image**

Recommended format:
480px X 480px jpeg

Select Image

# Pegasus
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## Header Image

Recommended format:
1600px X 480px jpeg

4

Select Image

### Logo

Recommended format:
No greater than 500px wide x 250px high
and 100kb
PNG with transparent background

## LMS SCORM SETTINGS TO MARK A COURSE AS COMPLETE
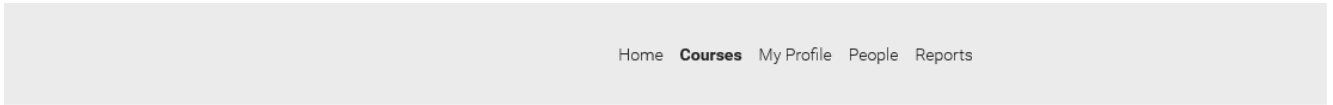
The below options are used to record a result.

- success = passed -> passed
- success = unknown and completion = complete -> passed
- completion = unknown and success = unknown -> yet to start
- completion = complete and success = failed -> failed
- All else -> in progress

## DIFFERENCE BETWEEN EACH ROLE AND THE PERMISSIONS FOR EACH ROLE

| | |
|---|---|
| Learner | - Can view and complete their own booked courses. To do this, they need to select 'My Profile'.<br>- Can view their own certificates from all the enterprises. Access this via the 'My Profile' tab.<br>- Can view 'My Calendar', if they have a booked classroom event.<br>- Can change their own email and password.<br>- If they have completed an Avetmiss form, they can view the details they entered. |
| Client Administrator | **Have the same rights as an Administrator, but they are not able to:**<br>- See the 'Settings' and 'Sales' tab<br>- Remove users from group<br>- Add users to group<br>- Edit group settings<br>- Create and delete groups<br>- Remove, Deactivate or Reactivate Users<br>- Create a course<br>- Delete or archive a course<br>- Assign a user access level |
| Pegasus Administrator | **Have the same rights as an Administrator, but they are not able to:**<br>- View/Edit Enterprise Details<br>- View/Edit AVETMISS settings<br>- View/Edit Webhooks<br>- View/Edit Billing info<br>- View/Edit Settings<br>- View/Edit Roles<br>- View/Edit Enterprise Access Levels<br>- View/Edit Group Access Levels<br>- View/Edit Customisation<br>- See the 'Sales' tab<br>- Create and delete groups<br>- Edit group settings |
| Administrator | - Have full system rights |

**HOW TO CONFIGURE A CLASSROOM BOOKING IN OUR LMS**

1.  Ensure you are logged in as a Client Administrator. To know this, you will see the word, 'Administration' on the top left-hand side and the right-hand side of the Courses tab.
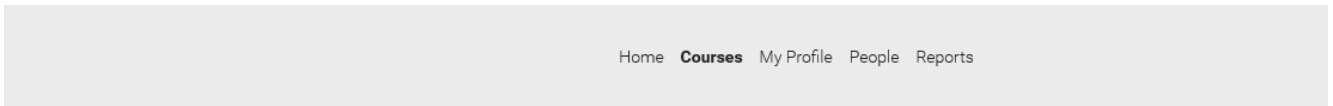


2.  Click on 'Create Course'



3.  Enter the course name, upload a thumbnail image for the course and the header for the course.



3.  Under the 'Structure', click on 'Add Section' and name this section, the name of the course e.g. Pegasus Classroom Office Induction and select 'Submit'.

4.  Click on 'Add Module' and select 'Face to Face Event.



5.  Title the event the name of the course and make sure you have in the name, 'Classroom' so we can see easily the difference between the online courses and classroom courses.

6.  Select when the event is to award the pass. Usually you wish this to be set to: *Manually set by Administrator.*
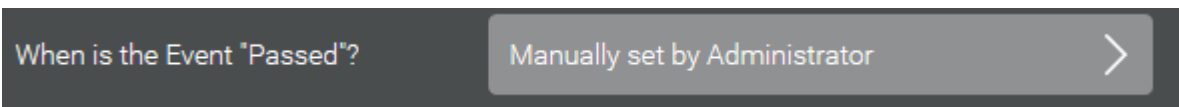


NOTE: if you select to award the pass *After the event date* is will award the competency 15 minutes **after** the course date and time has passed. Plus, all those who are in the course will receive the competency, but some people may have not shown up. For this reason, we usually set this to *Manually set by Administrator.*

7.  Select if you wish for the user (i.e. the person booked into the course) to be able to change their classroom session date. Usually this is set to 'No' but if you select 'Yes', the person booked into the classroom session can change their date if there are available alternative session dates.
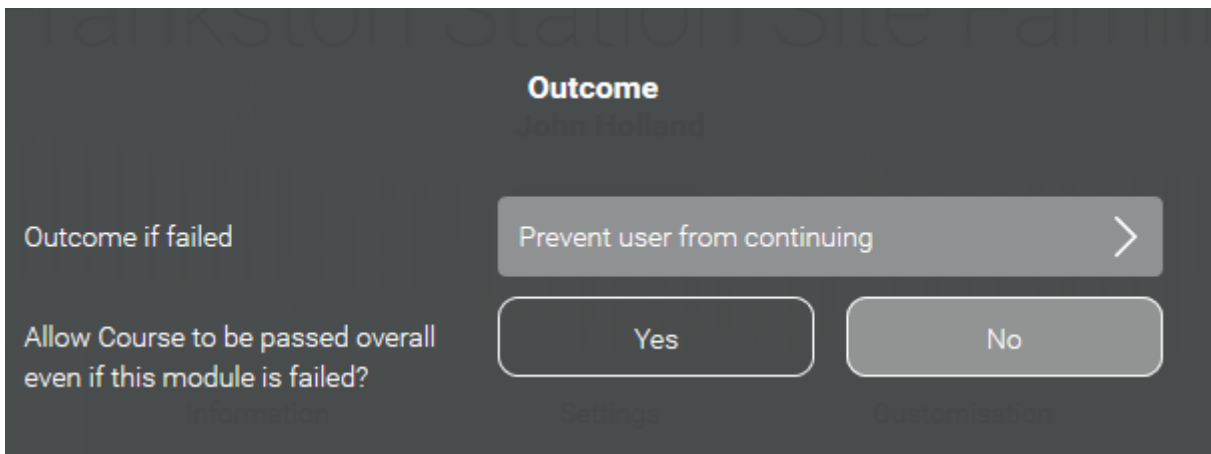


