e-Learning:

Pathways Module

Practical Exercise

May 2021

Signify SOFTWARE

version 8

Contents

E-LEARNING

1. Login and LMS Portal Pages (Discussion only)

WHY: *As a group, discuss how to log into the system and how to use the LMS Portal page.*

- Discuss the Login Page as a group.
- Discuss the LMS Portal Page as a group. Focus on:
  - The Quick Start Menu
  - The Administration Menu, if applicable to the group
  - The LMS Portal section (search, dropdowns, courses, e-learning, PDP, quick links) of the screen.
- The Portal menu items:
  - My Details
  - My Employees
  - E-Learning Programmes
  - My Courses
  - Training History
  - Reports

2. Setting the Scene

- The Signify System and its suites: HR, LMS, Performance Management.
- The LMS and its components.
- What the Pathway module is used for.
- How it is different compared to the Event Management module.

3. Plan a Pathway Course Outline

- Using white A4 sheets, plan a general course outline.

4. Organising Training Content / Pathways via the Tree View

WHY: *Pathways are stored in a folder structure, similar to folders on a computer. The design of the structure is critical in order to allow the administrators to effectively manage the pathways and for the users to easily locate the desired content.*

WHERE: *From the System Portal page, click* ***System Administration*** *from the* ***Administration*** *menu and then locate* ***Modules | e-Learning | Learning Management | Manage Learning Pathway.***

- The tree/folder structure in this image is a good example of what an administrator may create.

Signify Training [Category] [Published] [Learning Store] [Edit] [Add Category] [Add Pathway] [Copy]
  Signify Software [Category] [Published] [Learning Store] [Edit] [Add Category] [Add Pathway] [Copy]
    Signify LMS Showcase Pathway [Pathway] [Published] [Edit] [Copy]

5. Accessing a Pathway Tree View

WHY: *Users will search for and locate pathways on the folder or tree structure that you are going to create and use to accommodate the pathways. How it is put together is therefore very important.*

WHERE: *From the System Portal page, click* ***System Administration*** *from the* ***Administration*** *menu and then locate* ***Modules | e-Learning | Learning Management | Manage Learning Pathway.***

- From the main landing page select **System Administration** from the **Administration** menu.
- **Select Modules | e-Learning | Learning Management | Manage Learning Pathway** to access the Manage Learning Pathway section.
- View the tree structure with all its nodes/branches.
- Expand a few individual branches on the tree structure by clicking the icons.

6. Search on the Tree Structure

- Note the other functionalities available on the Learning Pathway Screen.
- Click Refresh to update the pathway tree view.
- Use any of the search fields at the top of the page to filter your existing folders and pathways.
- Click Search **SEARCH** to display the pathway tree structure in a table format.

- Note the different fields used e.g. to indicate the presence of a target audience on a pathway, the audit trail dates etc.

7. Create a New Branch on the Tree Structure

WHY: *When adding a new pathway, it will sometimes be necessary to add more levels to the existing tree structure.*

WHERE: *From the System Portal page, click* ***System Administration*** *from the* ***Administration*** *menu and then locate* ***Modules | e-Learning | Learning Management | Manage Learning Pathway.***

- Determine where your new branch is to be created by clicking ON the branch/node to which it is to be added, e.g. click on **General Training Courses**.
- Once the correct position for the branch has been determined, click Add Main Category.
- Provide the information for the new branch/node as follows:

FIELD	CONTENT
PATHWAY TYPE	Ad hoc
ITEM LABEL	E.g. **"My Name" – Training Courses** (because you'd like to ID your branch later)
SHORT DESCRIPTION	Courses giving the learner access to a world of knowledge.
ITEM TYPE	Category
PUBLISHED STATUS	Not Active (meaning nobody can see it yet)
DEVELOPMENT STATUS	Under Construction (so that your colleagues know this is a work in progress)
ITEM ORDER	Order in which the category will be displayed.
PRIORITY	The priority of the category should there be any other category with the same item order.
SHOW AS SHORTCUT ON LMS PORTAL	When not selected, this item will only appear when searching, or when drilling down in categories where 'Show as shortcut on LMS portal' was selected.
PATHWAY IMAGE	Upload a professional image make the pathway more visual

- Click Save to save and create the new branch on the tree structure. If the branch is not immediately shown, click Refresh on the Pathway List Screen, so that it can be updated.
- Add more lower-level branches to your new level/branch if required by using the Add Main Category or [Add Category] buttons.
- Click on your branch and note which of the buttons are active; click on other branches and note how the buttons are activated depending on the position of your cursor.

