

# LMS Configuration Procedure for Client Administrators

Version 5



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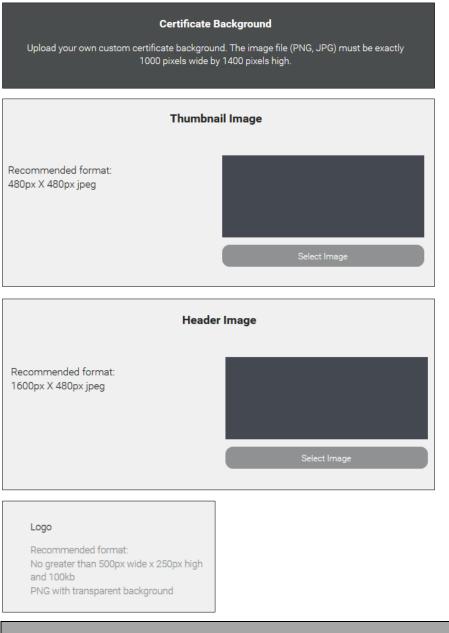
# **PURPOSE**

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

#### **TYPES OF COURSES**

- Classroom course
- Online course

#### **LMS TEMPLATE SIZES**



# Favicon icon size

Must be **16x16 pixels** or **32x32 pixels**, using either 8-bit or 24-bit colours. The format of the image must be one of PNG or GIF.



#### 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

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

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



# HOW TO CONFIGURE A CLASSROOM BOOKING IN OUR LMS

1. Ensure you are logged into the LMS as an Administrator. To know this, you will need to go to the 'My Profile' tab. Next to 'Learning space access level' you will see your access type, which should be 'Client Administrator'.

User info	
Username	
Email	
Password	******
Member since	-
Learning space access level	Client Administrator 🧪
Primary manager	-
Secondary manager	_

- 2. Click on the 'Courses' tab.
- 3. Click on 'All Courses' and click 'Create course'.

	Home Courses My Profile People Reports			
MY COURSES ALL COURSES ARCHIVED	[	+ Create course	Q	

4. Enter the course name, change the course category using the drop-down box to 'Classroom'. Upload a thumbnail image and the header image for the course.

New c	x
Create a course using your own conte	ent and our library of course modules.
Course Name	Course category Select course category
Type a few sentences to describe this course	
Thumbnail image Max file size: 1MB Max image size: 570px X 440px Accepted file types: jpg.png.gif	Header image Max file size: 1MB Max image size: 600px X 480px Accepted file types: .jpg .png .gif
	Create course Cancel



5. Under the 'Course Content' tab, click on 'Add Section' and name this section, the name of the course e.g. Pegasus Classroom Office Induction and select 'Submit'.

COURSE CONTENT INFORMATION	SETTINGS CUSTOMISATION		View Course Page	💂 Course Insight	Copy Course
+ Add Section	]	Let's start by adding a section below!			

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

COURSE CONTENT	NFORMATION SETTI	NGS CUSTOMISATION		View Course Page	ዲ Course Insight	Copy Cou
#1 Exam	nple Course					
+ Add M	lodule					
	Add n	nodule				
Corm course @	Form	File	Document viewer @			
Path selection @	Approval @	Assessment @	Certificate @			
<b>P</b> Face to face event	Webinar	F Action @	Web object @			
Video @	User AVETMISS data	Course AVETMISS data	<b>Q</b> uiz			

- 7. Add the name of the course to the 'Event title' section.
- 8. Add a brief outline of the course in the 'Event Description' section if desired this is not mandatory.
- 9. Select when the event is to award the pass. Usually you would set to 'Manually set by Administrator'. NOTE: if you select to award the pass 'After the event date' the system will only award the competency the day after the course date has passed. It does **not** award the competency after the time of the course has passed on the day of the course. Also, all those who are in the course will receive the competency, however, some learners may have not shown up and therefore should not be passed. For this reason, we recommend using the setting 'Manually set by Administrator'.



10. Select if you wish for the user (i.e. the person booked into the course) to be able to change their classroom session date. It is recommended to set this to 'No', as changes should be made through the **Client Portal.** If you select 'Yes', the person booked into the classroom session can change their date if there are available alternative session dates.

NOTE: If the leaner changes the date, the session will **NOT** be updated in the Client Portal and therefore, the classroom list will be inaccurate.

	Nev	v tac	ce to	o tao	je ev	ent	mc	Juu	IC	
Use th	e face to fa	ace even			tup even multiple (		sers to	atten	d. Events	s can
Details										
Event titl	e									
Examp	le Course						L			
Event de	scription 🕜	)								
В	I <del>S</del>	w,	Ξ	Ξ :	≡≡	≔		Ξ×		
	the Event "F						1			
	the Event "F illy set by A					>				
Manua		dministra	ator	sion		>				
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Manua Allow the	elly set by A	dministra change t	ator heir ses			>				
Manua Allow the	elly set by A	dministra change t	ator heir ses			>				
Manua Allow the	e learner to e learner to	dministra change t	ator heir ses			>				
Manua Allow the Allow the <b>Outcome</b>	e learner to e learner to	dministra change t	ator heir ses			>				
Manua Allow the Allow the <b>Outcome</b>	e learner to e learner to e learner to e learner to	dministra change t cancel th	ator heir ses							
Manua Allow the Allow the Outcome Outcome	e learner to e learner to e learner to	dministra change t cancel th continui	ator heir sess neir sess	sion		>				



11. 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 'View details' and then click on the 'Change Session' button. Upon selecting the alternative date, they will be booked into the new date.

0/6	Site Familiarisation - Classroom Induction			
•	Site Familiarisation - Classroom induction	Event	Attending	View details

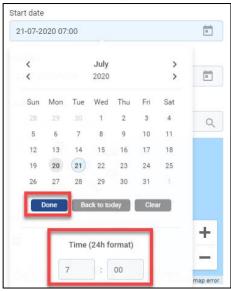
#### 12. The outcome details should be set as per below.