If the learner wishes to change their session date, they login and go to 'My Profile' and find the classroom course they wish to change. Once they select the classroom course, they can select 'Change session' and then click on the 'Change Session' button. Upon selecting the alternative date, they will be booked into the new date.
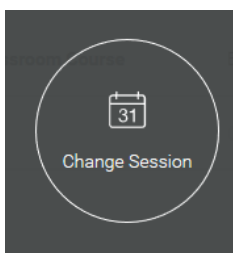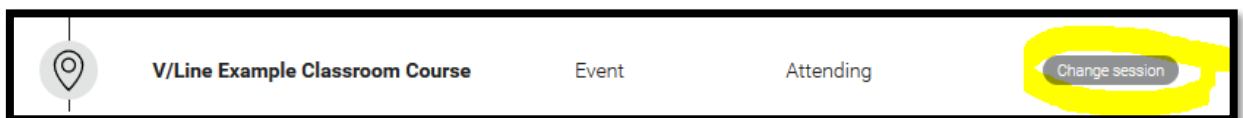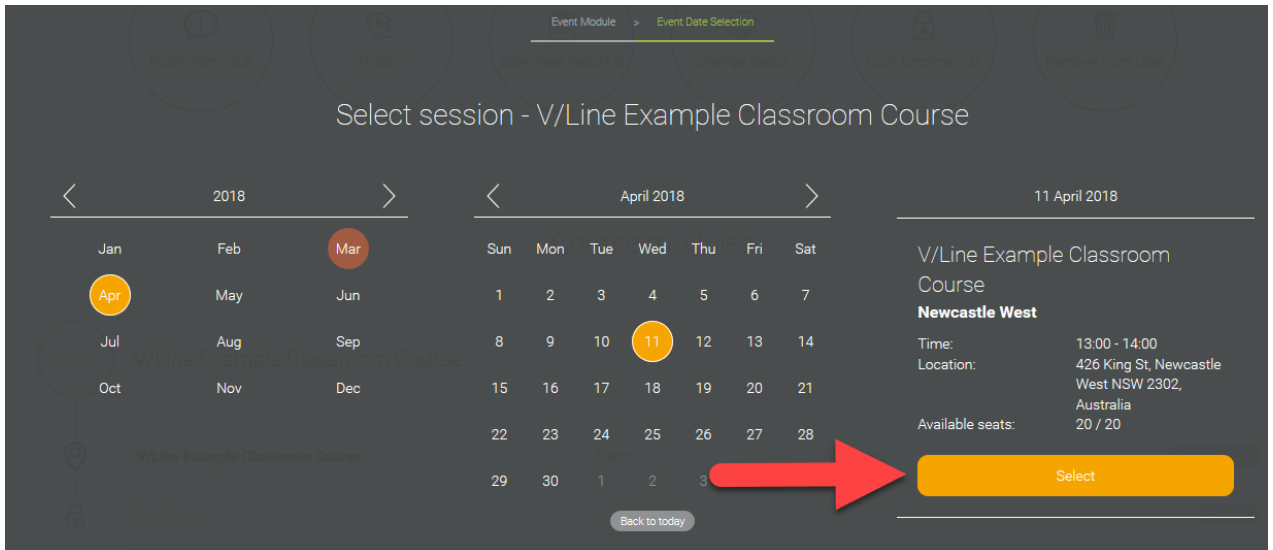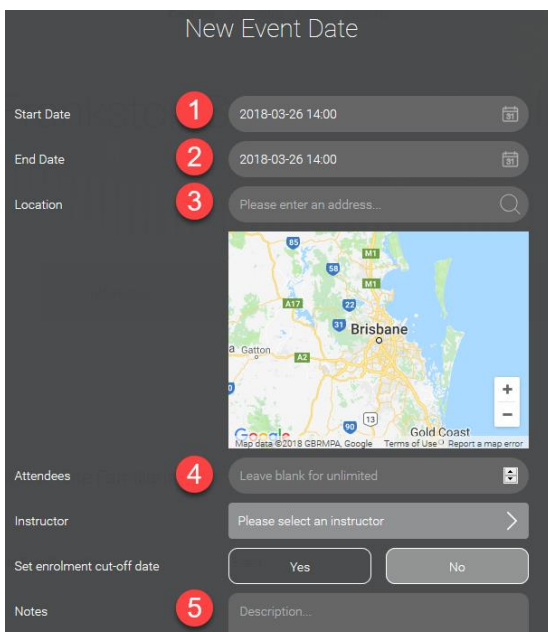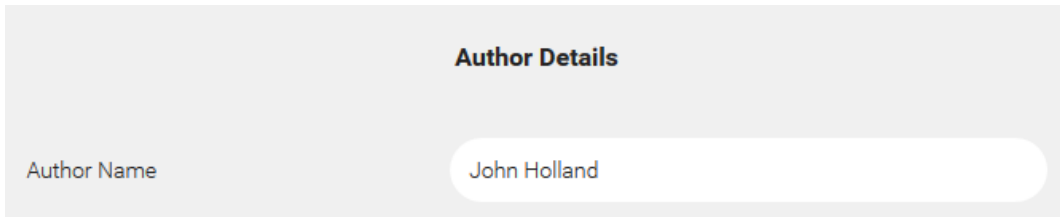
8.    Keep the outcome details as per below.



9.    Add the various dates and locations and select 'Submit'. The attendee's number is the number of seats that the classroom can permit. Usually this is around 15 to 20. The sections numbered 1 to 5 should be filled in.

10. Under the same tab, type in the 'Author Name'. This is your company name and select 'Save'.
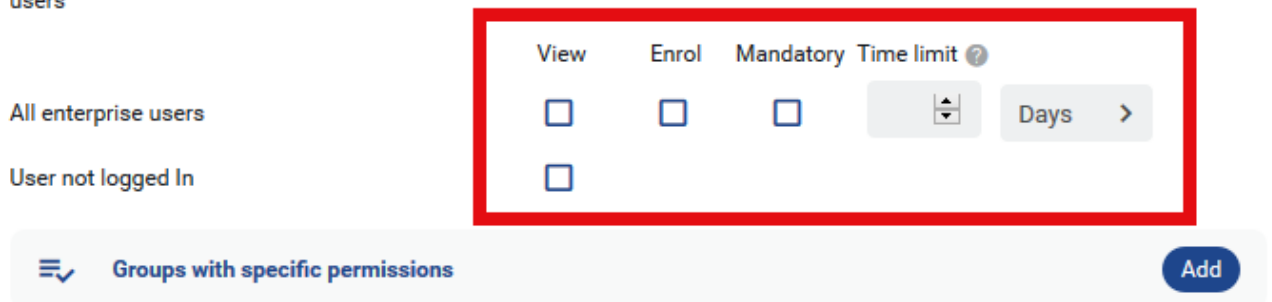
**Author Details**

| Author Name | John Holland |
|---|---|

11. Under the 'Settings' tab, **deselect** the view option for 'All enterprise users', 'User not logged in' and 'Enrol' so they are **not** ticked. It is important that you deselect these settings as our booking should only occur from the contractor or client portal, not from booking directly into the LMS otherwise if the learner does a course by booking directly into the LMS without going via the portal, the competency(ies) from the training will not be awarded back into Onsite.
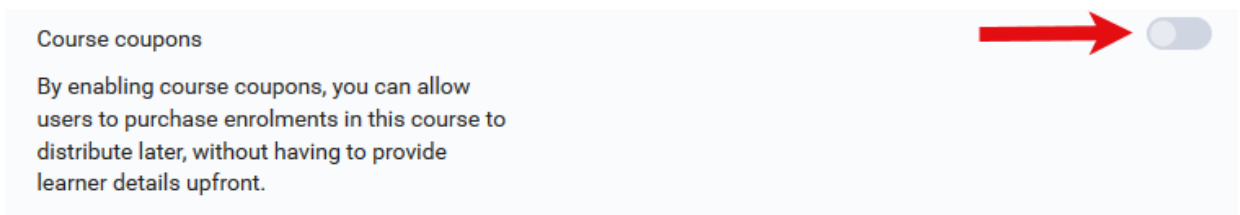
## Group access settings