8. Add a Pathway to Your New Branch on the Tree Structure

WHY: *A new branch/node has been added to your tree structure. Now it is time to add an e-learning pathway to your branch.*

WHERE: *From the System Portal page, click* ***System Administration*** *from the* ***Administration*** *menu and then locate* ***Modules | e-Learning | Learning Management | Manage Learning Pathway.*** *Locate your own branch on the tree view.*

- To determine the position of the new Pathway, click ON the node to which you want to add the pathway e.g. "*My Name – Training Courses*".
- To add a new pathway, click [Add Pathway] to display the **Pathway Node Detail** window.
- Provide the information for the new pathway as follows:

FIELD	CONTENT
USE AS TEMPLATE	Unchecked
SHOW STEP AS	Select either *Indicator* or *Tabs*
PATHWAY TYPE	Ad hoc
ITEM LABEL	E.g. **My Name – Excel Training** (because you'd like to ID your pathway later)
ITEM TYPE	Pathway
SHORT DESCRIPTION	E.g. Become a guru on MS Excel. (Description displayed on the LMS Portal)
DESCRIPTION TITLE	Description displayed on category/pathway
DESCRIPTION	Full description displayed on the LMS Portal
ITEM STATUS	Not Active (meaning nobody can see it yet)
DEVELOPMENT STATUS	Under Construction (so that your colleagues know this is a work in progress)
ITEM ORDER	Order in which the category will be displayed.
PRIORITY	The priority of the category should there be any other category with the same item order.
SHOW AS SHORTCUT ON LMS PORTAL	When not selected, this item will only appear when searching, or when drilling down in categories where 'Show as shortcut on LMS portal' was selected.

- Click the Save button. Note the following:
  - The Pathway Node Detail tab's information is saved.
  - The screen jumps to the pathway's **Preview** screen on the LMS Portal.

9. Edit your Pathway

WHY: *A pathway is initially created from the tree node structure, but once all of the details are completed, the Pathway steps are added from the LMS portal.*

WHERE: *From the* ***Tree Node Detail*** *page, click* ***System Administration*** *from the* ***Administration*** *menu and then locate* ***e-Learning | Manage Learning Pathways.*** *Locate and expand your own branch on the tree view and click on* ***EDIT*** *next to your Pathway name.*

- Click the Pathway Design button. Note the following:
  - The button will be greyed out until the pathway name is saved
  - If you click on it, you will be taken to the LMS portal where the Pathway Steps are added.
  - Click on ← Back to Pathway Admin to return to the tree view structure.

10. Understand the Pathway Screen Modes

WHY*: A pathway can be opened in one of three modes. Always check in which mode you are working. We will now review the different MODES a screen can be used in.*

WHERE: *From the System Portal page, click* ***System Administration*** *from the* ***Administration*** *menu and then locate* ***Modules | e-Learning | Learning Management | Manage Learning Pathway.*** *Locate and expand your own branch on the tree view and then click ON your new pathway node to open it in EDIT mode.*

- **Edit / Teacher Mode:** When in ***Edit mode***, the user will be able to ***Edit*** the pathway.
- **Learning Mode:** When in ***Learning Mode,*** the pathway will be displayed as the learner will see it.
- The Teacher, Facilitator or Learning Administrator can switch between Learning Mode *and* Edit Mode by selecting the applicable mode at the top right corner of the Pathway Section.

  Your Active mode will be highlighted in blue Edit Mode ▾ Learning Mode.
- Facilitators have a Learning Mode and a Teacher Mode.
  - Teacher mode allows facilitators to add resources/course material. They can only access the Pathway from the LMS portal.

