LMS Configuration Procedure for Client Administrators

Contents

![Pegasus - Powered by Onsite]

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

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

Header Image

Recommended format:
1600px X 480px jpeg

Select Image

Logo

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

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

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'. • Can view their own certificates from all the enterprises. Access this via the 'My Profile' tab. • Can view 'My Calendar', if they have a booked classroom event. • Can change their own email and password. • 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:** • See the 'Settings' and 'Sales' tab • Remove users from group • Add users to group • Edit group settings • Create and delete groups • Remove, Deactivate or Reactivate Users • Create a course • Delete or archive a course • Assign a user access level
Pegasus Administrator	**Have the same rights as an Administrator, but they are not able to:** • View/Edit Enterprise Details • View/Edit AVETMISS settings • View/Edit Webhooks • View/Edit Billing info • View/Edit Settings • View/Edit Roles • View/Edit Enterprise Access Levels • View/Edit Group Access Levels • View/Edit Customisation • See the 'Sales' tab • Create and delete groups • Edit group settings
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'.

2. Click on the 'Courses' tab.

3. Click on 'All Courses' and click 'Create course'.

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.

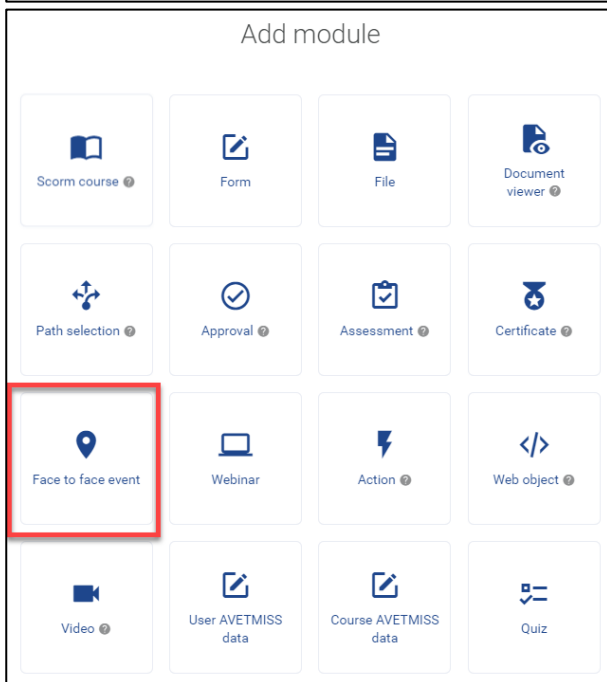5. Under the 'Course Content' tab, click on 'Add Section' and name this section, the name of the course e.g. Pegasus Classroom Office Induction and select 'Submit'.
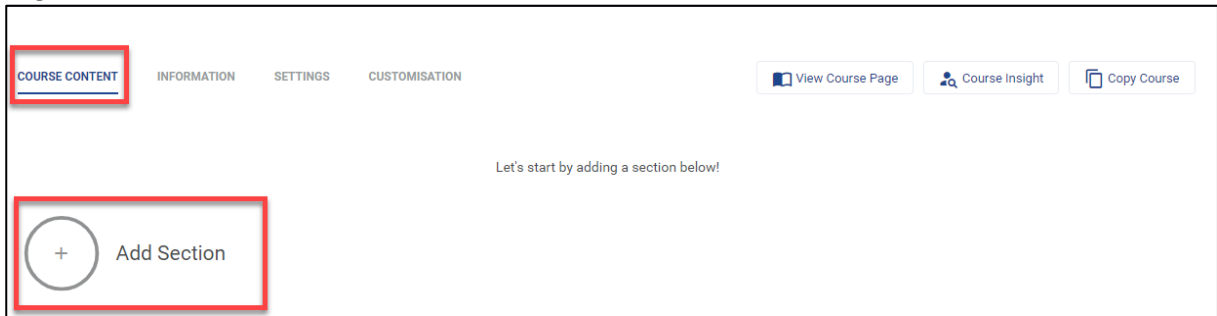
6. Click on 'Add Module' and select 'Face to Face Event.

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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.

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.
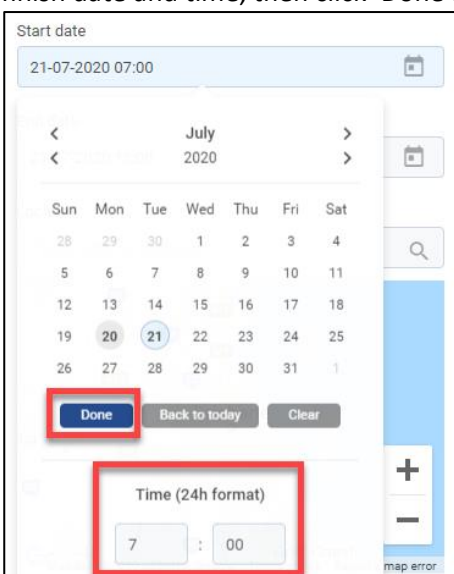
0/6	Site Familiarisation - Classroom Induction			
📍	Site Familiarisation - Classroom induction	Event	Attending	View details
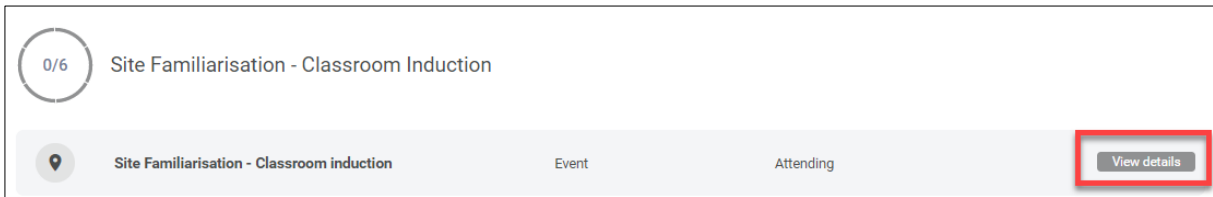
12. The outcome details should be set as per below.

Outcome

Outcome if failed

Prevent user from continuing	>

Allow Course to be passed overall even if this module is failed?
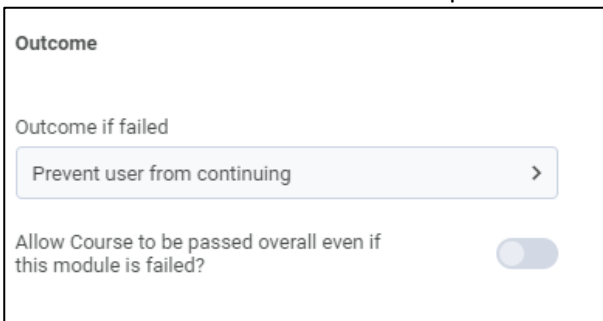
13. To add a session – Click 'Add Session'

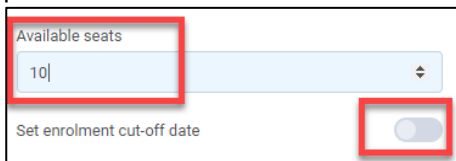**Sessions**

+   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'.

Start date

21-07-2020 07:00

| < | | July | > |
| < | | 2020 | > |

Sun	Mon	Tue	Wed	Thu	Fri	Sat
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

Done   Back to today   Clear

Time (24h format)

7 : 00

map error

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.
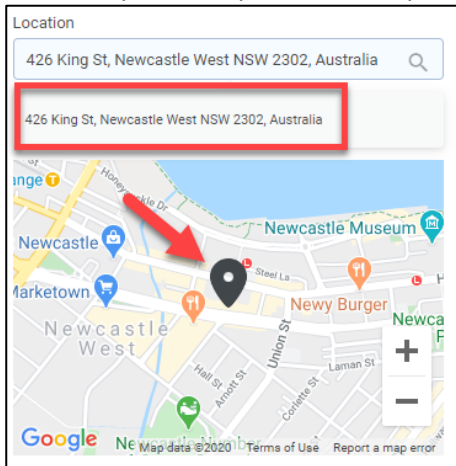

16. Enter the maximum number of attendees which can be allocated to the course - add this amount to the 'Available seats' field. If you do not add an amount, the number of attendees will be unlimited. If there is a date that the induction will close for bookings, toggle the 'Set enrolment cut-off date' 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.
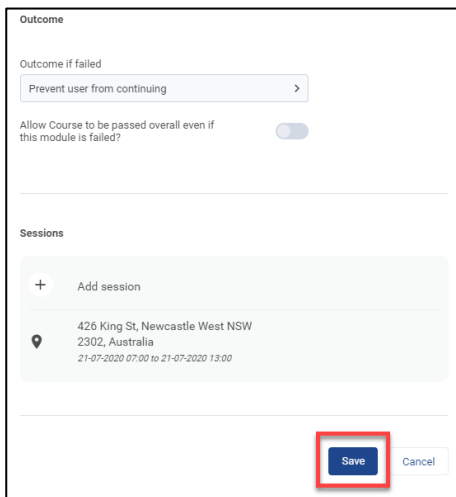