Configure who can view and enrol in this course. Groups' specific permissions will override the settings for "All enterprise users"

| | View | Enrol | Mandatory | Time limit | |
|---|---|---|---|---|---|
| All enterprise users | ☐ | ☐ | ☐ | ⬍ | Days > |
| User not logged In | ☐ | | | | |

≡✓ **Groups with specific permissions**            Add

12. No need to add any Sales information as this is actioned from the Onsite end.
13. Under 'Course coupons' turn this off, so it is disabled.
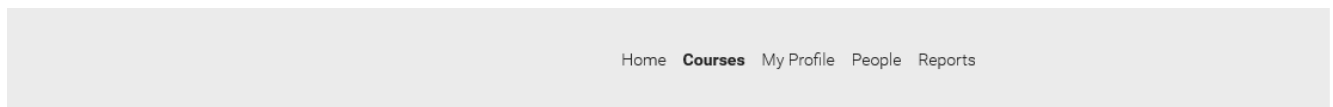
Course coupons
By enabling course coupons, you can allow users to purchase enrolments in this course to distribute later, without having to provide learner details upfront.

14. Under 'Section Access' we usually set this to 'Off' for 'Allow the user to access sections in any order' as turning this on will make the first module of each section available to the user by default.
15. Once happy with the settings, select 'Save Changes'.
16. Finally, under the 'Customisation' tab you can turn on or off certain sections. Hide the following sections: support, review, description and buy/enrol button then select 'Save Changes'.
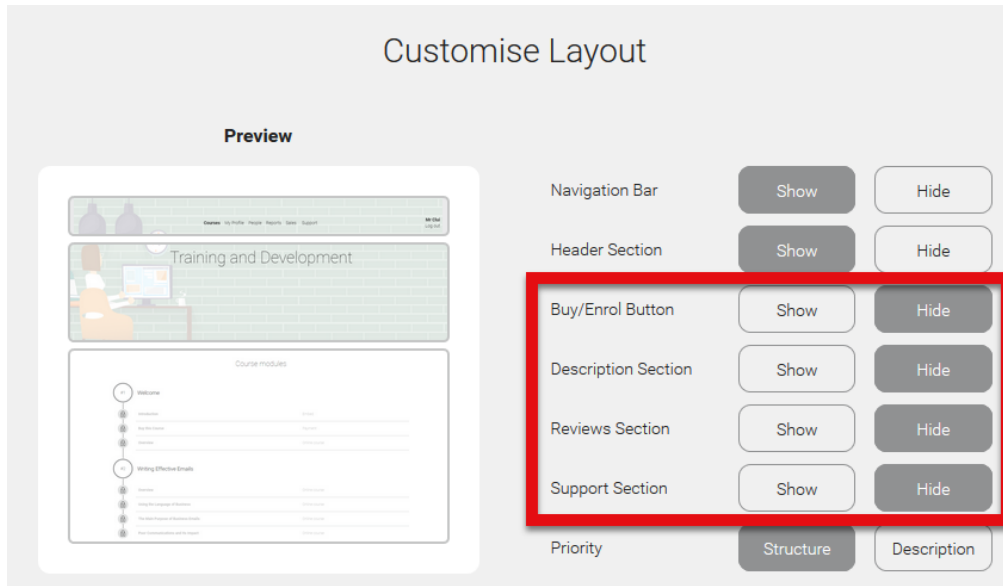
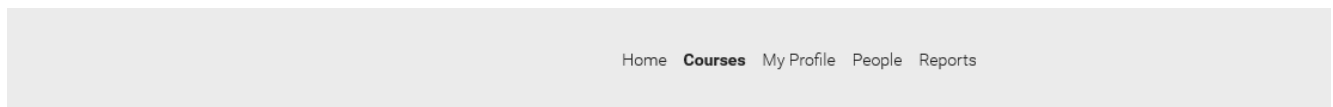## HOW TO CONFIGURE A SINGLE SCORM ONLINE COURSE IN OUR LMS

1. Ensure you are logged in as an Administrator. To know this, you will see the word, 'Administration' on the top left-hand side and the right-hand side of the Courses tab.



2. Click on 'Create Course'

3. Enter the course name, upload a thumbnail image for the course and the header for the course.

New Course

Create a course using your own content and our library of course modules.
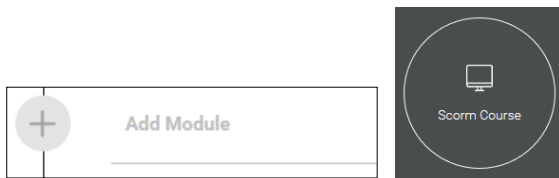
Course Name

What is this course about?

Type a few sentences to describe this course

Thumbnail image

Recommended:
480px X 480px JPEG. Under 1 MB

Header image

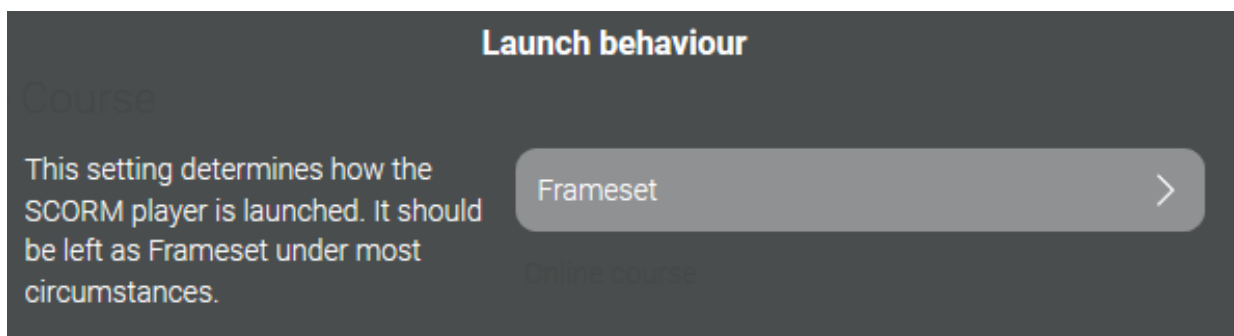Recommended:
1600px X 480px JPEG. Under 1 MB

Create course          Cancel

4. Click on 'Add Module' and select 'Scorm Course'.

Add Module

Scorm Course

NOTE: Create all modules in the first section so the learner is not awarded a pass until they have completed all sections/modules.

5. In the 'Module Title', type the name of the online course. Ensure this matches the name that you have approved for the online course.

6. Upload the Scorm Package.

7. Courses should be set to launch behaviour in 'Frameset', but you will need to test this on completion of setting up your course. If the course does not load, change this to 'New window'.

Launch behaviour

Course

This setting determines how the SCORM player is launched. It should be left as Frameset under most circumstances.

Frameset                    >

8. Ensure the 'Outcome' is set to 'Prevent the user from continuing' and the 'Allow course to be passed overall even if this module is failed?' is set to 'No' then select, 'Done'.