Outcome	
Outcome if failed	
Prevent user from continuing	>
Allow Course to be passed overall even if this module is failed?	

#### 13. To add a session – Click 'Add Session'

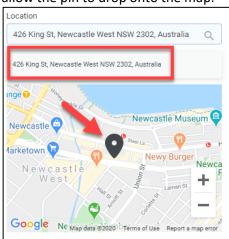
Sessions		
+ Add session		

14. In the 'Start date' field - add start date and time, then click 'Done'. Then in the 'End date' field - add the finish date and time, then click 'Done'.





15. Type the address in the 'Location' field and click search. You must click on the address that is found to allow the pin to drop onto the map.



16. Enter the maximum number of attendees which can be allocated to the course - add this amount to the 'Available seats' field. If you do not add an amount, the number of attendees will be unlimited. If there is a date that the induction will close for bookings, toggle the 'Set enrolment cut-off date' and then select the date and time that you require the induction to close. This function will stop any further bookings been placed at the selected time.

Available seats		
10		\$
Set enrolment cut-off da	ite	

- 17. Click 'Save'. You will now have 1 session listed under sessions.
- To create more sessions hover your mouse over the newly created session towards the right you will see 3 options appear. Click on the middle option which is 'duplicate'. The new session will appear. You will need to add the details required for the new session and save.



19. You must then select 'Save' on the next screen. Your sessions will not save if you miss this step.

Outcome	2		
Outcome	e if failed		
Preven	t user from continuing	>	
Allow Co this mod	urse to be passed overall even if ule is failed?		
Sessions	3		
+	Add session		
0	426 King St, Newcastle West NSW 2302, Australia 21-07-2020 07:00 to 21-07-2020 13:00		
		Save	ancel



20. Click on the 'Information' tab

COURSE CONTENT	INFORMATION	SETTINGS	CUSTOMISATION	View Course Page	💦 Course Insight	Copy Course

21. You should see the Course Details. Scroll down to the 'Author Details'. The 'Author Name' should be entered as the client name. There is no need for an 'Author Email Address'. Select 'Save Changes'.

· · · · · · · · · · · · · · · · · · ·		
Author Details		
Author Name John Holland		
Author Email Address		
Author Description B / ↔ & J I E E E E	i≡ i≣ I <sub>x</sub>	
	Cours Observers	alar (an alara
	Save Changes	Clear form changes

22. Move across to the 'Settings' tab.

COURSE CONTENT	INFORMATION	SETTINGS	CUSTOMISATION	View Course Page	💦 Course Insight	Copy Course

23. Under the 'Settings' tab, go to the 'Access settings' and **deselect all** options for 'All learning space users' and 'User not logged in'. None of the boxes as highlighted in the image below should be ticked.

Access settings							
Configure who can view and enrol in the cour complete the course once enrolled. Group-sp							
	View	Enrol	Mandatory	7 Time limit 🕐			
All learning space users				e.g. 7	Days	>	
Users not logged in							
Group-specific access							
Select or type a group name							
View Enrol Mandato	ry	Time lim	it: 🛛 e.	g. 7 Day	rs >		Add
No groups selected							



24. Under 'Section Access' it is recommended to set 'Allow the user to access sections in any order' to OFF.



25. Select 'Save Changes'.

#### 26. Finally, under the 'Customisation' tab.

- 27. 'Default course layout' should be set to 'Full course page'
- 28. 'Enable course reviews' needs to be changed to off as below.

Enable course reviews
-----------------------

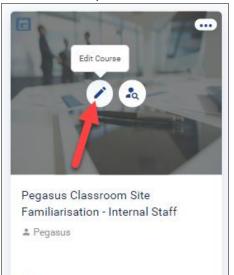
29. Select 'Save Changes'.

#### HOW TO ADD OR EDIT CLASSROOM SESSIONS AFTER THE INITIAL SET UP

1. Click on 'Courses', then 'All Courses'.

	,								
			Home Course	es My Profile People	Reports				
			_	-					
	_								
MY COURSES	ALL COURSES	ARCHIVED				+ Create course	Q	==	=

2. Find the course you need to edit and hover on the course tile and click the pencil.





3. On the 'Course Content' page, locate the event module and click the pencil as below.

#1	Pegasus Classroom Site Familiarisation - Inter	rnal Staff	$\sim$
9	Pegasus Site Familiarisation - Internal Staff	Event	

- 4. Follow from step 13 to 19, of the 'HOW TO CONFIGURE A CLASSROOM BOOKING IN OUR LMS' to add a new session.
- 5. If you are wanting to edit a session. E.g. To change the seating capacity or time etc. Locate the session from the list, click the pencil to edit and complete the required changes.



#### HOW TO CONFIGURE A SINGLE SCORM ONLINE COURSE IN OUR LMS

1. Ensure you are logged into the LMS as an Administrator. To know this, you will need to go to the 'My Profile' tab. Next to 'Learning space access level' you will see your access type, which should be 'Client Administrator'.

User info	
Username	
Email	
Password	*****
Member since	-
Learning space access level	Client Administrator 🧪
Primary manager	-
Secondary manager	-

- 2. Click on the 'Courses' tab.
- 3. Click on 'All Courses' and click 'Create course'.

	Home Courses My Profile People Reports		
MY COURSES ARCHIVED		← Create course Q	



4. Enter the course name, change the course category using the drop-down box to 'Online'. Upload a thumbnail image and the header image for the course.

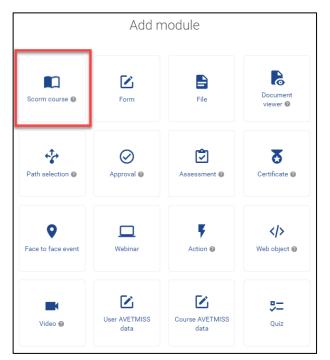


5. Under the 'Course Content' tab, click on 'Add Section' and name this section, the name of the course e.g. Pegasus Classroom Office Induction and select 'Submit'.