17. Click 'Save'. You will now have 1 session listed under sessions.

18. 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.
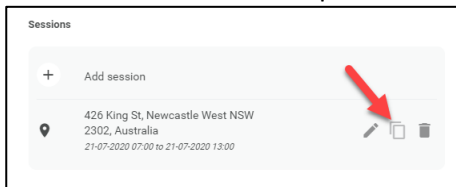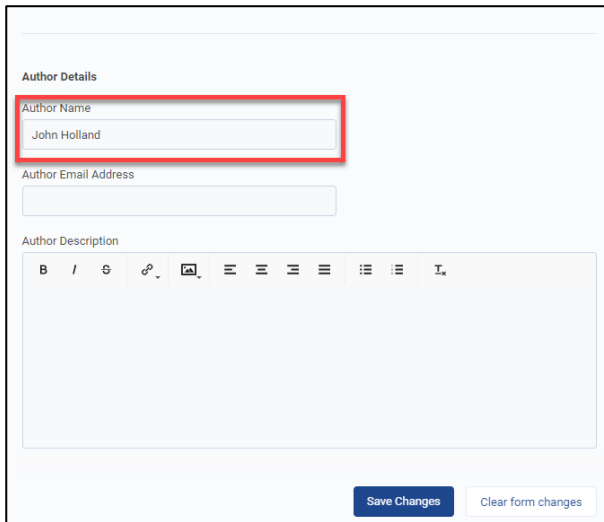

19. You must then select 'Save' on the next screen. Your sessions will not save if you miss this step.

20. Click on the 'Information' tab

COURSE CONTENT   **INFORMATION**   SETTINGS   CUSTOMISATION   📖 View Course Page   👤 Course Insight   📄 Copy Course
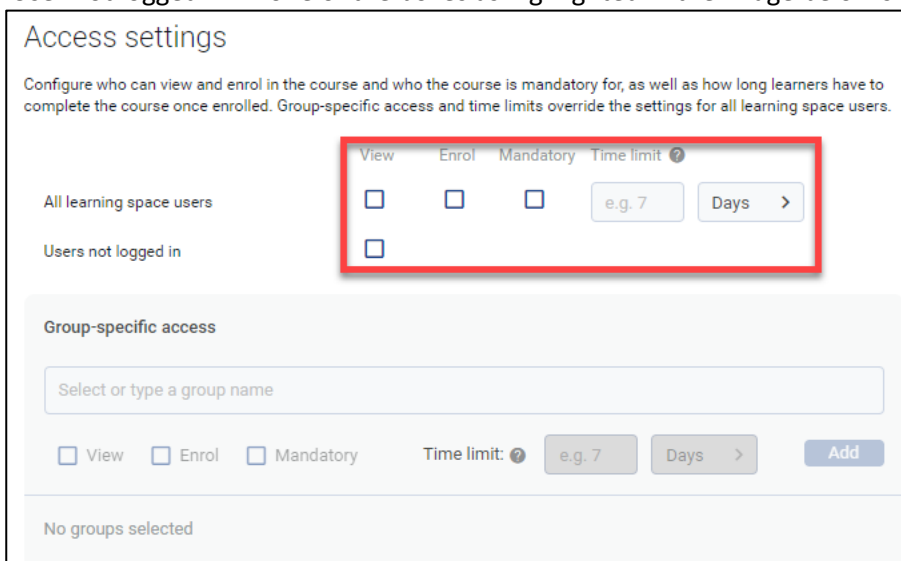
21. You should see the Course Details. Scroll down to the 'Author Details'. The 'Author Name' should be entered as the client name. There is no need for an 'Author Email Address'. Select 'Save Changes'.

Author Details

Author Name

John Holland

Author Email Address

Author Description

B *I* S   🔗 🖼️   ≡ ≡ ≡ ≡   ≔ ≔   T_x

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 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

Select or type a group name

☐ View   ☐ Enrol   ☐ Mandatory   Time limit: ❓   e.g. 7   Days >   **Add**

No groups selected

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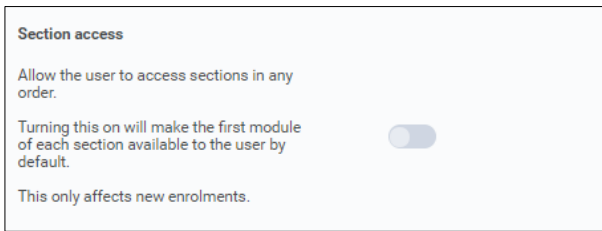
25. Select 'Save Changes'.

26. Finally, under the 'Customisation' tab.

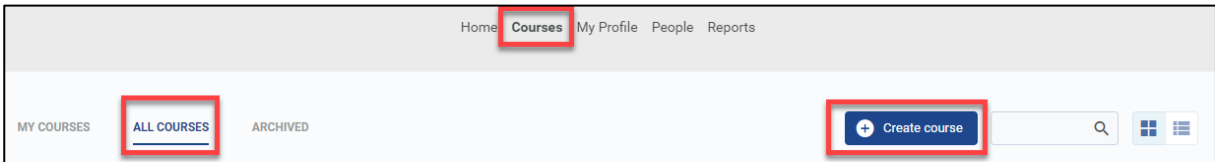27. 'Default course layout' – should be set to 'Full course page'

28. 'Enable course reviews' needs to be changed to off as below.

29. Select 'Save Changes'.

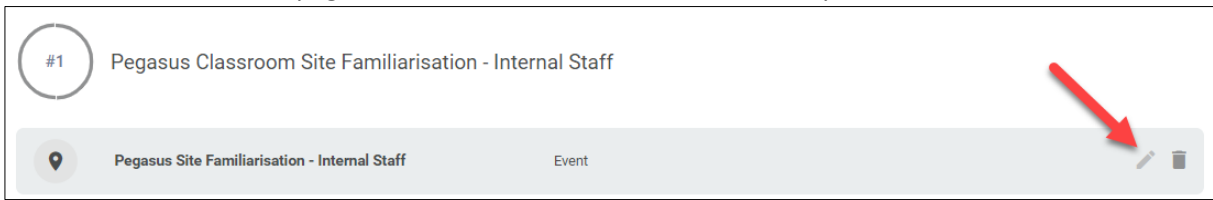## HOW TO ADD OR EDIT CLASSROOM SESSIONS AFTER THE INITIAL SET UP

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

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

12

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

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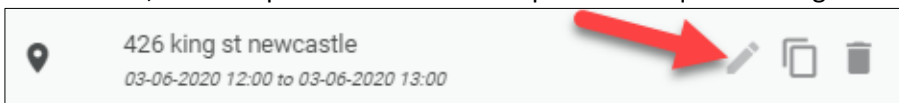
HOW TO CONFIGURE A SINGLE SCORM ONLINE COURSE IN OUR LMS

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'.

2. Click on the 'Courses' tab.

3. Click on 'All Courses' and click 'Create course'.
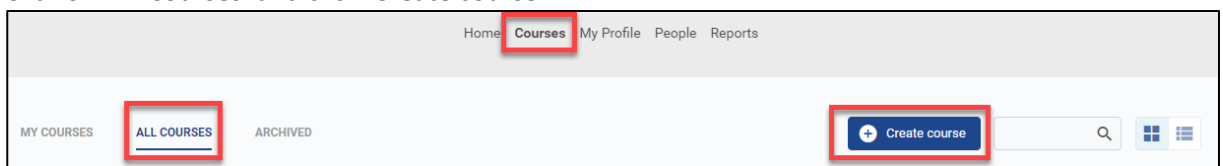
4. Enter the course name, change the course category using the drop-down box to 'Online'. Upload a thumbnail image and the header image for the course.

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 here.

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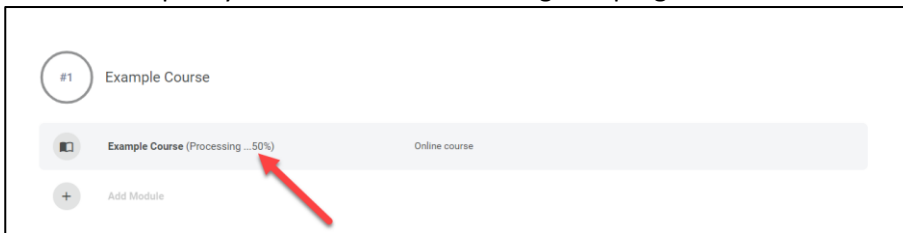
10. Once the course has uploaded, you need to hover your mouse over the right-hand side and click the pencil to edit.