9. Add another module called 'Certificate' and name the 'Module Title' to 'Certificate'.
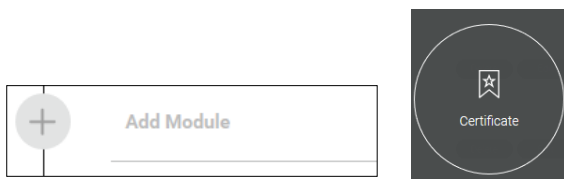


10. The 'Certificate Title' must be the **exact name of the course.**

11. Upload the certificate template and select 'Submit'. The template is included with this document.

12. Under the 'Information' tab, enter the author name. This is the company name. Save any changes.

13. Under the 'Settings' tab, **deselect** the view option for 'All enterprise users', 'User not logged in' and 'Enrol' so they are **not** ticked. It is important that you deselect these settings as our booking should only occur from the contractor or client portal, not from booking directly into the LMS otherwise the learner does a course by booking directly into the LMS without going via the portal, the competency(ies) from the training will not be awarded back into Onsite.
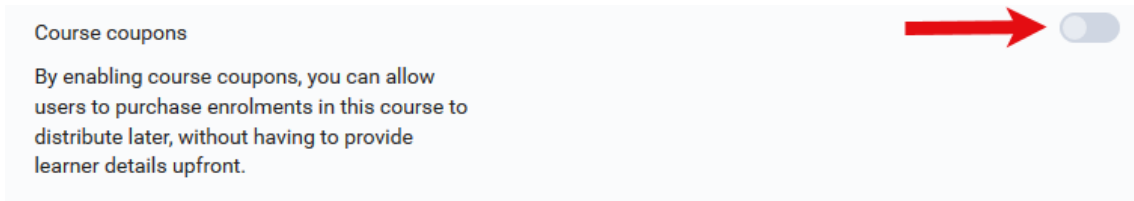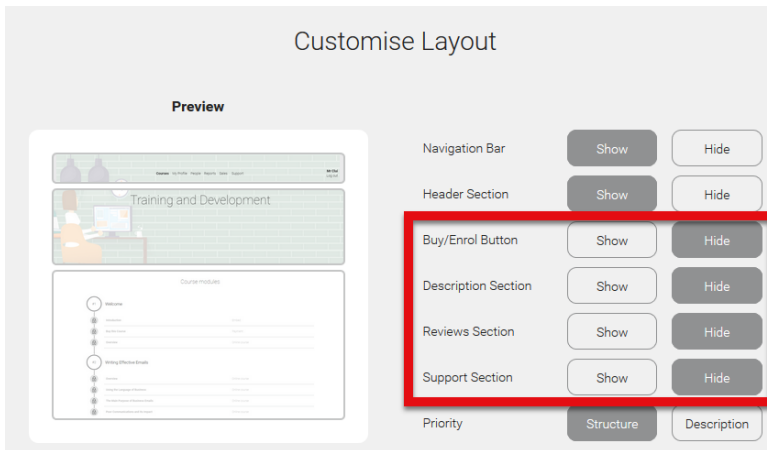


14. No need to add any Sales information as this is actioned from the Onsite end.

15. Under 'Course coupons' turn this off, so it is disabled.



16. Under 'Section Access' we usually set this to 'Off' for 'Allow the user to access sections in any order' as turning this on will make the first module of each section available to the user by default.

17. Once happy with the settings, select 'Save Changes'.

18. Finally, under the 'Customisation' tab you can turn on or off certain sections. Hide the following sections: support, review, description and buy/enrol button then select 'Save Changes'.



## HOW TO CONFIGURE A MULTI-SCORM ONLINE COURSE IN OUR LMS

The only difference from the above steps is to upload a second Scorm file but make sure you upload it in the first section so that the pass mark is not awarded on completion of the first Scorm course.
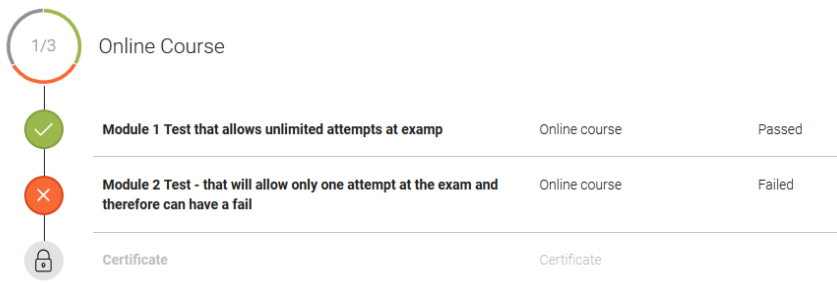


## EMAIL PEGASUS TO CONFIGURE MIDDLEWARE

To facilitate the LMS passing the competency to the Client Portal, a training middleware must be configured by Pegasus. Upon Completion of setting up a training course, the following form is to be completed: https://form.jotform.co/91387186178874 Upon submission, this form will automatically be sent to our configuration inbox to action.

## COMMUNICATION EMAILS A LEARNER RECEIVES

1.      When you are booked into your first LMS enterprise, you will receive two emails. One is an invite to the LMS informing you of your username and password and the other is an email that informs the learner of the booked in course(s) and has it will show your username again but not your password. The learner will be automatically added to that enterprise as 'Active' so there is no need for the learner to accept/activate their profile.

2.      When you are booked into your second or more LMS enterprise, the learner will only receive one email. This email is actually an accept invitation link that redirects to the course link after the learner has accepted the invite. The learner will sit as 'Invited' in that enterprise until they click on the acceptance invitation link, where they create their own password. Once they have created their password, their status will show as 'Active'.

Here is what I mean about the links for point 2:

Acceptance link: https://visy.lms.poweredbyonsite.com/acceptInvitation/779c6707-7c03-4ee9-ac53-998f50f2882f/30943

The above link redirects to this link if I have accepted the link above already: https://visy.lms.poweredbyonsite.com/courses?redirectUrl=%2FcourseDetails%2F30943