6. Click on 'Add Module' and select 'Scorm course'.







7. Add the 'Module title', this should be the name of the course. (Content type label not required)

New SCORM course module
The SCORM module allows you to upload a SCORM package. Find out more about SCORM <u>here</u> .
Details
Module title
Content type label
e.g. Online course

- 8. Upload the course file must be a zip file, maximum size 5MB and then click save. If the file size is larger than the acceptable size you will need to contact Pegasus for assistance.
- 9. Do not attempt any other actions while saving is in progress.

#1	Example Course	
	Example Course (Processing 50%)	Online course
+	Add Module	

10. Once the course has uploaded, you need to hover your mouse over the right-hand side and click the pencil to edit.



- 11. The 'Outcome' should be left as default 'Prevent the user from continuing'.
- 12. 'Allow the course to be passed overall even if this module is failed?' should be left as default No.



13. Scroll to the bottom and click on 'Scorm cloud settings'

Outcome	
Outcome if failed	
Prevent the user from continuing	>
Allow Course to be passed overall even if this module is failed?	
SCORM Cloud settings 🗸	

14. The Scorm Cloud settings that you should select for a course created in Storyline or Studio:

aunch behaviour 🔞	
New Window	>
atest version rollover @	
Always	>
Maximum suspend data size	
64000	<b>(</b>
Score rollup mode	
Average Score of All Units with Scores	>
Number of scoring objects	
0	-
Status rollup mode	
Complete When All Units are Complete and N	ot Fail >
Threshold score for completion (0.0 - 1.0)	
0	<b> </b>
Return to LMS action	
Suspend All	>
Apply rollup status to success status	
First SCO is pretest	
New window desired full screen	
Rollup at SCO unload	
invoke rollup at suspend all	



15. The Scorm Cloud settings that you should select for a course created in Rise:

aunch behaviour 🛞	
New Window	>
atest version rollover 🎯	
Always	>
Aaximum suspend data size	
64000	÷
core rollup mode	
Average Score of All Units with Scores	>
lumber of scoring objects	
0	٤
itatus rollup mode	
Complete When All Units are Complete and Not Fa	il 🔉
hreshold score for completion (0.0 - 1.0)	
0	٢
eturn to LMS action	
Selectable	>
pply rollup status to success status	
irst SCO is pretest	
lew window desired full screen	
tollup at SCO unload	
nvoke rollup at suspend all	

16. Click on the 'Information' tab.

COURSE CONTENT	INFORMATION	SETTINGS	CUSTOMISATION	View Course Page	🖍 Course Insight	Copy Course

17. You should see the Course Details. Scroll down to the 'Author Details'. The 'Author Name' should be entered as the client name. There is no need for an 'Author Email Address'. Select 'Save Changes'.

thor D thor N Iohn H												
thor Er	mail A	ddres	3									
thor D	escrip	tion										
В	I	8	¢ <sup>9</sup> ,	۵ <u>.</u>	Ξ	Ξ	Ξ	Ξ	 Ξ	I.		



18. Move across to the 'Settings' tab.

COURSE CONTENT	INFORMATION	SETTINGS	CUSTOMISATION	View Course Page	瀺 Course Insight	Copy Course

19. Under the 'Settings' tab, go to the 'Access settings' and deselect all options for 'All learning space users' and 'User not logged in'. None of the boxes as highlighted in the image below should be ticked.

Access settings								
Configure who can view and enrol in the course and who the course is mandatory for, as well as how long learners have to complete the course once enrolled. Group-specific access and time limits override the settings for all learning space users.								
	View	Enrol	Mandatory	Time limit 🕜				
All learning space users				e.g. 7	Days	>		
Users not logged in								
Group-specific access	Group-specific access							
Select or type a group name								
View Enrol Mandatory Time limit: ( e.g. 7 Days > Add								
No groups selected								

20. Under 'Section Access' it is recommended to set 'Allow the user to access sections in any order' to OFF.



- 21. Select 'Save Changes'.
- 22. Finally, under the 'Customisation' tab.

- 23. Default course layout should be set to 'Full course page'
- 24. 'Enable course reviews' needs to be changed to off as below.

Enable course reviews	
-----------------------	--

25. Select 'Save Changes'.



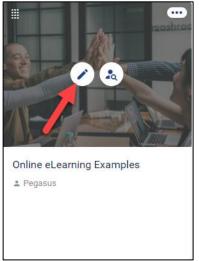
#### HOW TO CONFIGURE A MULTI-SCORM ONLINE COURSE IN OUR LMS

1. Follow the steps above on 'HOW TO CONFIGURE A SINGLE SCORM ONLINE COURSE IN OUR LMS'. Ensure you are uploading the second course in the first section so that the pass mark is not awarded on completion of the first Scorm course.

#1	Example Course	
	Example Course	Online course
	Example Course 2	Online course
+	Add Module	

#### **HOW TO COPY A COURSE**

- 1. Once you have created a course, you are able to use the course as a template for another course.
- 2. Go to the tile you wish to use and click the edit button.



3. Click on copy course – NOTE; There is often a time delay while the course copy's, refrain from clicking 'copy course' again. Once the course is copied, you will need to update the tabs – 'course content, information, settings and customisation', with the information of the new course.

COURSE CONTENT	INFORMATION	SETTINGS	CUSTOMISATION	View Course Page	撬 Course Insight	Copy Course



#### **COMMUNICATION EMAILS A LEARNER RECEIVES**

- 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 is meant regarding the links for point 2: Acceptance link: <u>https://visy.lms.poweredbyonsite.com/acceptInvitation</u>/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

3. 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.