11. Understand the Steps Available on a Pathway

WHY*: Different situations require different tools. Learn what to use when.*

WHERE: *From the System Portal page, click* ***System Administration*** *from the* ***Administration*** *menu and then locate* ***Modules | e-Learning | Learning Management | Manage Learning Pathway.*** *Locate and expand your* own branch / Pathway on the tree view and then Edit* next to the relevant Pathway. Once the pathway is open, select ***Pathway Design.***

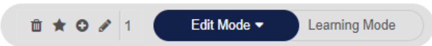
- When creating a Pathway for the first time, all the steps will be opened from a dropdown in the top righthand corner.

PATHWAY STEP	PURPOSE
Comment	A read-only message to the learner.
Acceptance	The learner has to tick a check box to indicate his acceptance of something e.g. that (s)he will abide by the terms and conditions.
Document	Provide a document which the learner can download from the pathway e.g. a manual.
Learning Guide	Store a document in the central document repository and allow learners to download it from the pathway.
Online Assessment	Let the learner do a test/assessment of what (s)he has learned. These are created and configured in Assessment Builder Module.
Certification Point	To tell a learner that by completing the pathway this far (s)he has reached a milestone or the end of the pathway. Can create a final learner record for the pathway if needed.
Class/Group	Select a specific target audience based on subgroups and link them to a facilitator (if added, this step will always default to the first step in the pathway structure).
Multi Item	Link multiple step requirements to a single Pathway Step.

12. Add the First Step to Your Pathway

WHY*: A pathway is open in EDIT mode and we are going to add steps to the pathway.*

WHERE: *From the System Portal page, click* ***System Administration*** *from the* ***Administration*** *menu and then locate* ***Modules | e-Learning | Learning Management | Manage Learning Pathway.*** *Locate and open your pathway by selecting Edit | Pathway Design.*

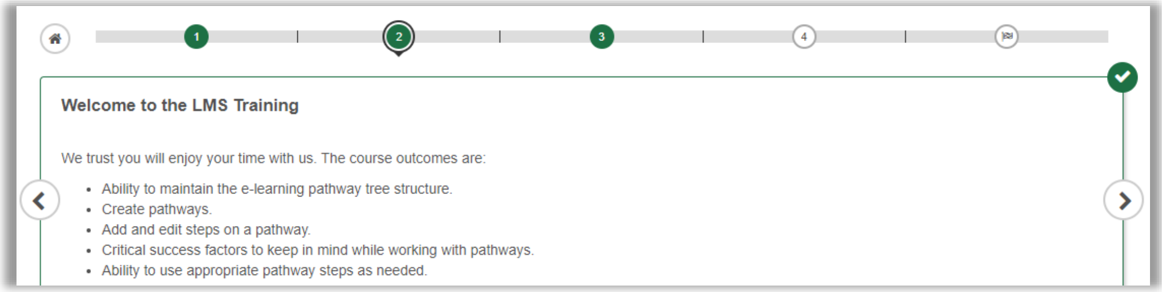
- From the admin buttons 

, click on 
- Locate and click to add the **COMMENT** item.
- A dialog box is opened.
- Provide your information by using the following table and image as a guideline. The yellow bubbles indicate the fieldname and eventual position of the fields in the Comment item's dialog box.

FIELD	CONTENT
CUSTOM MAIN HEADER	WELCOME (Uppercase!)
REFERENCE DESCRIPTION	Welcome to the LMS Training
DESCRIPTION	We trust you will enjoy your time with us. The course outcomes are:

	* Ability to maintain the e-learning pathway tree structure. * Create pathways. * Add and edit steps on a pathway. * Critical success factors to keep in mind while working with pathways. * Ability to use appropriate pathway steps as needed.

- After completing all the relevant fields click Save to create the comment step and display it on the pathway. (Remember to close the screen when done.)