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

#1   Example Course

Example Course   Online course

+   Add Module
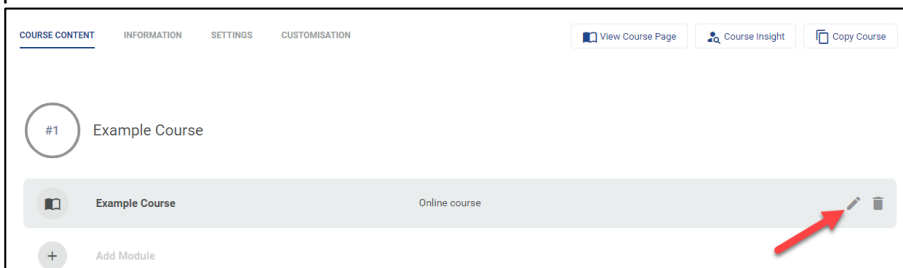
11. The 'Outcome' should be left as default – 'Prevent the user from continuing'.

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'

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

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

16. Click on the 'Information' tab.

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'.

18. Move across to the 'Settings' tab.

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.

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.

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.
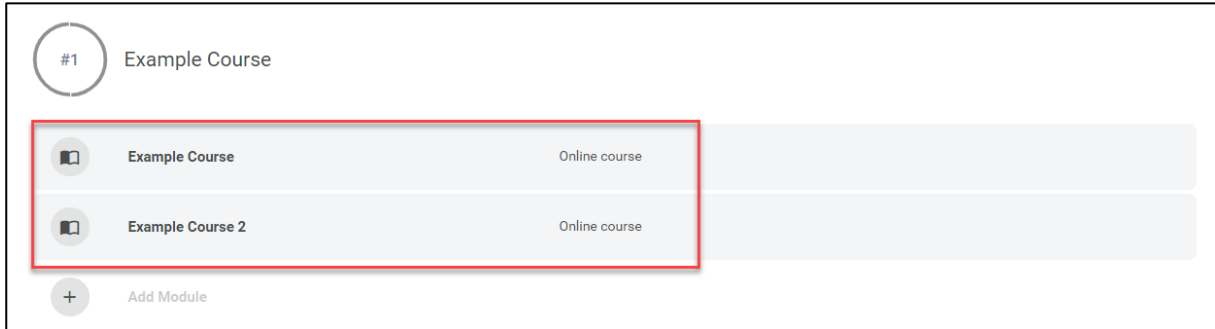
HOW TO COPY A COURSE

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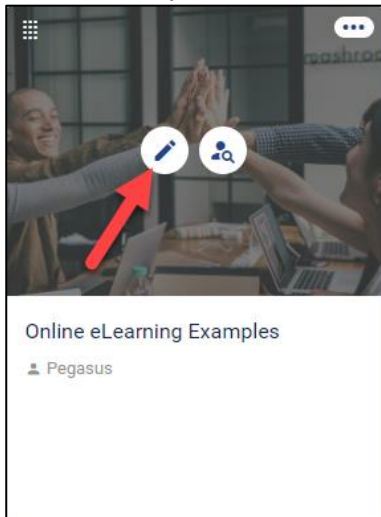
3. Click on copy course – NOTE; There is often a time delay while the course copy's, refrain from clicking 'copy course' again. Once the course is copied, you will need to update the tabs – 'course content, information, settings and customisation', with the information of the new course.

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 is meant regarding 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

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.

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.
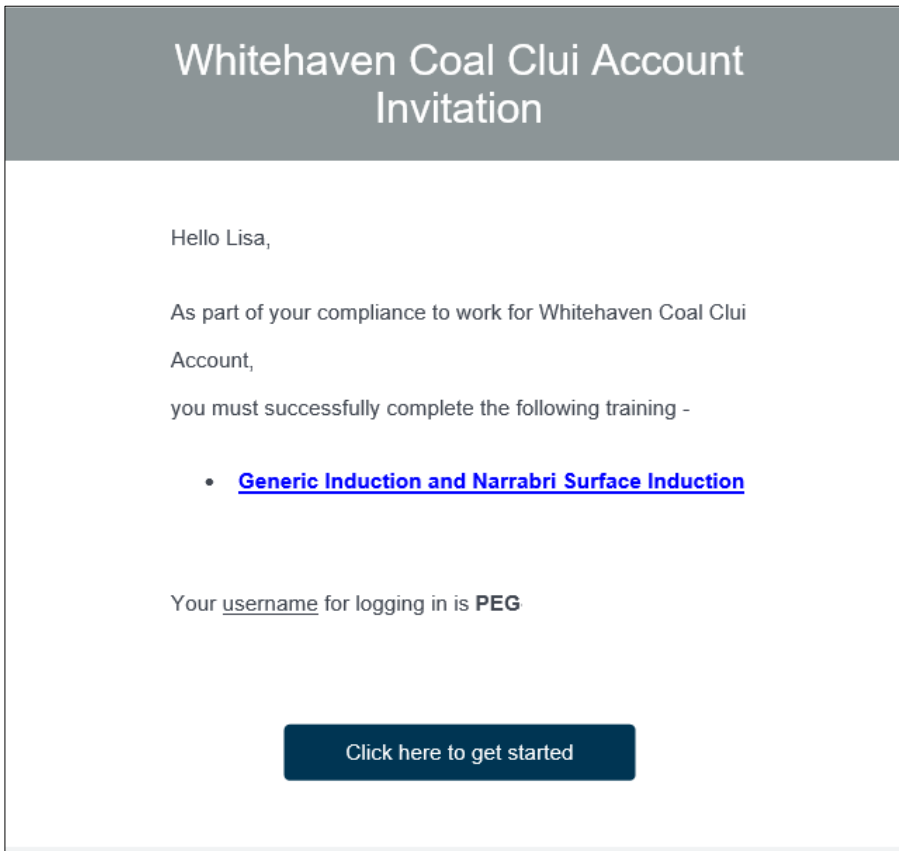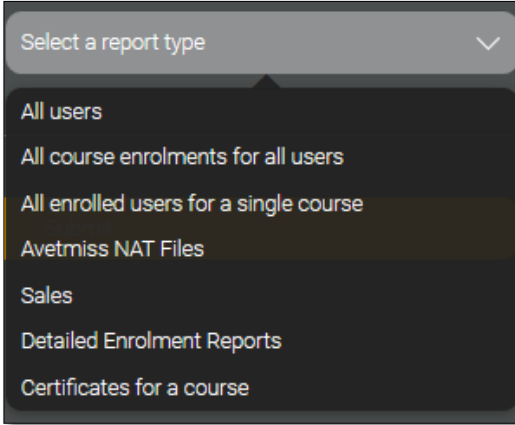

5. Upon logging in as a learner, click on the 'My Courses' tab, where the learner will be able to see all courses in the various status i.e. 'Yet to Start', 'In Progress', 'Passed' and 'Failed'.
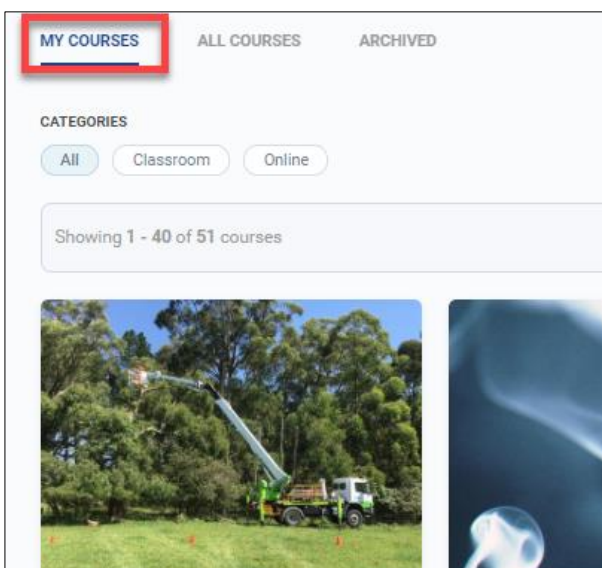
REPORTS

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

Select a report type

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.

	A	B	C	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.