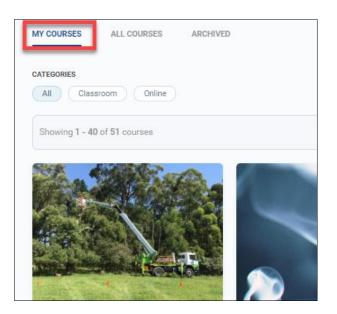
Pegasus Powered by Onsite
Pegasus Demonstration - Invitation
Hello Sarah, As part of your compliance to work for Cross Yarra Partnership, you must successfully complete the following training - . <u>CYP Online Induction</u> . <u>CYP Project Induction</u> . <u>Session: 30 Oct 2018 8:00AM</u> . <u>Cultural Awareness e Learning</u> . <u>CYP Global Mandatory Requirements</u> . Your <u>username</u> for logging ir 015180
Click <u>here</u> to read our terms and conditions on course cancellations, notice period required to move a face to face course, and expiry of online course bookings. <u>Peaasus Demonstration</u> @ 2018 Pegasus



4. When you enrol a learner through the Client Portal, the user which is completing the enrolment will always receive a copy of the invitation that the learner receives. Below is an example of the invitation from the Client Portal.

Whitehaven Coal Clui Account Invitation
Hello Lisa,
As part of your compliance to work for Whitehaven Coal Clui
Account,
you must successfully complete the following training -
Generic Induction and Narrabri Surface Induction
Your <u>username</u> for logging in is <b>PEG</b>
Click here to get started

5. 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:

Select a report type	$\sim$
All users	
All course enrolments for all users	
All enrolled users for a single course	
Avetmiss NAT Files	
Sales	
Detailed Enrolment Reports	
Certificates for a course	

#### 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.

1	A	В	С	D	E	F
1	User ID	First name	Last name	Email address	Current status	Event Dates
2		Louisa	Boulton		Yet To Start	Pegasus Classroom Office Induction - 17/05/2017 18:00
3		Brooke	Cronin		Yet To Start	Pegasus Classroom Office Induction - 17/05/2017 18:00
4		Rhiannon	Manning		Yet To Start	Pegasus Classroom Office Induction - 17/05/2017 18:00
5		Pru	Killick		Yet To Start	Pegasus Classroom Office Induction - 30/05/2017 15:00
6		Sarah	Spurling		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.

	Deurs	Report Coloring and drop to re-ord		pport	
	Columns to inclu	de in report			
	User ID				
	First name				Remove
t Ner	Last name				Remove
plete	Email address	Filter by email			Remove
	Current status	Filter by status			
form	Event Dates				Remove
	Enrolment date	<b>I</b>	09 May 2017 11:4	जी	Remove
room	Completion date	<b>I</b>	30 May 2017 13:3	। ज	
even	Historical status	Filter by status	05 Jun 2017 08:30	>	Remove
	Total time spent				
	Certificates				
	Custom fields	_			Remove



#### HOW TO DOWNLOAD AN ATTENDANCE REPORT

To do this:

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



- 2. b. Scroll down until you see 'Who's Signed Up'.
- 3. c. Select the date from the 'Filter by Event' that you wish to run the attendance report from.

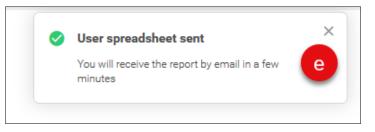


4. d. Click on the download icon that is next to the 'Filter by Event' dropdown.

	Who's Signed Up								
Status Completed In Progress Yet To Start	Inactive		•						
Select Multiple Users		Newcastle West - 18/06/2018	d ک						
BC Berta Collins	MB Molly Brown	DC Damien Challen	KT Kat Training Issue						
Yet To Start	Yet To Start	Yet To Start	Invited						
KS Katrina Soffer	ST Siobhan ThirdReenrol	DC Damien Challen	KF Kat FailTest						
Invited	Failed	Deleted	Failed						
CR Classroom Renrol Paypal	TC Training Classroomrenrol	AB Amanda Butler	DT Demo Tester						
Yet To Start	Passed	Yet To Start	Yet To Start						
AB Adam Boyle	MB Mousumi Bhattacharya	SS Sarah Spurling	LC Lauren Chock						
Yet To Start	Yet To Start	Yet To Start	Yet To Start						

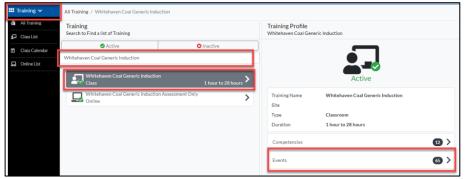


5. e. The attendance report will then be sent to the email address of the administrator downloading it.

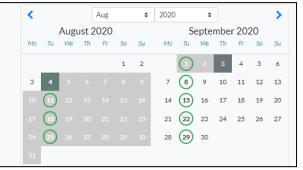


#### HOW TO DOWNLOAD AN ATTENDANCE REPORT FROM THE CLIENT PORTAL

- 1. Log into the Client Portal
- 2. Click training
- 3. Search for the course in the search bar
- 4. Click on the course name and click Events



5. Use the calendar to select the date you require



6. Click Print Sheet





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

1. Click on 'People' tab



- 2. Search for the learner you wish to mark as passed
- 3. Click on the learners name

Search resu	ults for "Knapman" Ilear Search					+ Invite and assign All g	roups	> Knapman	×
□ ~	NAME .		ACCOUNT STATUS	LAST STEN	DAYS ACTIVE (4 WKS)	ALL COURSE PROGRESS		ROLE	
	Lisa Knapman	-	Enabled	03 Aug 2020 11:08	3	-	1/3		

4. Click on the 'Course' tab

Lisa Knapman Last Login 04 August 2020					
	COURSES	EVENTS			

- 5. Search for the course you wish to mark the learner as passed and click on that course
- 6. Click on View details

		Lisa Knapman		
	Course insight View Course	View history Download re	port	
	(	Course content		
0/2	Pegasus Classroom Site Familiarisation - Inte	rnal Staff		
•	Pegasus Site Familiarisation - Internal Staff	Event	Attending	View details
8	Completion Certificate	Certificate		Actions