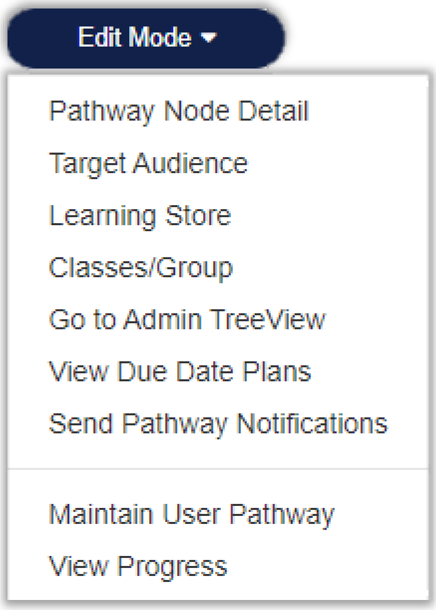
13. Understand the Pathway Functionalities When in Edit Mode

WHY: *When a pathway is opened in EDIT mode, certain functionalities and tools are available.* ***WHERE:*** *From the System Portal page, click* ***System Administration*** *from the* ***Administration*** *menu and then locate* ***Modules | e-Learning | Learning Management | Manage Learning Pathway.*** *Locate and open your pathway by selecting Edit | Pathway Design.*

Don't do any of the following, just read and make sure you locate each button, icon and section. Use the just-added WELCOME step on your pathway as reference.

Edit Options: The options are the heart of pathway design and is used to control the type of step added to the pathway as well as their position on the pathway and the prerequisites that are linked per step

- ← → 2 will move the existing step's order.
- will edit the current step.
- will delete the current step.

- is used to specify prerequisites for the step.
- is used to insert a new step in the position next to the current step. The Current step will keep its position and the subsequent steps will be moved up one position to make space for the new position.
- 

Use the dropdown to find quick links to Pathway Administration functions such as Target Audience or maintain user Pathway.
- For the next few steps, use the **WELCOME** step that you have just added to your pathway. You are welcome to <u>attempt or investigate</u> the following actions but DON'T delete your just-added step!
- Use the navigation bar to skip steps and move between pathways.

- Use the button to navigate to the Summary Page. From this window, click on any Pathway steps to go there.
- Use the and buttons on the side of the pathway step to move forward and backward in your pathway.

14. Edit and Format Your First Pathway Step

***WHY**: You have added your first Comment step to your pathway. Now let's edit and format the step to enhance its appearance.*

WHERE: *From the System Portal page, click* ***System Administration*** *from the* ***Administration*** *menu and then locate* ***Modules | e-Learning | Learning Management | Manage Learning Pathway.*** *Locate and open your pathway by selecting Edit | Pathway Design.*

- Locate your **Comment** step and click its icon.
- Use the text editor to format the step's **Description** field. (Change the font; add colour etc.)
- Click Save to submit your changes.

15. Add additional resources to your comment step

WHY: *Additional resources are added by facilitators or administrators and can be specified per class/group.*
WHERE: *From* ***Pathway Design*** when in ***Edit Mode*** *or in* ***Teacher Mode*** and when on a ***specific step.***

- Use the + Add Additional Resources button to add learning material related to the Pathway or the specific step.
- The **Additional Resources** sub window will open. Click on + then on Document. Use the dialog box to load the document, provide a title, and to specify which class/groups may see it. If a Publish date is specified, then the document will not be made available until that date is reached.

16. View Your Pathway in User mode

WHY: *You have added your first Comment step to your pathway. How will it look when viewed by a user?*
WHERE: *From the System Portal page, click* ***System Administration*** *from the* ***Administration*** *menu and then locate* ***Modules | e-Learning | Learning Management | Manage Learning Pathway.*** *Locate and open your pathway by selecting Edit | Pathway Design.*

- While in **EDIT** mode, at the top left corner of the PATHWAY section, locate and click the Learning Mode button to switch to **View/User** mode.
- Once done, click Edit Mode to return to **EDIT** mode.

17. Add a second, more involved step to your Pathway

WHY: *A pathway is open in EDIT mode and we have added the first, very basic, step to the pathway. Now let's add a slightly more advanced step.*

__WHERE:__ From the System Portal page, click __System Administration__ from the __Administration__ menu and then locate __Modules | e-Learning | Learning Management | Manage Learning Pathway.__ Locate and open your pathway by selecting Edit | Pathway Design.