Report Columns
Drag and drop to re-order the columns

Columns to include in report

User ID   Remove
First name   Remove
Last name   Remove
Email address   Filter by email   Remove
Current status   Filter by status   >   Remove
Event Dates   Remove
Enrolment date   📅   📅   Remove
Completion date   📅   📅   Remove
Historical status   Filter by status   >   Remove
Total time spent   Remove
Certificates   Remove
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.
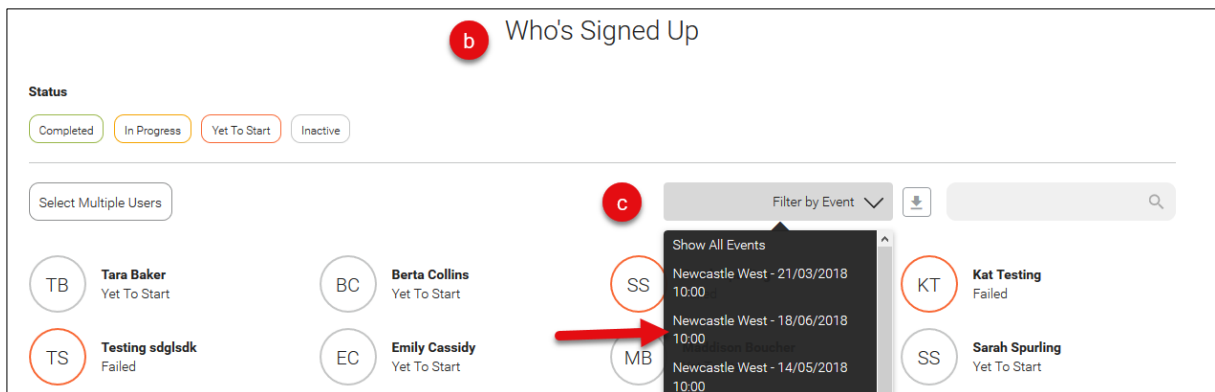
4. d. Click on the download icon that is next to the 'Filter by Event' dropdown.
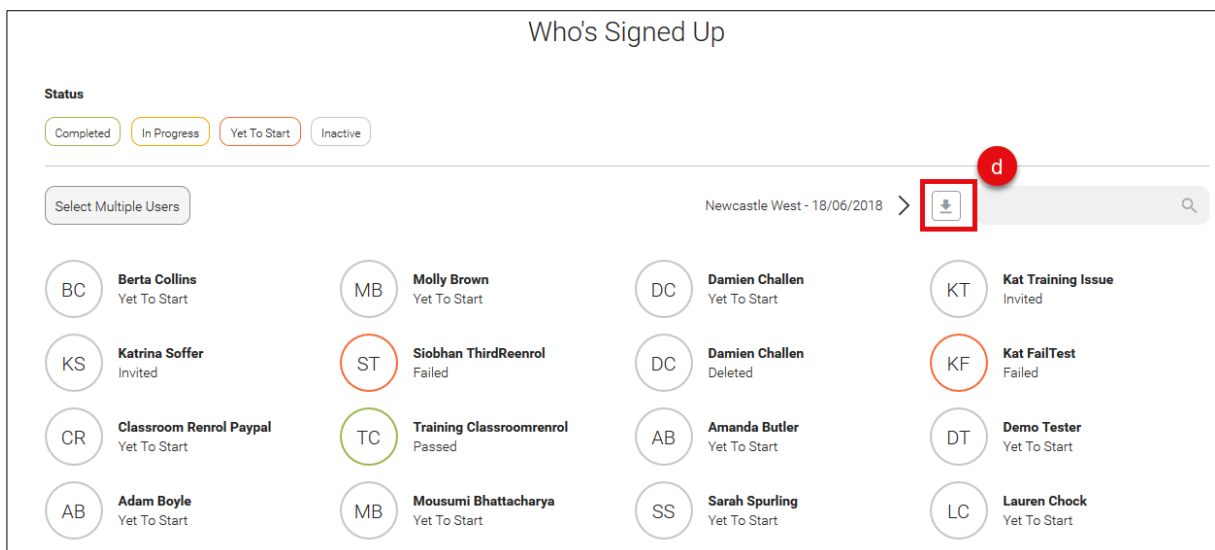
5. e. The attendance report will then be sent to the email address of the administrator downloading it.
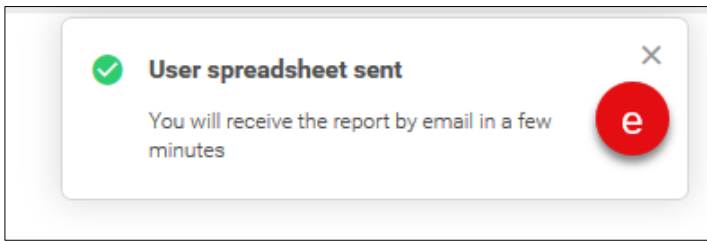
HOW TO DOWNLOAD AN ATTENDANCE REPORT FROM THE CLIENT PORTAL

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
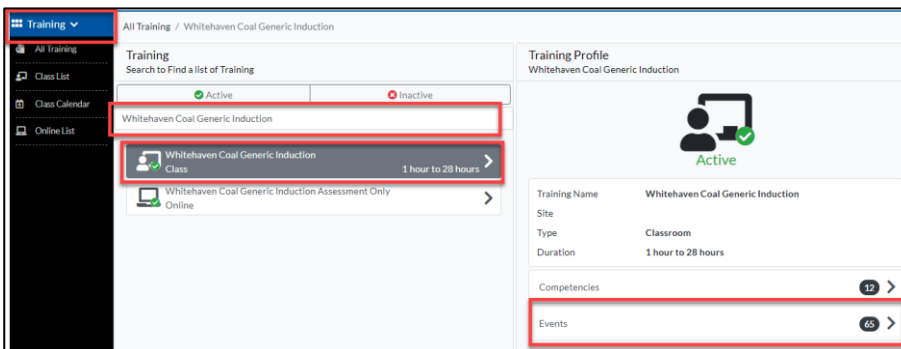
5. Use the calendar to select the date you require
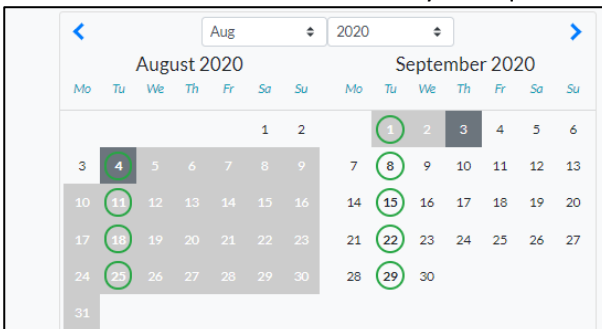
6. Click Print Sheet

24
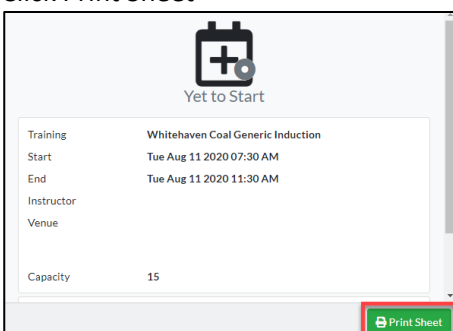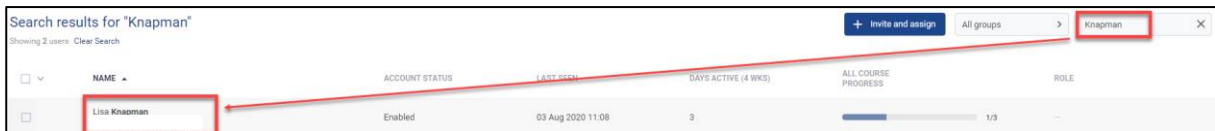
PASS OUT A COURSE FOR A LEARNER (NOT A GROUP OF LEARNERS)

1. Click on 'People' tab
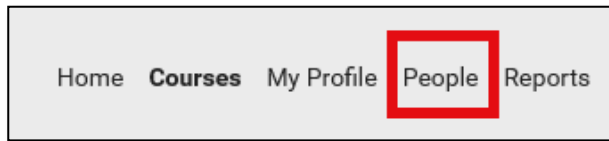
2. Search for the learner you wish to mark as passed

3. Click on the learners name
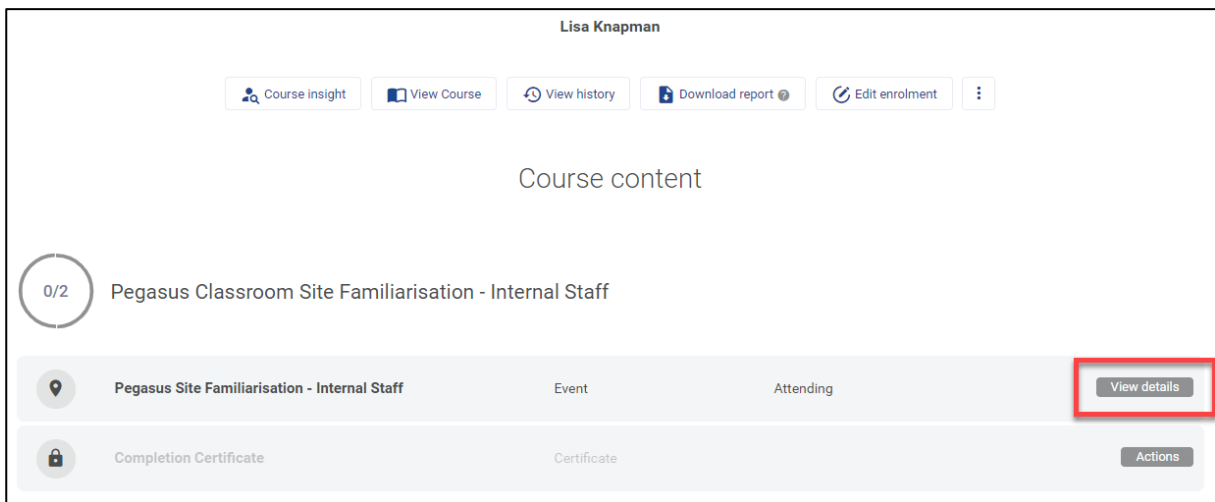
4. Click on the 'Course' tab
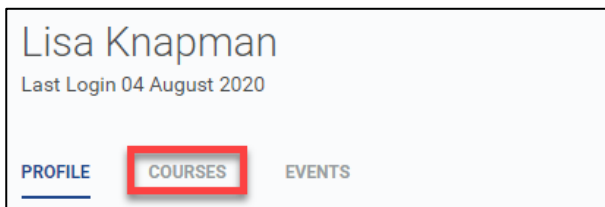
5. Search for the course you wish to mark the learner as passed and click on that course