7. Click on Set status

Internal Staff T	-	miliarisation - Internal Staff
	Start Time	7 Jun 2019 05:55 AM
	End Time	7 Jun 2019 08:25 AM
	Location	426 King St, Newcastle West NSW 2302, Australia, Newcastle West
	Bishopspate St Station St astle Interchange	Dy
	Spotlight Newcastle 🖨	- Newcastle Museum
	The Edwards King St Newcastl Vest	e Hunter St Newy Burger New castle Civic Park Tyrrell St Laman St St St St St St St St St St
		castle Number borts Ground Map data ©2020 Google Terms of Use Report a map error
	T Add to calendar	nge session 🖉 Set status 🖉 Cancel event enrolment

8. Click on Competent. The person is now passed.

Current status:	×
Attending Competent Not yet competent	]

# PASS OUT A COURSE FOR A GROUP OF LEARNERS

1. Click on 'All Courses' tab

			Home	Courses	My Profile	People	Reports	
MY COURSES	ALL COURSES	ARCHIVED						



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



3. 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.

All enrolments Showing 3 enrolments Clear filters		Showing all groups	> Newcastle - 16/	/07/2019 10:00 >	Ŀ	۹ 🔳
□ NAME	ACCOUNT STATUS	LAST LOGIN	ENROLMENT STATUS	EVENT STATUS	MODULE PROGRESS 🔞	LAST AC
Sarah Constable	Enabled	15 Jun 2020 13:06	O YET TO START	ATTENDING	0/6	_
Lisa Knapman	Enabled	04 Aug 2020 12:05	O YET TO START	ATTENDING	0/6	-
Gretchen Noble	Enabled	17 Oct 2019 08:40	O YET TO START	ATTENDING	0/6	-

4. Tick the box beside all the learners that you wish to mark as passed and select 'View event details'.

	3 enrolments selected 🛛 🖉 Edit enro	olments 🔀 View event details	Cock enrolments	× Unenrol learners		Clear sel	ection
M	NAME	ACCOUNT STATUS	LAST LOGIN	ENROLMENT STATUS	EVENT STATUS	MODULE PROGRESS Ø	LAST /
	Sarah Constable	Enabled	15 Jun 2020 13:06	O YET TO START	ATTENDING	0/6	-
	Lisa Knapman	Enabled	04 Aug 2020 12:05	O YET TO START	ATTENDING	0/6	
	Gretchen Noble	Enabled	17 Oct 2019 08:40	O YET TO START	ATTENDING	0/6	
4							+



# 5. Select 'Set to Competent'.

his is an ex	ample of a Classroom train	ing booking.		
	Start Time	16 Jul 2019 10:00	AM	
	End Time	16 Jul 2019 11:00	AM	
	Location	34 King St, Newcas Newcastle	stle NSW 2300, Australia,	
	and the second sec	and the second s	Nobbys Beach Foreshore Park	
	istle Park Park Proventing Coogle	N e w c a s e James Fletcher Hospita Newcastle Beach Reserve Rd	New castle East Newcastle C + - Terms of Use Report a map error	
	Notes	Please go to Level	2 for your training.	
		Char	nge session 🖉 Remove from sess	sion
		🥪 Set to Co	mpetent Set to Not yet compet	tent



6. If anyone failed, tick the box beside their name and click set to not competent.

	Site Famili	arisation - Classroom induction
		3 learners
This is an exar	nple of a Classroom tra	aining booking.
	Start Time	16 Jul 2019 10:00 AM
	End Time	16 Jul 2019 11:00 AM
	Location	34 King St, Newcastle NSW 2300, Australia, Newcastle
	Dyke Poir Q wuter St. Park Three su. Coogle	Nobbys Beach Useens Wharf Hotel Wharf Rg Ne w c a site James Fletcher Hospital Newcastle & Beach Newcastle & Beach Meg data 82020 Boogle Terms of Use Report a map emor
	Notes	Please go to Level 2 for your training.
		Change session Remove from session
		Set to Competent
		Done

#### HOW TO CHANGE A LEARNER'S CLASSROOM COURSE DATE THROUGH THE LMS

# It is recommended to use the Client Portal for dates changes. The below method is only to be used when the Client Portal is not available.

If you proceed with this method of transfer – the competency will not assign into onsite at completion of the induction and will need to be manually assigned to the learners onsite profile.

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





2. Scroll down until you see all enrolments in the course and search for the learners name. Tick the box next to the learners name.

Search results for "Knapman" Showing 1 enrolment Clear Search		Showing all groups 3	Showing all event sess	sions 🔸 🛓 Kr	apman	•	Enrolment History Download Report View user profile
1 enrolment selected   G Edit enrolment	Lock enrolment 🙁 U	nenrol learner			CI	t) ((	View event details Edit enrolment
NAME	ACCOUNT STATUS	LAST LOGIN	ENROLMENT STATUS	MODULE PROGRESS Ø	LAST ACCESSED M	Ô	Lock enrolment Unenrol learner
Lisa Knapman	Enabled		O YET TO START	0/6			•••

# 3. Select 'Change Session'.

	Site Familiaris	ation - Classroom i	nduction
		Lisa Knapman	
This is an exam	ple of a Classroom training b	booking.	
	Start Time	16 Jul 2019 10:00 AM	
	End Time	16 Jul 2019 11:00 AM	
	Location	34 King St, Newcastle NSW 23 Newcastle	00, Australia,
	Dyke Point Queens		Foreshore Park
	Wharf		
	sunter St. state Park "Immer or booms St. "And" The Hill S	erre Rd Map date \$2020 Google Terms of Use	Newcastle (
	Notes	Please go to Level 2 for your to	raining.
	🔁 Add	to calendar 🔀 Change session	Remove from session
		Set to Competent	Set to Not yet competent
			Done