Should you book a learner into an online course, they will receive an email such as the one below. They are required to click on the 'Click here to get started' button which will take them to the appropriate client enterprise to login to either start their online course or see the details of their classroom course.
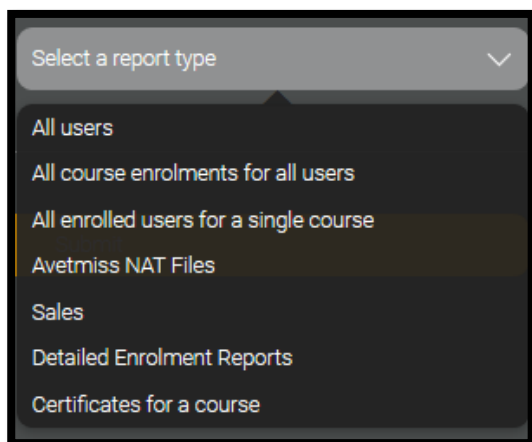
Upon logging in as a learner, click on the 'My Courses' tab, where the learner will be able to see all courses in the various status i.e. 'Yet to Start', 'In Progress', 'Passed' and 'Failed'.
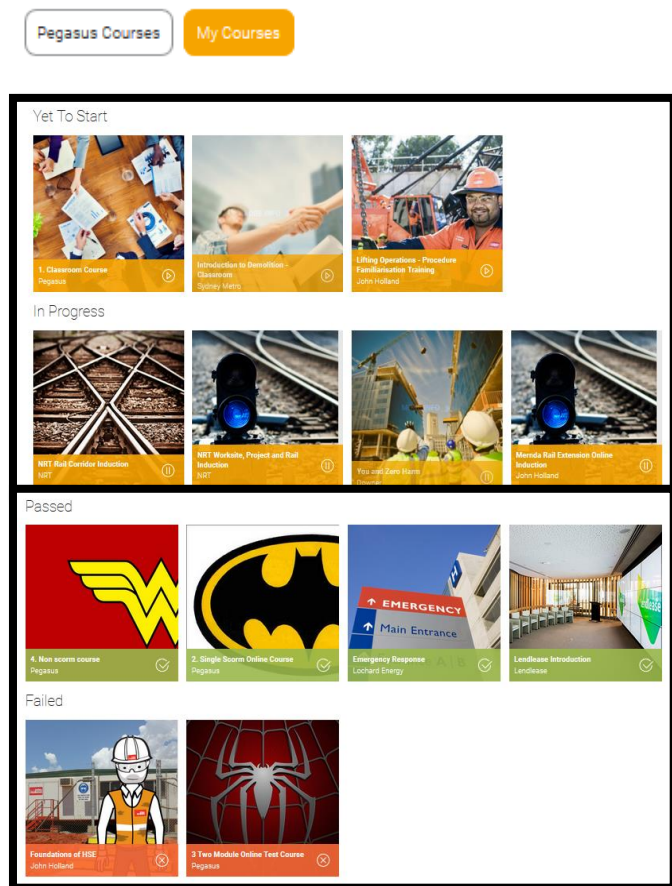


## REPORTS

There are many types of reports you can run. Here is the list of the types of reports:



Attendance Report Example:

Here is an example of a report that shows all those who are booked in to a classroom event. NOTE: For this example, I selected the 'All enrolled users for a single course' report. As I kept the date range open, I am able to see all events however should a client only wish to see one particular date, they just need to add this into the report filter.

| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | User ID | First name | Last name | Email address | Current status | Event Dates |
| 2 | 204416 | Louisa | Boulton | lboulton@pegasus.net.au | Yet To Start | Pegasus Classroom Office Induction - 17/05/2017 18:00 |
| 3 | 208609 | Brooke | Cronin | BCronin@pegasus.net.au | Yet To Start | Pegasus Classroom Office Induction - 17/05/2017 18:00 |
| 4 | 208608 | Rhiannon | Manning | ben.j.satchell+rhi@gmail.com | Yet To Start | Pegasus Classroom Office Induction - 17/05/2017 18:00 |
| 5 | 193905 | Pru | Killick | pkillick@pegasus.net.au | Yet To Start | Pegasus Classroom Office Induction - 30/05/2017 15:00 |
| 6 | 193906 | Sarah | Spurling | sspurling@pegasus.net.au | Yet To Start | Pegasus Classroom Office Induction - 30/05/2017 15:00 |

Here is the type of information that you can drag and drop to re-order the report or remove certain fields all together.
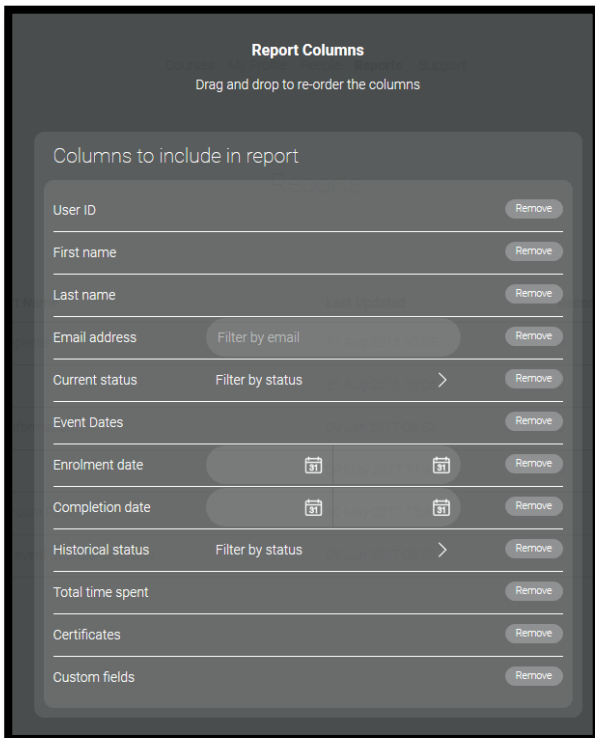


**HOW TO DOWNLOAD AN ATTENDANCE REPORT**

To do this:

    a.    Click on the classroom course you would like to download the attendance report from.



    b.    Scroll down until you see 'Who's Signed Up'.

    c.    Select the date from the 'Filter by Event' that you wish to run the attendance report from.

d. Click on the download icon that is next to the 'Filter by Event' dropdown.



e. The attendance report will then be sent to the email address of the administrator downloading it.

**PASS OUT A COURSE FOR A LEARNER (NOT A GROUP OF LEARNERS)**

There are two ways to do this.

To do this,

1. Logged in as Administrator
2. Click on 'People' tab

Home **Courses** My Profile People Reports
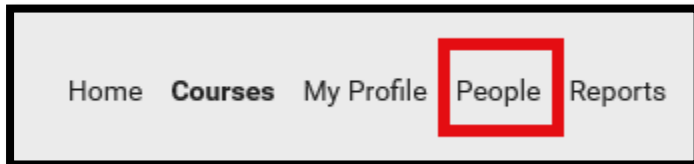
3. Search for the learner you wish to mark as passed
4. Click on their name

Search results for "spurling"
Showing 1 of 1 user Clear Search

Add user    spurling

| | NAME ▲ | ACCOUNT STATUS | LAST SEEN | DAYS ACTIVE (4 WKS) | ENTERPRISE ACCESS LEVEL | AL |
|---|---|---|---|---|---|---|
| | Sarah Spurling | Enabled | 30 Jan 2019 15:03 | 9 | Administrator | |
| | sspurling@pegasus.net.au | | | | | |