6. Click on View details

7. Click on Set status

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

PASS OUT A COURSE FOR A GROUP OF LEARNERS

1. Click on 'All Courses' tab

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

Pegasus Classroom Site
Familiarisation - Contractors

👤 Pegasus

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

	NAME	ACCOUNT STATUS ▲	LAST LOGIN	ENROLMENT STATUS	EVENT STATUS	MODULE PROGRESS ❓	LAST AC
☐	Sarah Constable	Enabled	15 Jun 2020 13:06	◯ YET TO START	🟡 ATTENDING	▭ 0/6	—
☐	Lisa Knapman	Enabled	04 Aug 2020 12:05	◯ YET TO START	🟡 ATTENDING	▭ 0/6	—
☐	Gretchen Noble	Enabled	17 Oct 2019 08:40	◯ 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 enrolments   📋 View event details   🔒 Lock enrolments   👥 Unenrol learners   Clear selection

	NAME	ACCOUNT STATUS ▲	LAST LOGIN	ENROLMENT STATUS	EVENT STATUS	MODULE PROGRESS ❓	LAST A
☑	Sarah Constable	Enabled	15 Jun 2020 13:06	◯ YET TO START	🟡 ATTENDING	▭ 0/6	—
☑	Lisa Knapman	Enabled	04 Aug 2020 12:05	◯ YET TO START	🟡 ATTENDING	▭ 0/6	—
☑	Gretchen Noble	Enabled	17 Oct 2019 08:40	◯ YET TO START	🟡 ATTENDING	▭ 0/6	—

5. Select 'Set to Competent'.

Site Familiarisation - Classroom induction

3 learners

This is an example of a Classroom training booking.

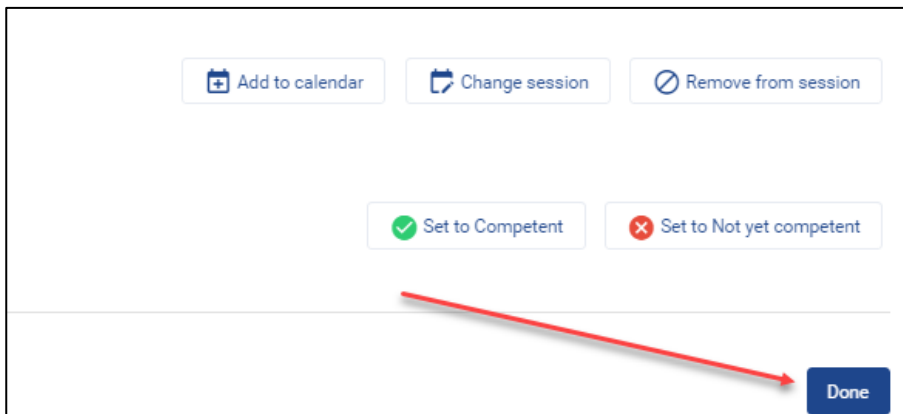|	
Start Time	16 Jul 2019 10:00 AM
End Time	16 Jul 2019 11:00 AM
Location	34 King St, Newcastle NSW 2300, Australia, Newcastle

Notes: Please go to Level 2 for your training.

Change session   Remove from session

Set to Competent   Set to Not yet competent

Done

6. If anyone failed, tick the box beside their name and click set to not competent.
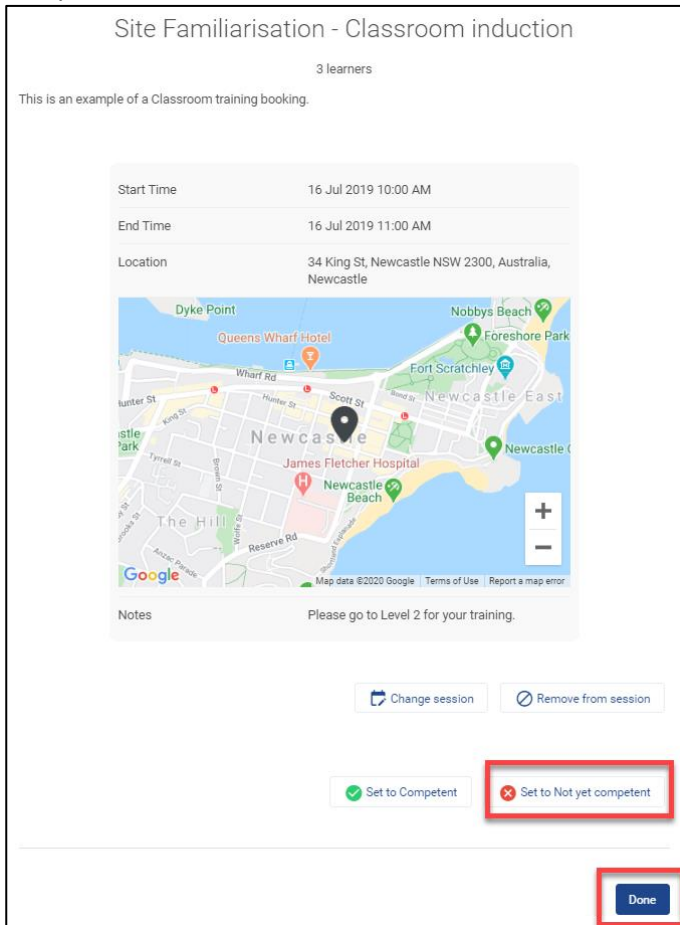
HOW TO CHANGE A LEARNER'S CLASSROOM COURSE DATE THROUGH THE LMS

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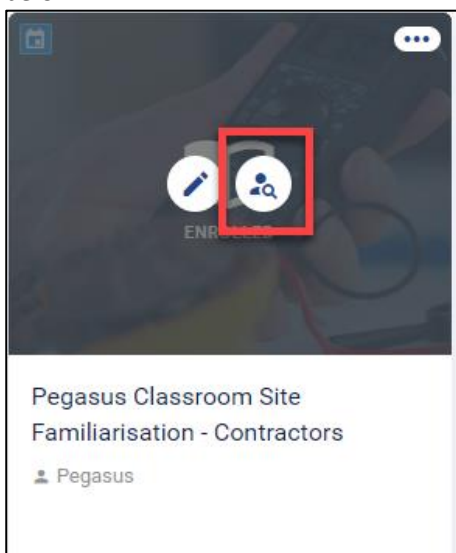
2. Scroll down until you see all enrolments in the course and search for the learners name. Tick the box next to the learners name.