4. Click on the new date and click select session

Event Module	Event Date Selection
Select session - Site Familia	arisation - Classroom induction
Select a session for the event:	Show all locations
Site Familiarisation - Classroom induction 0 sessions available	July 2018 🗸
21 Nov 2019 10:00 - 21 Nov 2019 11:00	June 2019 🗸
34 King St, Newcastle NSW 2300, Australia	July 2019 🗸
	August 2019 🗸
	September 2019 🗸
	October 2019 🗸
	Neverther 2010
	4 21 Nov 2019 10:00 - 21 Nov 2019 11:00
	December 2019 🗸
	February 2020 🗸
	Select session Cancel

5. Click on 'Done'.

🔁 Add to calendar	ট Change session	Remove from session
	Set to Competent	Set to Not yet competent
		Done

#### HOW TO REMOVE A LEARNER FROM A CLASSROOM COURSE THROUGH THE LMS

It is recommended to use the Client Portal to remove a learner. The below method is only to be used when the Client Portal is not available.

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 'Unenrol learner'.

Search results for "Knapman" Showing 2 enrolments Clear Search		Showing all groups	> Filter by event se	ession >	Knapman	×
□ NAME	ACCOUNT STATUS	LAST LOGIN	ENROLMENT STATUS	MODULE PROGRESS 🕖	LAST ACCI	ESSED MODULE
Lisa Knapman	Enabled	09 Jul 2020 15:18	COMPETENT	11/11		
Lisa Knaoman	Enabled	07 Aug 2020 18:40	O YET TO START	0/11		<ul><li>Enrolment History</li><li>Download Report</li></ul>
4						<ul> <li>View user profile</li> <li>View event details</li> </ul>
						Edit enrolment     Lock enrolment
					-	* Unenrol learner

#### HOW TO REMOVE A LEARNER FROM A CLASSROOM COURSE THROUGH THE CLIENT PORTAL

- 1. Log into client portal and click on training
- 2. Search for the course that the learner is booked into, click on the course name, click events and select the date

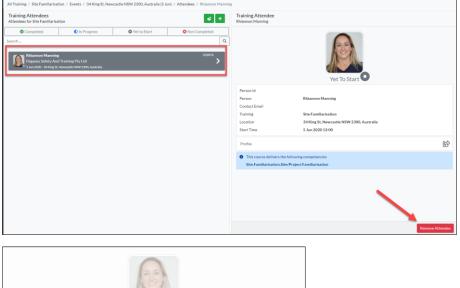
🛢 Training 🗸	All Training / Site Familiarisation	
🕺 All Training	Training	Training Profile
Class List	Search to Find a list of Training	Site Familiarisation
Class Calendar	Active S Inactive	
🖵 Online List	site familiarisation	
	Pegaus Site Familiarisation - Contractors     30 minutes to 90 minutes     Pegaus Site Familiarisation - Delivery Personnel     Class     Pegaus Site Familiarisation - Manual Handling     Pegaus Site Familiarisation - Manual Handling	Active Training Name Site Familiarisation Site Type Classroom
	Pegasus Site Familiarisation - Office Worker Class 30 minutes to 150 minutes >	Competencies
	Class 1 hour	Events 15 >



3. Click attendees and click on the learners name

All Training / Site Familiar	risation / Events / 34 King St, Newcastle NSW 2300, Australia (5 Jun) /	/ Attendees				
Training Event 34 King St, Newcastle NSV	W 2300, Australia		Attendees for Site Familiarisa	tion		s +
	Yet to Start	Search_	Completed Rhiannon Manning Pegasus Safety And 5 Jan 2020 - 34 King St.		• Yet to Start	Not Completed
Training Start End Instructor Venue Capachy Attendees	Mie Familiarnation Fri Jano 52 2020 1:200 PM Fri Jano 52 2020 0:500 PM 34 King SL, Newcastle NSW 2200, Australia 20	1 >		$\mathbf{N}$		
Documents		Add Document				
		Print Sheet				

4. Click the remove attendee button and click yes



	Yet To Start	
Person Id		
Person	Rhiannon Manning	
Contact Email		
Training	Site Familiarisation	
Location	34 King St, Newcastle NSW 2300, Australia	
Start Time	5 Jun 2020 12:00	
Profile		Ŕ
This course delivers t	he following competencies	
Site.Familiarisation.	ite/Project Familiarisation	
Site.Familiarisation.	ite/Project Familiarisation	V

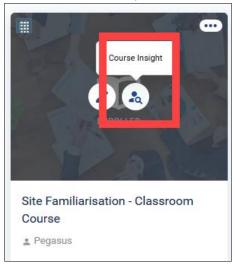


#### HOW TO ASSIGN A COURSE TO A LEARNER THROUGH THE LMS

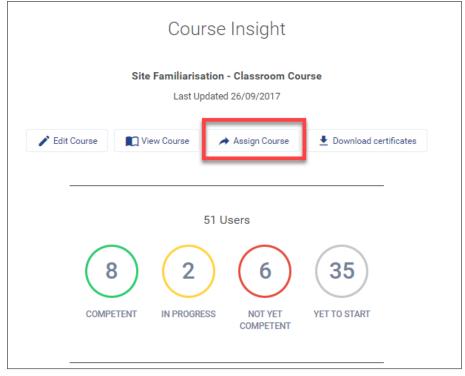
It is recommended to use the Client Portal to assign a course to a learner. The below method is only to be used when the Client Portal is not available.

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

1. Go to the course that you would like to add the learner to and click on 'Course Insight'.



2. Click on 'Assign Course'





3. Add the learners email address and click add. You can repeat the process and add other leaners to the course. Once you have finished adding the leaners, you can then add a message if required. Then click 'Continue'.