- Click on and locate the **USER MESSAGE** pathway item. (This kind of step is usually used when e.g. asking learners what their expectations are about the course.)
- A dialog box is opened, requiring certain information from the administrator.
- For the **User Message** item selected above, provide the required information as shown below.

FIELD	CONTENT
CUSTOM MAIN HEADER	TELL US ABOUT YOUR COURSE EXPECTATIONS (Uppercase + Verb!)
REFERENCE DESCRIPTION	Your expectations?
DESCRIPTION	In a sentence or two, tell us about your expectations for the course. Consider things like career progress, personal enrichment etc.

- After completing all the relevant fields, click Save to create the user message step and display it on the pathway.
- Change to Learning Mode mode to see how the step is displayed.
- Switch back to Edit Mode mode.

18. Add a Class/Group Step

__WHY__: A Class/Group step will provide everyone with more information of who will be joining them.
__WHERE:__ From the System Portal page, click __System Administration__ from the __Administration__ menu and then locate __Modules | e-Learning | Learning Management | Manage Learning Pathway.__ Locate and open your pathway by selecting Edit | Pathway Design.

- From the admin buttons 1 Edit Mode Learning Mode, click on
- Locate and click to add the **Class/Group** item.
- A dialog box is opened.
- Provide your information by using the following table and image as a guideline. The yellow bubbles indicate the fieldname and eventual position of the fields in the Comment item's dialog box.

FIELD	CONTENT
CUSTOM MAIN HEADER	MEET YOUR CLASS (Uppercase + Verb!)

REFERENCE DESCRIPTION	Your Class
DESCRIPTION	*Can be left blank.*

- After completing all the relevant fields click Save to create the comment step and display it on the pathway. (Remember to close the screen when done.)
- Change to Learning Mode mode to see how the step is displayed.
- Switch back to Edit Mode mode.

19. Add a Document Step to Your Pathway

***WHERE:** From the System Portal page, click **System Administration** from the **Administration** menu and then locate **Modules | e-Learning | Learning Management | Manage Learning Pathway.** Locate and open your pathway by selecting Edit | Pathway Design.*

- Click on ⚙ and locate **DOCUMENT** pathway item. (This kind of step is used when a learner has to download course material or even terms and conditions.)
- A dialog box is opened, requiring certain information from the administrator.
- For the **Document** item selected above, provide the required information as shown below.

FIELD	CONTENT
CUSTOM MAIN HEADER	DOWNLOAD AND STUDY THE COURSE MATERIAL (Uppercase + Verb!)
FILE NAME	Click BROWSE to select any smallish file from your PC
REFERENCE DESCRIPTION	Download your course material
DESCRIPTION	Click the hyperlink to download a copy of your course material. The file is in PDF format and you need a PDF reader installed on your computer. If you cannot open the document, click "http://get.adobe.com/reader/" to download and install a free copy of Adobe Reader. You will get the option of either opening and reading the document directly or saving it to your desktop, just follow the on-screen instructions.

- After completing all the relevant fields, click Save to create the document step and display it on the pathway.
- Change to Learning Mode mode to see how the step is displayed.
- Switch back to Edit Mode mode.

20. Add an Acceptance Step to Your Pathway

WHERE: *From the System Portal page, click* ***System Administration*** *from the* ***Administration*** *menu and then locate* ***Modules | e-Learning | Learning Management | Manage Learning Pathway.*** *Locate and open your pathway by selecting Edit | Pathway Design.*

- Click on ⚙ and locate the **ACCEPTANCE** pathway item. (This kind of step is used when a learner has to acknowledge something e.g. the terms and conditions or even that (s)he has read a document.)
- A dialog box is opened, requiring certain information from the administrator.
- For the **Acceptance** item selected above, provide the required information as shown below.