3. Select 'Change Session'.

4. Click on the new date and click select session
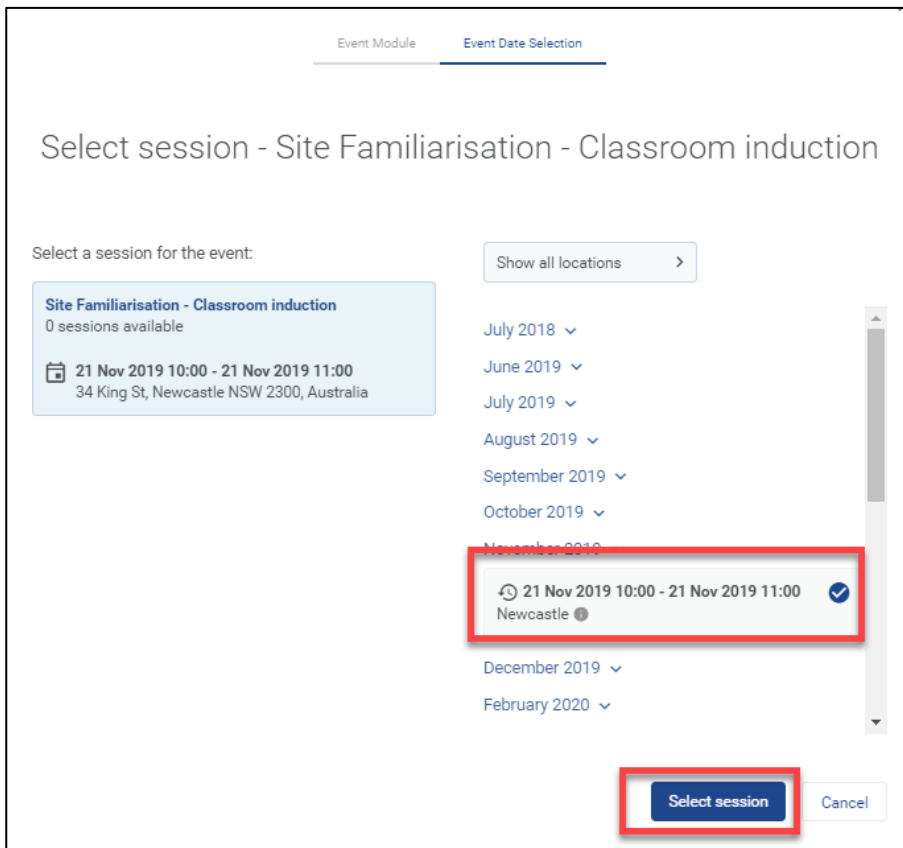
5. Click on 'Done'.


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.
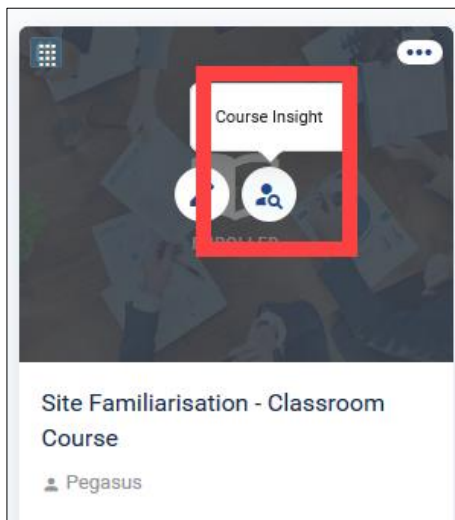
2. Then scroll down until you see all enrolments in the course and search for the learner you wish to remove from the course. Once you find that learner, click on the three dots to the right of their name and select 'Unenrol learner'.
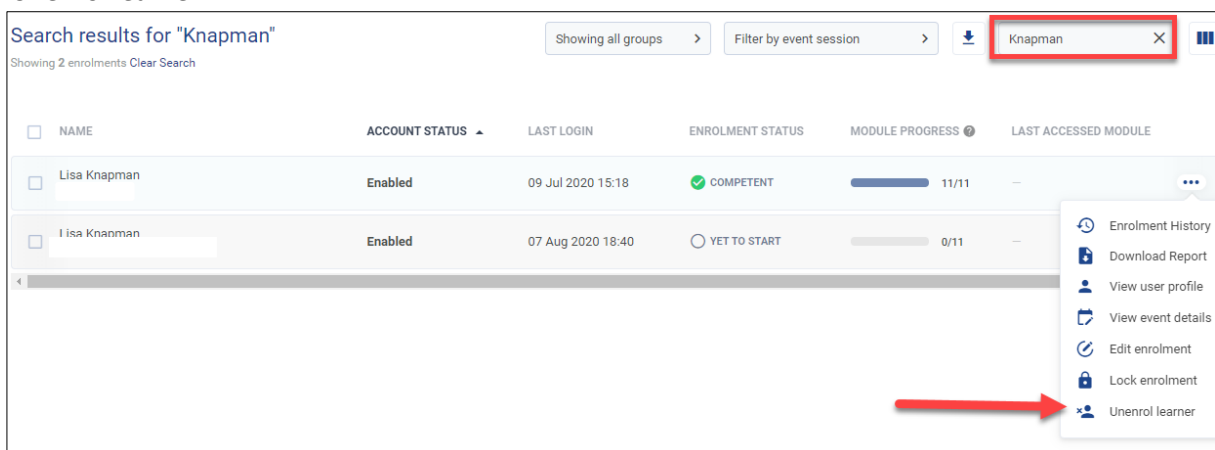
HOW TO REMOVE A LEARNER FROM A CLASSROOM COURSE THROUGH THE CLIENT PORTAL

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
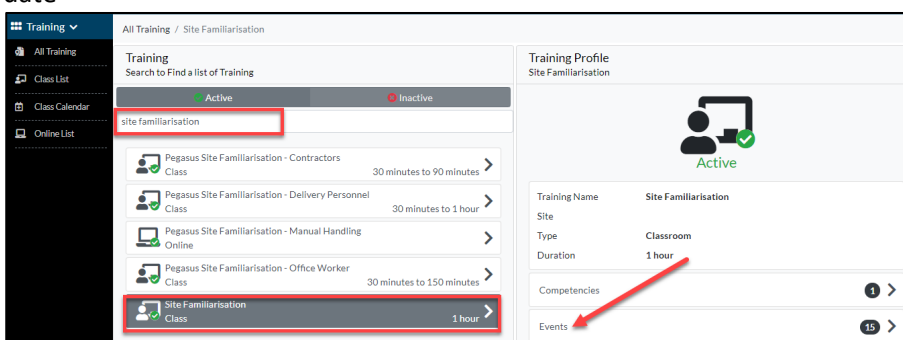
3. Click attendees and click on the learners name
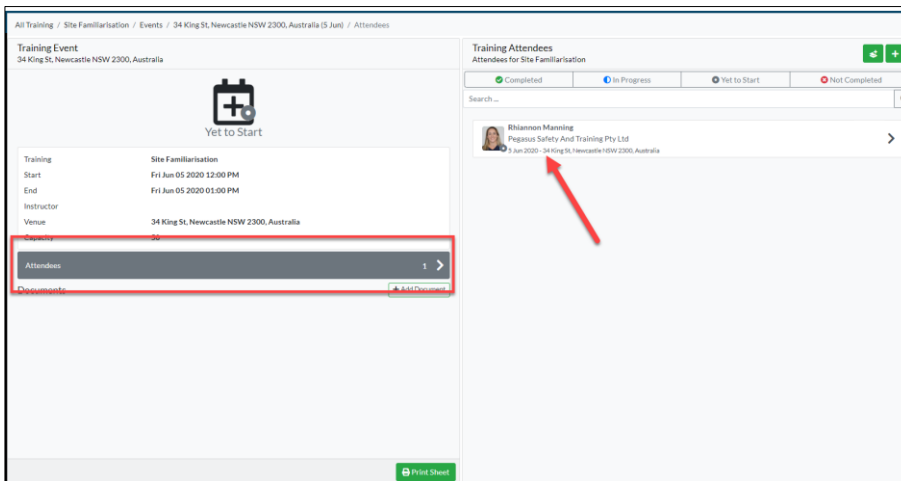
4. Click the remove attendee button and click yes
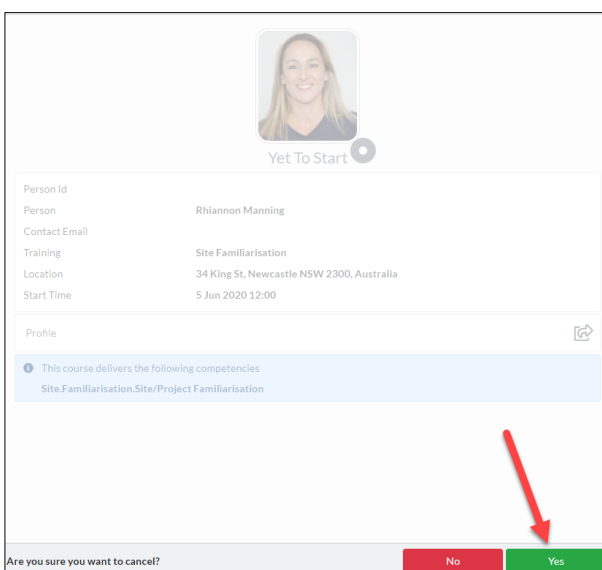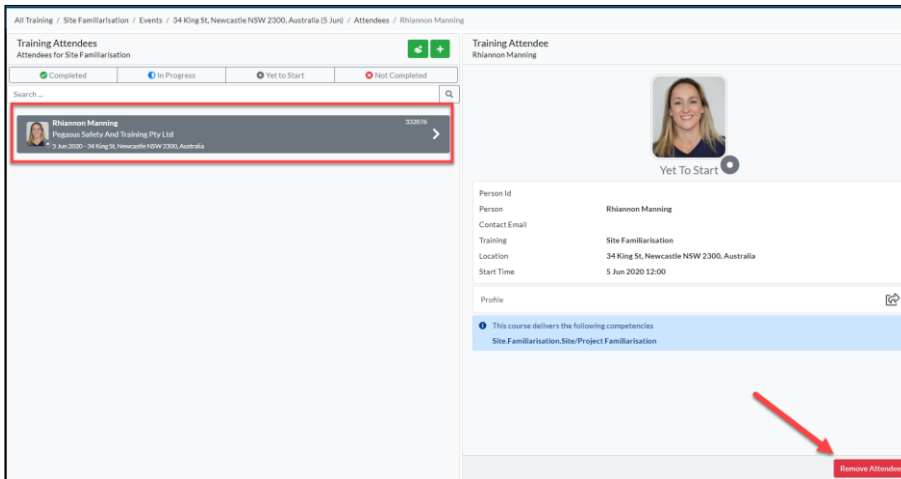
HOW TO ASSIGN A COURSE TO A LEARNER THROUGH THE LMS