Select courses to assign 1 course	
	~
+ Select and invite users	^
Add new or existing users by adding their e CSV file. Then, optionally, assign them to c	
Email address or username	
test@pegasus.net.au	
First name (Optional)	ast name (Optional)
	+ Add
Bulk upload users	
Download CSV template	Upload CSV file
Send email to users with links to their assig	aned courses

#### HOW TO ADD A LEARNER INTO A COURSE THROUGH THE CLIENT PORTAL

- 1. Log into client portal and click on training
- 2. Search for the course that you want to book the learner into.
- 3. Click on the course name and click events

🎞 Training 🗸	All Training / Site Familiarisation				
All Training	Training Search to Find a list of Training		Training Profile Site Familiarisation		
<ul> <li>Class List</li> <li>Class Calendar</li> </ul>	C Active	8 Inactive			
Online List	site familiarisation				
	Pegasus Site Familiarisation - Contracto Class	30 minutes to 90 minutes		Active	
	Pegasus Site Familiarisation - Delivery P Class	Personnel 30 minutes to 1 hour	Training Name Site	Site Familiarisation	
	Pegasus Site Familiarisation - Manual Ha	andling	Type Duration	Classroom	
	Pegasus Site Familiarisation - Office Wo Class	rker 30 minutes to 150 minutes	Competencies	1 hour	•
	Site Familiarisation Class	1 hour <b>&gt;</b>			
			Events 📥		15 >



4. Use the calendar to locate the date that you want to add the learner into and click where you see the event details

All Training / Site Familiari	sation / Events															
Training Profile Site Familiarisation			Training Events Events for Site Familiarisati	on												
			Completed						O Yet	to Star	t					8 Cancelled
	• _]			<			Jun		٥	2020		٠			>	
	Active			Mo	Ju	ine 20	Fr	Sa	Su	Мо			2020 Th F	) r Sa	Su	
Training Name	Site Familiarisation			1 1			5						2 3		5	
Site				8 9	9 10	0 11	12	13	14	6	7	8	9 1	0 11	12	
Туре	Classroom			15 1	6 17	7 18	19	20	21	13	14	15	16 1	7 18	19	
Duration	1 hour			22 2	3 24	25	26	27	28	20	21	22	23 2	4 25	26	
Competencies		• >		29 3	0					27	28	29	30 3	1		
Events		15	34 King St, Newca 5 Jun 2020 12:00	stle NS	5W 23	00, Au	stralia									0 of 50

#### 5. Click attendees

aining Events ents for Site Familiar	isation														Training Event 34 King St, Newcastle NSW 2300, Australia	
🖉 Comple	ted						<b>O</b> Ye	t to Sta	rt							
	<				Jun		\$	2020		¢				>		
				e 20							y 20					
	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su		Yet to Start
	1	2	з	4	5	6	7			1	2	3	4	5		
	8	9	10	11	12	13	14	6	7	8	9	10	11	12	Training Site Familiarisa	
	15	16	17	18	19	20	21	13	14	15	16	17	18	19	Start         Fri Jun 05 2020           End         Fri Jun 05 2020	
	22	23	24	25	26	27	28	20	21	22	23	24	25	26	End Fri Jun 05 2020	01:00 PM
	29	30						27	28	29	30	31				rcastle NSW 2300, Australia
															Capacity 50	
📩 34 King St, Ne	wearth	NEW	12201		trolia										Attendees	Non
34 King St, Ne 5 Jun 2020 12:00	Weaser.		200	, <b>, , , .</b>												
															Documents	1 Aug Doc

#### 6. Click the '+' to add the learner

All Training / Site Familia	risation / Events / 34 King St, Newcastle NSW 2300, Australia (5 Jun) /	Attendees				
Training Event 34 King St, Newcastle NSV	W 2300, Australia		Training Attendees Attendees for Site Familiarisa	tion		s +
	<b></b>		Completed	In Progress	• Yet to Start	🙁 Not Compared
	<b>H</b>		Search			٩
Training	Yet to Start Site Familiarisation					
Start	Fri Jun 05 2020 12:00 PM Fri Jun 05 2020 01:00 PM					
Instructor	FR JUN 05 2020 01:00 PM					
Venue	34 King St, Newcastle NSW 2300, Australia					
Capacity	50					
Attendees		None 💙		I	attendees found	
Documents		+ Add Document		No attendees matching the	e search criteria could be found	



7. Search for the learners name and click on their name. Click add.

Add Attendee to Training	pard	📫 Pegasus Demo	onstration	-	<b>⊖</b> User ∨
Knapman	/ Events / 34 King St, New	vcastle NSW 2300, Australia (5 Ju	n) / Attendees /	Add	
Any Crew  Any Types				* +	Add Attendee Select Attendee
Lisa Knapman PEGASUS MANAGEMENT PTY, LIMITED	In Progress	• Yet to Start	🙁 Not Cor	mpleted Q	Worker
1					Contact Email
					Worker must have a valid Email address to be added to the training.
					Training Site Familiarisation
		•			Date 19/08/2019
	no matching	attendees found			Training Location
		e search criteria could be found			34 King St, Newcastle NSW 2300, Australia
					Start Time
					10:00 AM
Cancel Add					

#### 8. Click on Save

Add Attendee Select Attendee	
Worker	
Lisa Knapman	***
Contact Email	
Training	
Site Familiarisation	
Date	
19/08/2019	
Training Location	
34 King St, Newcastle NSW 2300, Australia	
Start Time	
10:00 AM	
	<u> </u>
	Cancel Save



#### HOW TO RESET A LEARNERS LMS PASSWORD

- 1. Log into the LMS where the learner holds the booking
- 2. Click on the People tab

Pegasus	Home Courses My Profile People Reports

3. Search for the learner using the search bar and click on the learners name

USERS	SROUPS						
Search re Showing 2 users	esults for "Knapman" © Clear Search			+ Invite and assi	gn All groups	>	Knapman X
	NAME -	ACCOUNT STATUS	LAST SEEN	DAYS ACTIVE (4 WKS)	ALL COURSE PROGRESS		ROLE
	Lisa Knapman	Enabled	06 Aug 2020 18:57	5		2/4	
	Lisa Knapman	Enabled	14 Jul 2020 09:44	1		1/2	