FIELD	CONTENT
CUSTOM MAIN HEADER	INDICATE THAT YOU HAVE STUDIED THE COURSE MATERIAL (Uppercase + Verb!)
REFERENCE DESCRIPTION	Have you read the material?
ACCEPTANCE TITLE =	I have studied the course material for the Signify pathway course
DESCRIPTION	In order to continue with the course, you have to indicate that you managed to download and study the course material. Indicate this by ticking the text box below.
LOG TO LEARNER RECORD	√
TRAINING INTERVENTION – SPECIFY CUSTOM	I have studied the course material for the Signify pathway course

- After completing all the relevant fields, click Save to create the acceptance step and display it on the pathway.
- Change to Learning Mode mode to see how the step is displayed.
- Switch back to Edit Mode mode.

21. Add a Certification Point Step to Your Pathway

WHERE: *From the System Portal page, click* ***System Administration*** *from the* ***Administration*** *menu and then locate* ***Modules | e-Learning | Learning Management | Manage Learning Pathway.*** *Locate and open your pathway by selecting Edit | Pathway Design.*

- Click on ⚙ and locate the **CERTIFICATION POINT** pathway item. (This kind of step is used to determine if a learner has completed all relevant steps and then to issue a final training record.)

- Provide the required information as shown below.

FIELD	CONTENT
CUSTOM MAIN HEADER	COMPLETION QUALIFICATION (Uppercase!)
CERTIFICATION POINT	Advanced Excel
DESCRIPTION	This certification is dependent on your having completed all the requirements for the qualification. If you met all the prerequisites the LMS will issue the qualification and it will be visible on your training records.
LOG TO LEARNER RECORD	√
CREATE NEW TRAINING INTERVENTION	Advanced Excel

- After completing all the relevant fields, click Save to create the certification point step and display it on the pathway.
- Change to Learning Mode mode to see how the step is displayed.
- Switch back to Edit Mode mode.

22. Add a Multi-Item Step to Your Pathway

***WHERE:** From the System Portal page, click **System Administration** from the **Administration** menu and then locate **Modules | e-Learning | Learning Management | Manage Learning Pathway.** Locate and open your pathway by selecting Edit | Pathway Design.*

- Click on ⚬ and locate **MULTI-ITEM** pathway item. (This kind of step is used when there are multiple tasks that must be completed in one step before a learner can continue to the next step.)
- A dialog box is opened, requiring the step information from the administrator.
- After completing all the relevant fields, click Save to create the step and display it on the pathway.
- Click on + New Item and select any of the Pathway Step Items displayed in the drop-down list.
- In the Dialog Box, complete all of the required fields for the selected item.
- Click on Save to add the item to the pathway step.
- Repeat the above steps as needed.

- Change to Learning Mode mode to see how the step is displayed.
- Switch back to Edit Mode mode.

23. Add More Steps to Your Pathway

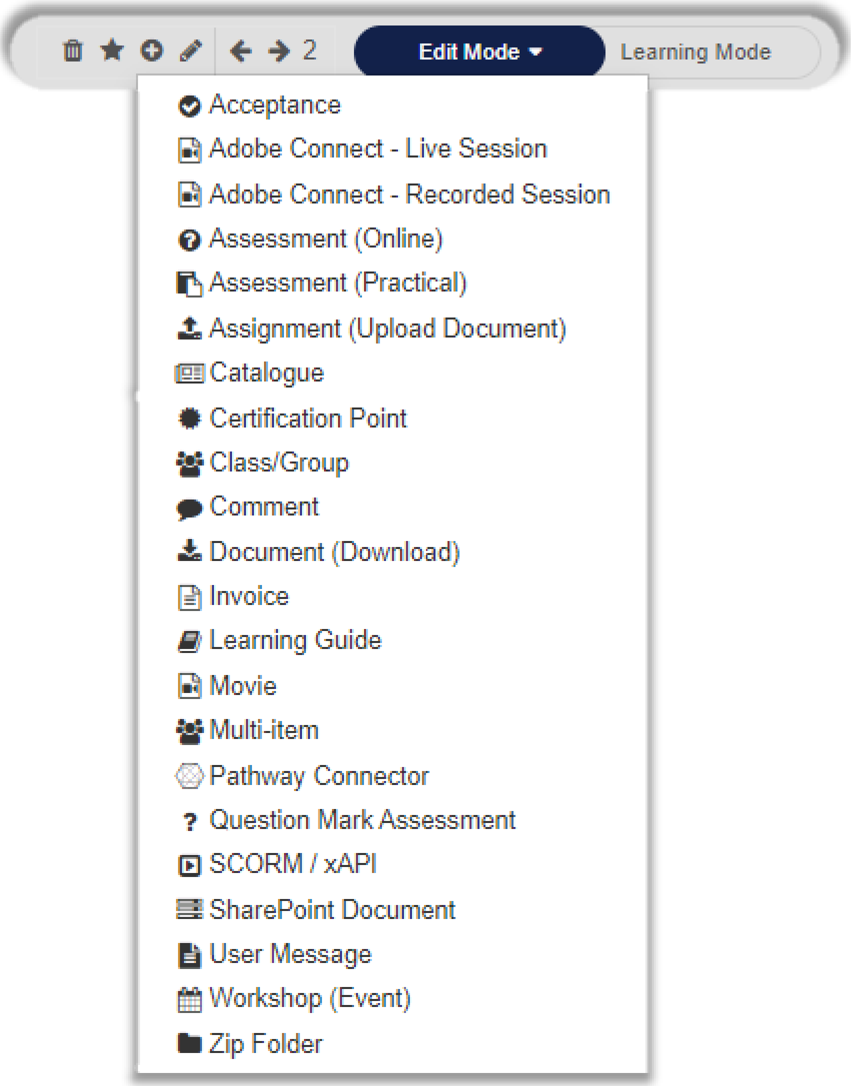
WHY: *Your first pathway steps have been added. Let's add a few more if required.*