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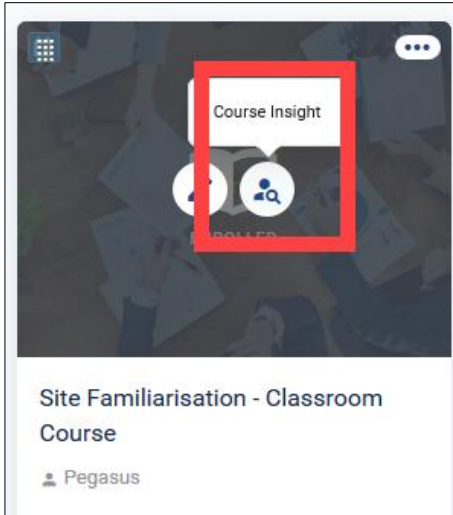
2. Click on 'Assign Course'
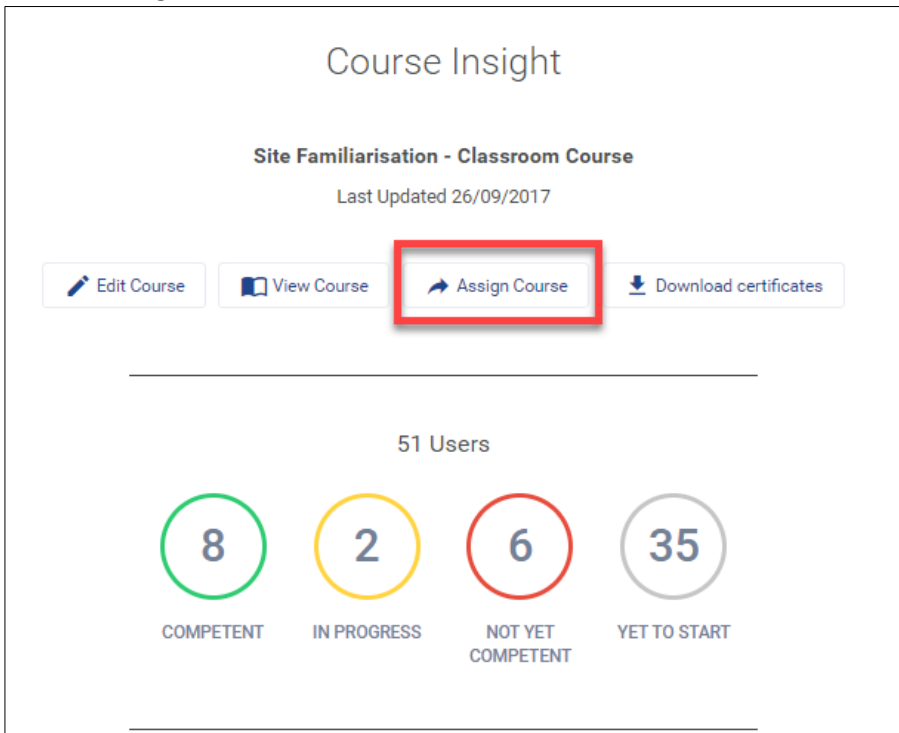
3. Add the learners email address and click add. You can repeat the process and add other leaners to the course. Once you have finished adding the leaners, you can then add a message if required. Then click 'Continue'.

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

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

5. Click attendees

6. Click the '+' to add the learner

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

8. Click on Save
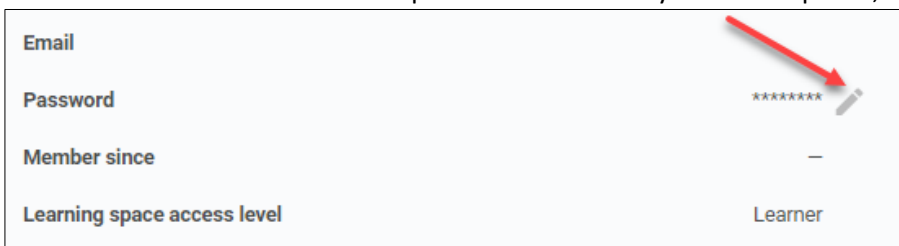
HOW TO RESET A LEARNERS LMS PASSWORD

1. Log into the LMS where the learner holds the booking
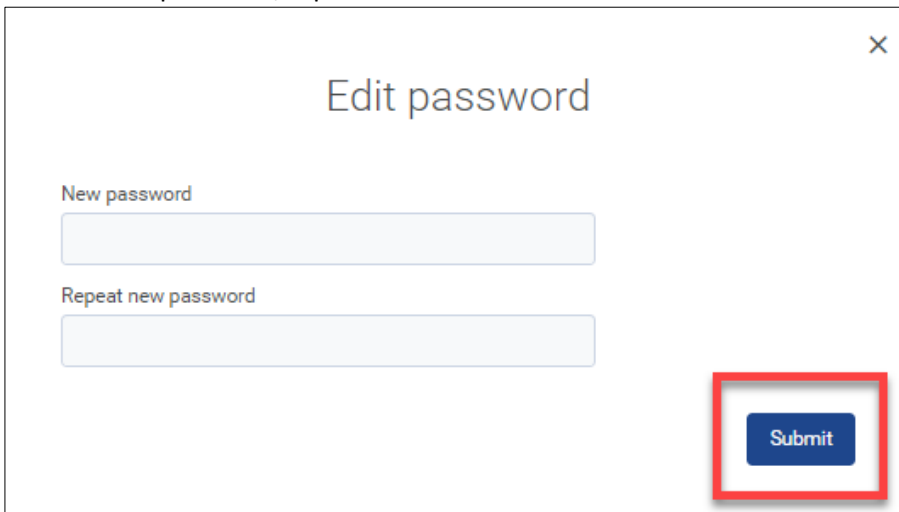
2. Click on the People tab
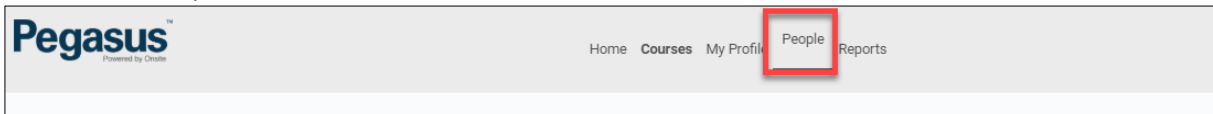
3. Search for the learner using the search bar and click on the learners name
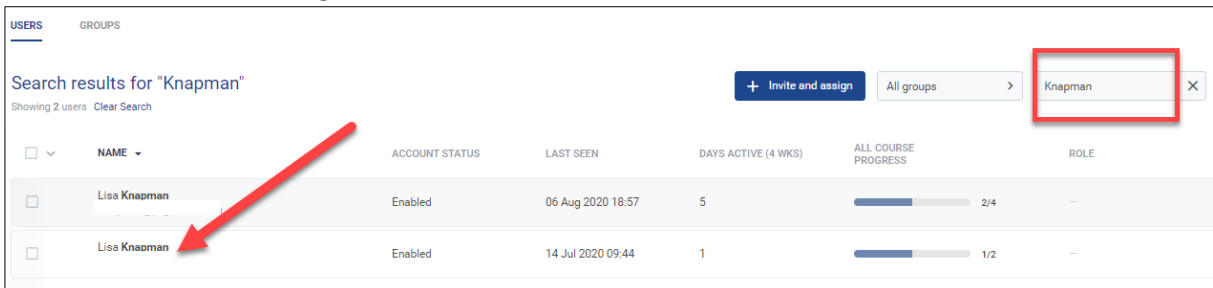
4. Hover over to the left of the word password and when you see the pencil, click the pencil