5. Click on the 'Course' tab

## Sarah Spurling
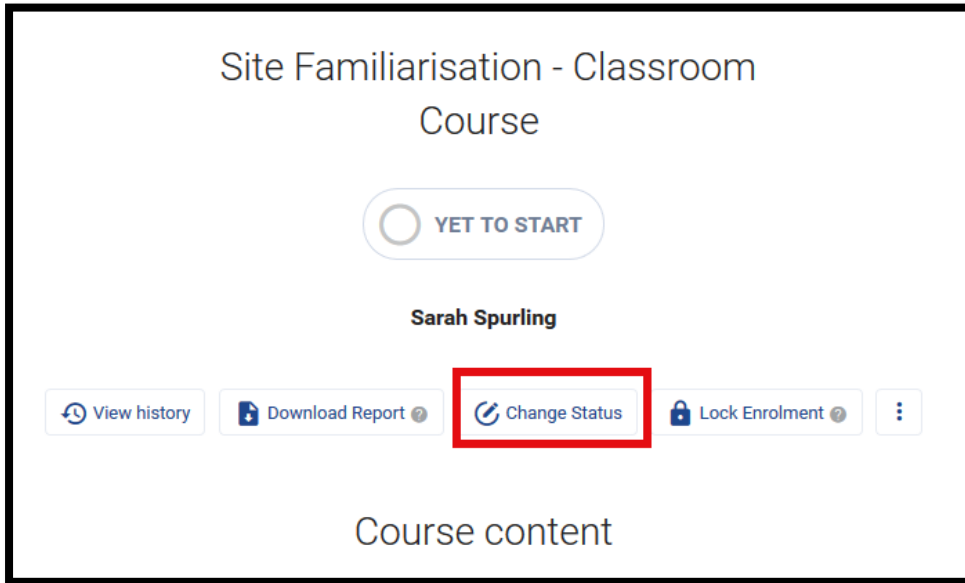Last Login 31 January 2019

PROFILE     COURSES     CERTIFICATES
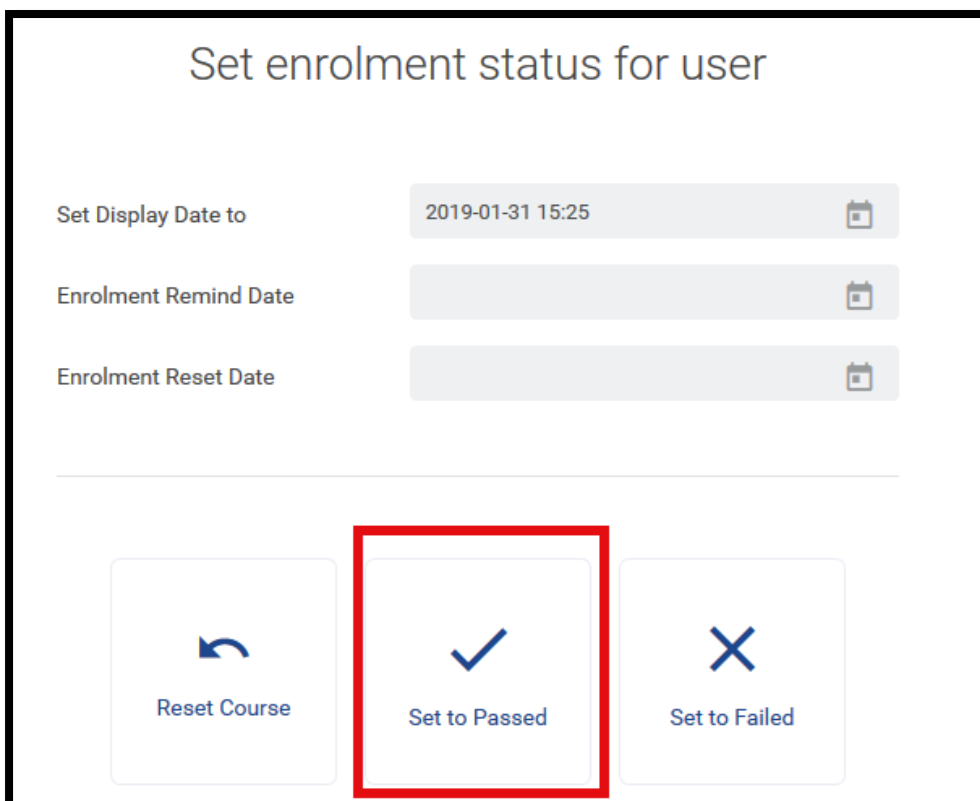
User info
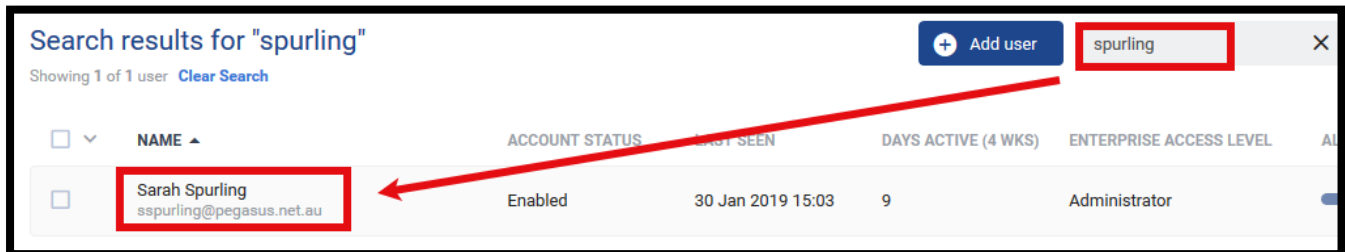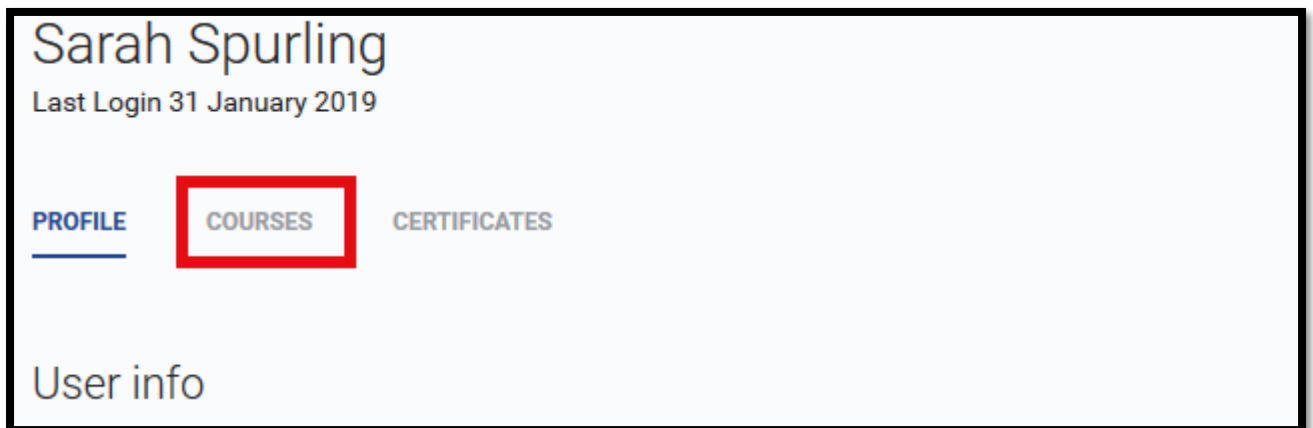
6. Search for the course you wish to mark the learner as passed and click on that course