4. Hover over to the left of the word password and when you see the pencil, click the pencil

Email	
Password	******
Member since	-
Learning space access level	Learner

5. Add the new password, repeat and submit

	Edit password	>
New password		
Repeat new password		
		Submit

#### 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.

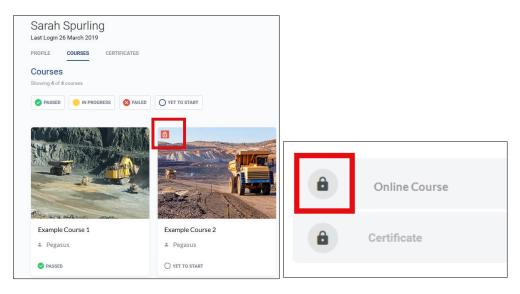


- 2. Scroll down to the section that shows 'Who's Signed Up'
- 3. Click on the person's name.
- 4. Click the ellipsis (three dots next to their name) and select 'Lock enrolment'.

		Who's Si	gned Up 🚹		
PASSEE	IN PROGRESS SFAILED YET TO STA	RT			
All enro	Iments				٩
	rolment selected 🧭 Set enrolment status				Clear selection
Le l'en	roiment selected Set enroiment status				Clear selection
	NAME	ACCOUNT STATUS	LAST LOGIN	ENROLMENT STATUS	
	Sarah Constable SConstable@pegasus.net.au	Enabled	08 Mar 2019 07:51	PASSED	Enrolment History     Download Report
	Sasd.cooney@hotmail.com	Enabled	08 Mar 2019 08:04	O YET TO START	View user profile Notify Admins
	St	Enabled	08 Mar 2019 08:04 25 Sep 2018 11:37	<ul><li>○ YET TO START</li><li>⊘ PASSED</li></ul>	
	sd.cooney@hotmail.com				Votify Admins

To unlock the rearrier, up 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.

				Home Courses My Profile	People Reports
Users Groups					
All users Showing 1 - 50 of 94 users					
NAME 🔺	ACCOUNT STATUS	LAST SEEN	DAYS ACTIVE (4 WKS)	ALL COURSE PROGRESS	ROLE
Pegasus Administrator CluiAdmin@pegasus.net.au	Active	_	_	0/0	_

2. Then select 'Edit' next to the person's name and correct the name accordingly.

_	us Administrator
PROFILE	COURSES

3. 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.

#### **AVETMISS MODULES – HOW TO CONFIGURE**

To be able to configure a course that is linked to a Registered Training Organisation (RTO), you will first need to enter the RTO's details under the Learning Space Avetmiss tab. See image below.

	Home Courses My Profile Peop	le Reports	Sarah Spurling 👻	
			1 🌣 Learning space settings	
			🕞 Log out	
Learning space settings				
LEARNING SPACE DETAILS AVETMISS WEBHOOKS BI	LLING INFO SETTINGS ACCESS LEVE	LS ACTIVITY LOG CUSTOMISATION	N	
The following information is required to generate AVETMISS Nat files. To collect AVETMISS data within a course, be sure to include both the User AVETMISS and Course AVETMISS modules. Training organisation identifier				
Training organ	isation name			
Training organ	isation type identifier			

Once you have completed the above, you can then create a course and use the two Avetmiss modules. They are: User Avetmiss data and Course Avetmiss data and you will see these under 'Add Modules' within a course. Refer to the sections above on how to create either an online or classroom course.



Add module			
User AVETMISS	Course AVETMISS		
data	data		

The User Avetmiss data is a form that the learner is required to complete. Please note that there is no verification via the LMS of the learner's USI number. This is the responsibility of the client to verify this.

Avetmiss Data Collection				
AVETMISS stands for the Australian Vocational Education and Training				
Management Information Statistical Standard. It is a national data standard that				
ensures consistent and accurate capture and reporting of Vocational Education and				
Training (VET) information about students. The training provider is required to				
collect this information. This information will only be shared with the training				
provider. <u>Click here for more information</u>				
Country of Residence				
Which country do you live in?				
Australia				
O Other(please specify)				
Please specify >				

The Course Avetmiss data is the Avetmiss details for that particular course. You might have a course that is made up of multiply modules that are approved to be delivered on your scope as a single course or part of a larger course. In that case you can add the course Avetmiss data module at the start of each course. NOTE: The Course Avetmiss data is not visible for the learner and is needed to be placed behind the User Avetmiss data module.

If a learner is enrolled into a course that is linked to Avetmiss, they will have a field for Avetmiss under their profile and they can review and edit the details they submitted in that form.

Sarah Spurling Last Login 27 April 2020		
PROFILE COURSES		
User info Username	44888	
Email	sspurling@pegasus.net.au	
Password	********	$\left( \begin{array}{c} 0 \end{array} \right) \left( \begin{array}{c} 0 \end{array} \right) \left( \begin{array}{c} 1 \end{array} \right)$
Member since	23 October 2017	
Learning space access level	Administrator	IS FAILED YET TO START
Primary manager	-	
Secondary manager	-	
Avetmiss	Review Avetmiss details	Learner can review and update their Avetmiss details under their profile.



Under Reports tab you have an Avetmiss NAT files report that compiles the three components required for submission to NCVER for RTO reporting. They include RTO's details, learner's details, and the Course Avetmiss details.

Create new report					
	Reports allow you to export your learning space data for users, enrolments and more. You can only export data according to your permissions in Clui.				
What do you wa	int to report on?				
Course enrolments	User information	Form values	AVETMISS NAT files		
Report name					
Filters					
Avetmiss					
Include disab	oled users				
Scheduling a rep current data and	Set a report schedule Scheduling a report enables you to periodically regenerate the report with the most current data and email it to specified recipients. You can include up to five schedules per report and an unlimited number of recipients per schedule.				
senedules per re			recipiento per e	onedale.	
Add a set	chedule				
			Create re	port Cancel	