5. Add the new password, repeat and 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.
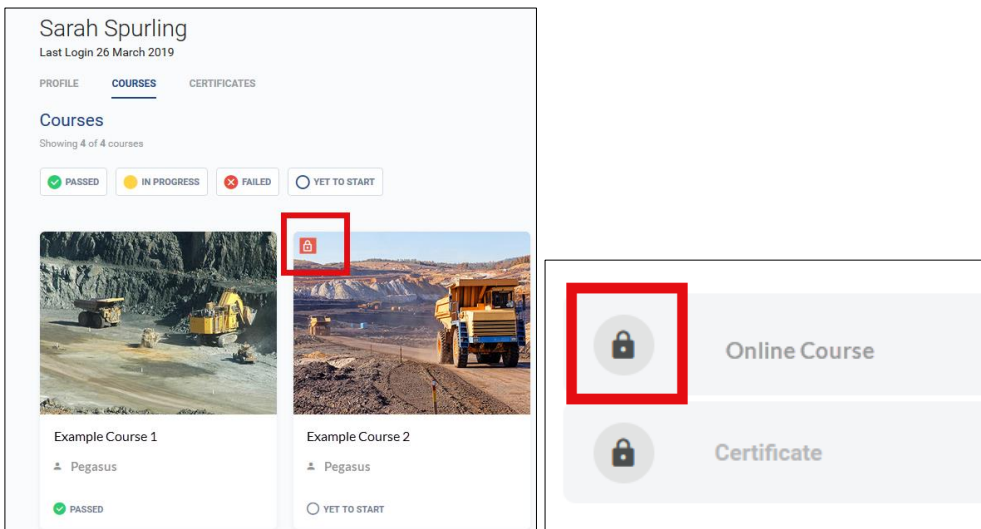
To do this:

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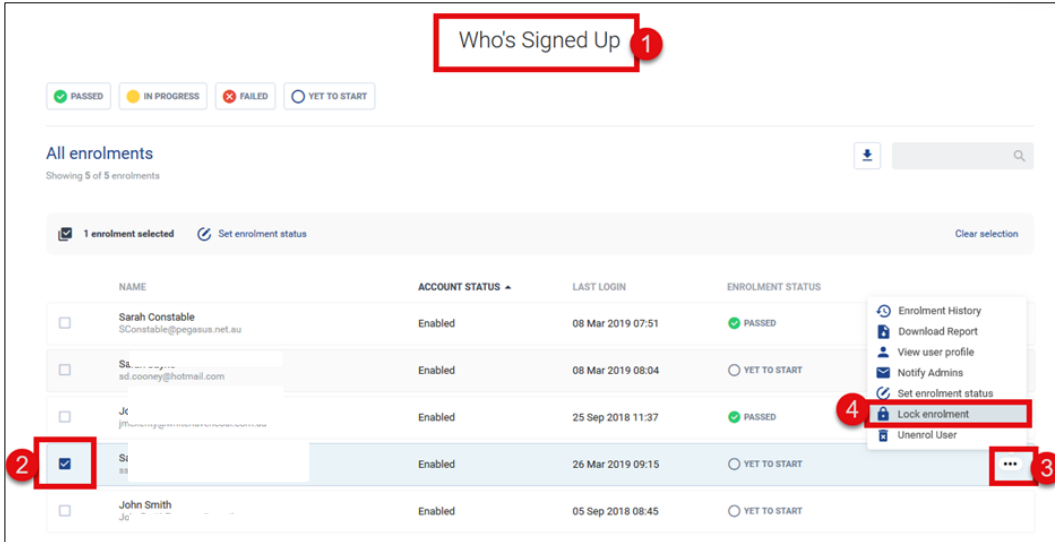
To unlock the learner, do the same as above but this time, select unlock.

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.
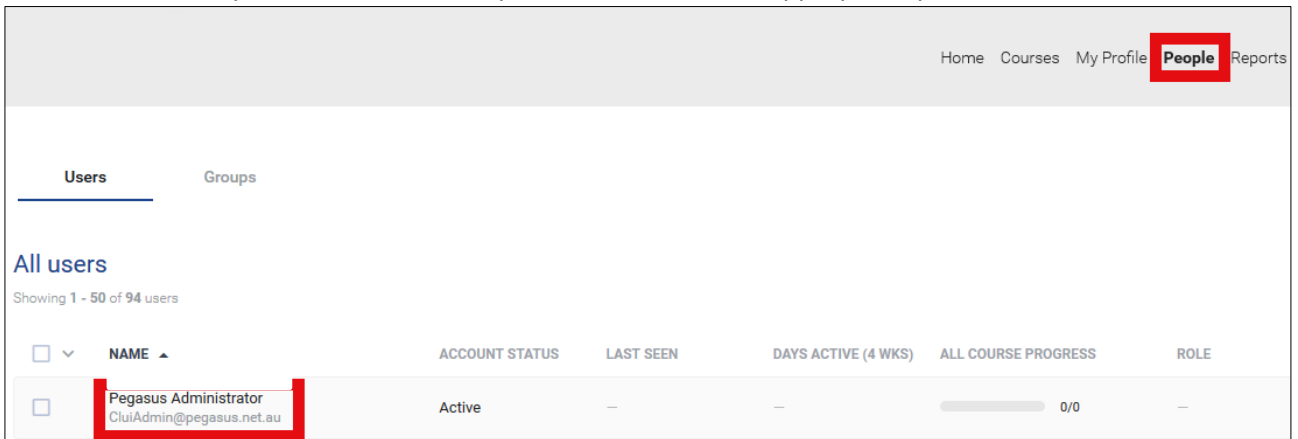
2. Then select 'Edit' next to the person's name and correct the name accordingly.
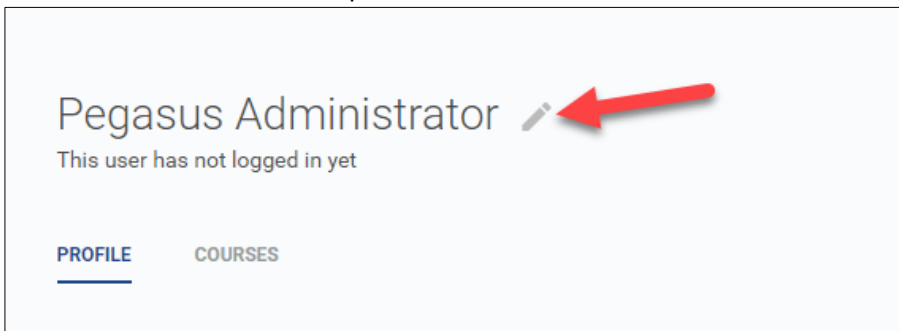
3. NOTE: Learners are not able to change their own name. Once you have actioned this, all the learner's certificates will update with the new spelling of their name.

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.
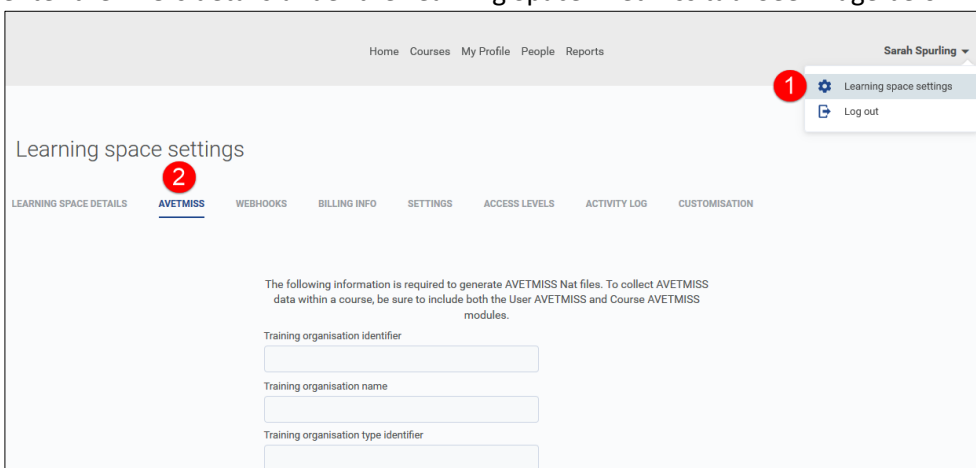
Once you have completed the above, you can then create a course and use the two Avetmiss modules. They are: User Avetmiss data and Course Avetmiss data and you will see these under 'Add Modules' within a course. Refer to the sections above on how to create either an online or classroom course.
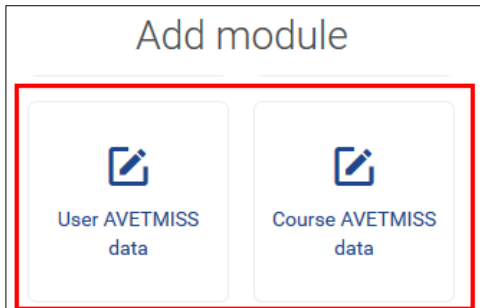
The User Avetmiss data is a form that the learner is required to complete. Please note that there is no verification via the LMS of the learner's USI number. This is the responsibility of the client to verify this.

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.

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 want to report on?

Course enrolments	User information	Form values	AVETMISS NAT files

Report name

Filters

Avetmiss

☐ Include disabled users

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.

➕ Add a schedule

Create report   Cancel