7. Click on Change Status



8. Click on Set to Passed

9. Scroll down to the actual course and pass out **all Actions** from top to bottom by clicking on the Action button next to each module and marking them to passed. Once you have done this, the certificate is also available for the learner to view/download/save/print.
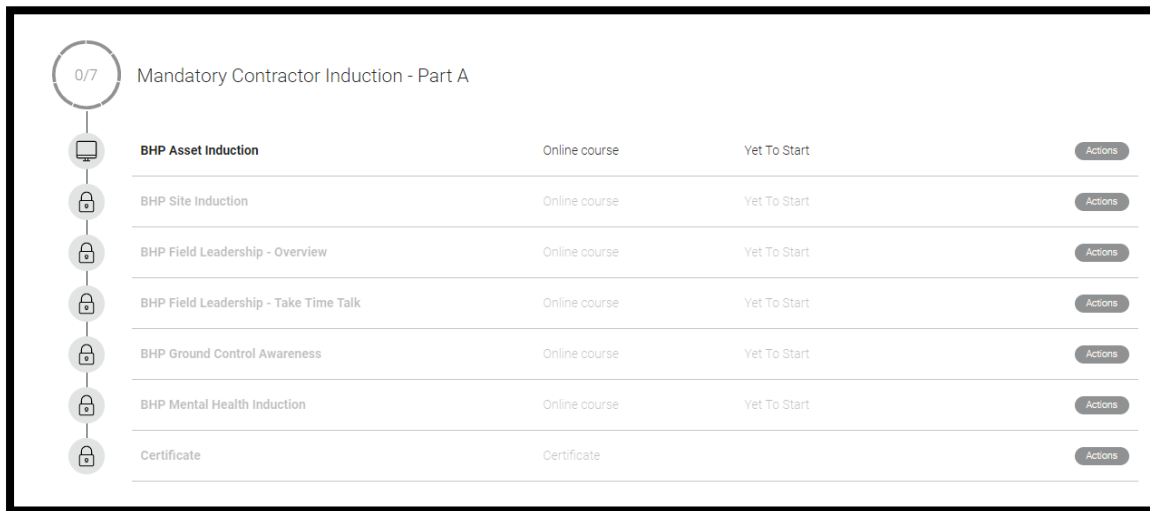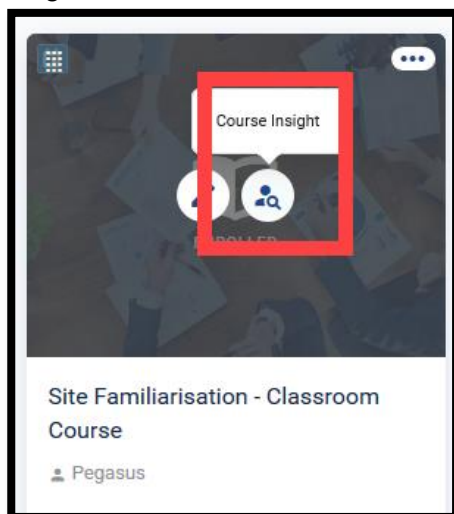


## PASS OUT A COURSE FOR A GROUP OF LEARNERS

For option this option,

1. Logged in as Administrator
2. Click on 'All Courses' tab
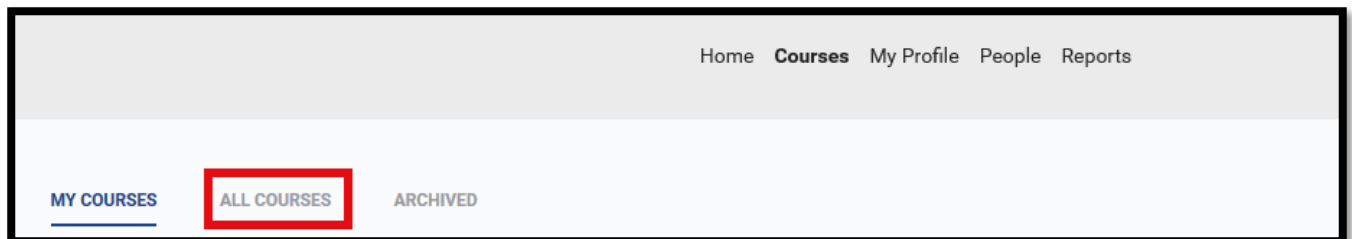


3. Go to the course that you would like to pass the group of learners in and click on 'Course Insight'.

4. Then scroll down until you see all enrolments in the course and filter the enrolments by selecting the classroom date that you wish to mark their course status.



5. Tick the box beside all the learners that you wish to mark as passed and select 'Edit event session status'.



6. Select 'Set to Pass'.

7. If anyone failed, tick the box beside their name and mark them as failed.
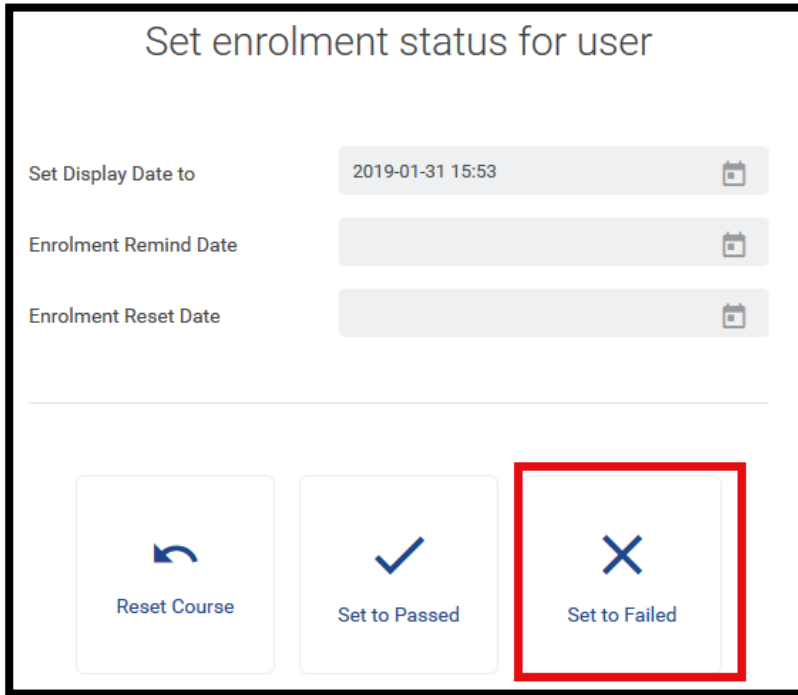
8. If someone did not attend the classroom session, **do not mark them as failed**, instead move their session to the new date. See 'How to change a learner's classroom course date' below.

## HOW TO CHANGE A LEARNER'S CLASSROOM COURSE DATE

There are a few ways to change a learner's course date however the quickest method is listed below.

1. Go to the course that you would like to remove the learner from and click on 'Course Insight'. See image below.
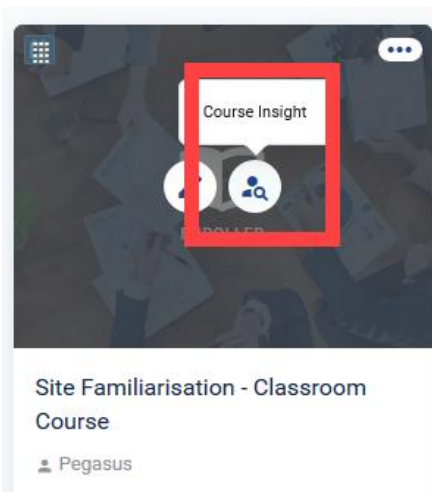
2. Then scroll down until you see all enrolments in the course and search for the learner you wish to change. Once you find that learner, click on the three dots to the right of their name and select 'View event details'.

**Search results for "sarah"**

Showing 4 of 4 enrolments **Clear Search**

Filter by Event

| NAME | ACCOUNT STATUS ▲ | LAST LOGIN | COURSE STATUS |
|------|------------------|------------|---------------|
| Sarah Spurling<br>QA-1015180 | Enabled | 02 Mar 2018 15:13 | ○ YET TO START |

- 🕐 Enrolment History
- 📄 Download Report
- 👤 View user profile
- 📅 View event details
- ✉ Notify Admins
- ✎ Set enrolment status
- 🔒 Lock enrolment
- 🗑 Remove from user

3.   Select 'Change Session'.

## Site Familiarisation - Classroom induction

This is an example of a Classroom training booking.

| | |
|--|--|
| Start Time | 18 Jun 2018 10:00 AM |
| End Time | 18 Jun 2018 12:00 PM |
| Location | 426 King St, Newcastle West NSW 2302,<br>Australia, Newcastle West |



| | |
|--|--|
| Notes | Please bring your drivers licence |

| Add to calendar | Change Session | Set Status |
|-----------------|----------------|------------|

4. Select the new session date and then click on 'Done'.

## Select session - Site Familiarisation - Classroom induction

| | 2018 | |
|---|---|---|
| Jan | Feb | Mar |
| Apr | May | Jun |
| Jul | Aug | Sep |
| Oct | **Nov** | **Dec** |

### December 2018

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|---|---|---|---|---|---|---|
| 25 | 26 | 27 | 28 | 29 | 30 | 1 |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 9 | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | **18** | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 | 29 |
| 30 | 31 | 1 | 2 | 3 | 4 | 5 |

Back to today

### 18 December 2018

**Site Familiarisation - Classroom induction**
**Newcastle West**

| | |
|---|---|
| Time: | 14:00 - 15:00 |
| Location: | 426 King St, Newcastle West NSW 2302, Australia |
| Available seats: | 50 / 50 |

Select

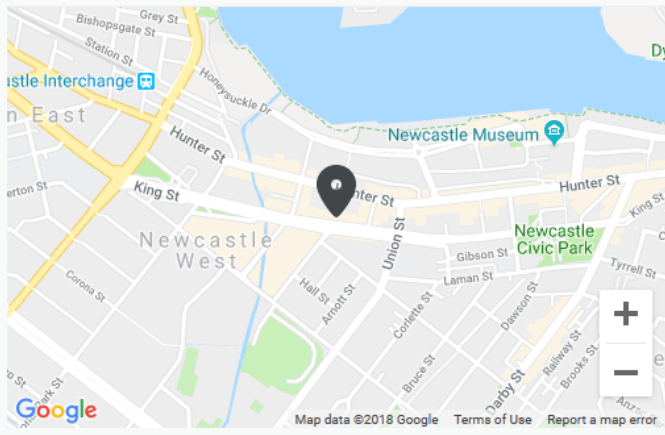## Site Familiarisation - Classroom induction

This is an example of a Classroom training booking.

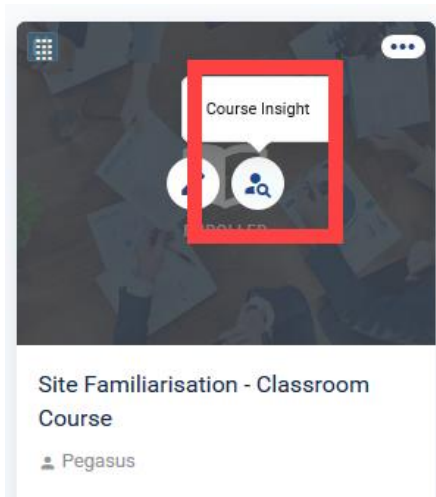| Start Time | 18 Dec 2018 02:00 PM |
|---|---|
| End Time | 18 Dec 2018 03:00 PM |
| Location | 426 King St, Newcastle West NSW 2302, Australia, Newcastle West |



Add to calendar    Change Session    Set Status

Done

## HOW TO REMOVE A LEARNER FROM A CLASSROOM COURSE

There are a few ways to remove a learner from a course however the quickest method is listed below.

**NOTE: ONLY EVER REMOVE A LEARNER FROM A COURSE IF THEY SHOULD NEVER HAVE BEEN BOOKED INTO THE COURSE AT ALL.** IF THEY ARE JUST IN THE INCORRECT SESSION DATE, CHANGE THEIR SESSION DATE AS EXPLAINED ABOVE.

1. Go to the course that you would like to remove the learner from and click on 'Course Insight'. See image below.



2. Then scroll down until you see all enrolments in the course and search for the learner you wish to remove from the course. Once you find that learner, click on the three dots to the right of their name and select 'Remove from user'.

## HOW TO LOCK AND UNLOCK A COURSE

If you have assigned a course to a learner and you do not wish for them to do the course until a certain date and/or time, you can lock the course so that the learner is not able to start it until you have unlocked it.

To do this:

1.    Go to the course.
2.    Scroll down to the section that shows 'Who's Signed Up'
3.    Click on the person's name.
4.    Click the ellipsis (three dots next to their name) and select 'Lock enrolment'.



To unlock the learner, do the same as above but this time, select unlock.

When the learner logs in to view their courses, it will have a little red lock on the course to symbolise that the course is locked. When they click on the course, they will also see a lock on the online course and no launch button, until it is unlocked by the administrator.

## HOW TO CHANGE A LEARNER'S NAME IN THE LMS

If a learner has had a name change or the administrator who booked the learner into the course(s) spelt their name incorrectly, you can change this if you have administrator rights only.

1.    To do this, find the person under the 'People' tab and select the appropriate person from the list.
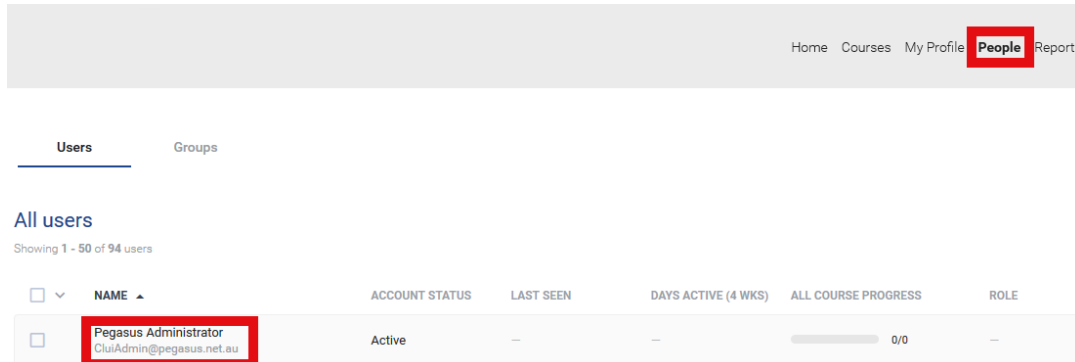


2.    Then select 'Edit name' under the learner's profile and correct the name accordingly.
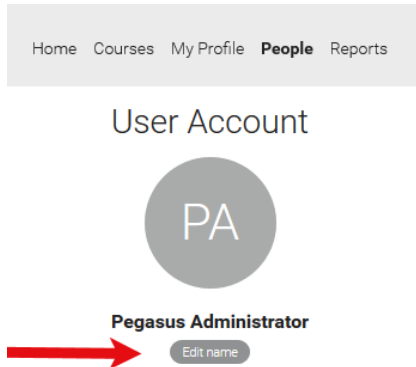


NOTE: Learners are not able to change their own name. Once you have actioned this, all the learner's certificates will update with the new spelling of their name.