WHERE: *From the System Portal page, click* ***System Administration*** *from the* ***Administration*** *menu and then locate* ***Modules | e-Learning | Learning Management | Manage Learning Pathway.*** *Locate and open your pathway by selecting Edit | Pathway Design.*

A pathway guides a learner through certain steps in order to achieve some desired outcome which could be a certification, accreditation, update on a policy, and acknowledgement of something. To assist you in designing a sensible pathway, consider the examples below and then construct your own.

- Acquiring your FAIS accreditation. *(With possible steps: Intro, Download the Terms and Conditions, Accept the Terms and Conditions, Pay an Invoice, submit your Expectations, Download Training Material, Do an Assessment, Book your Final Exam)*
- Get an update on a policy. *(With possible steps: Intro, Download and Save the New Policy, Study the Policy, Accept the New Policy)*
- Teach a learner how to play poker. *(With possible steps: Intro, Download the Terms and Conditions, Accept the Terms and Conditions, Download Study Material, ask a Question, Attend a Workshop)*

- On your pathway, use the **Add Item Option** and add one (or more) of each of the following steps (highlighted and explained below). You can use them in any order:



PATHWAY STEP	PURPOSE
Acceptance	The learner has to tick a check box to indicate his acceptance of something e.g. that (s)he will abide by the terms and conditions.
Adobe Connect – Live session	If you or your company have an Adobe Connect Account, it can be integrated with onto a Pathway Step. Learners then access the step through their pathway, and there is no need for email notifications.
Adobe Connect – Recorded session	If you or your company have an Adobe Connect Account, it can be integrated with onto a Pathway Step. Learners then access the step through their pathway, and there is no need for email notifications.
Assessment (Online)	Let the learner do a test/assessment of what (s)he has learned. (Only if an assessment is available from the assessment library.)
Assessment (Practical)	If the results from a Practical Assessment is recorded for a learner, they can view it here. There is no other interaction.

Assignment (Upload Document)	The learner has to upload document(s) as proof of the work done. This works in conjunction with the Assignment Management Control Panel.
Catalogue	Integrates with the Signify Catalogue Module and provides learners with access to the catalogue via a Pathway Step.
Certification Point	To tell a learner that by completing the pathway this far (s)he has reached a milestone or the end of the pathway.
Class/Group	Shows the individuals who should be completing the Pathway and their current progress.
Comment	A read-only message to the learner.
Document	Provide a document which the learner can download from the pathway e.g. a manual.
Invoice	The learner has to type in his details for the system to generate an invoice. Usually, the invoice has to be paid before the learner can continue with the course.
Learning Guide	Link documents that are stored on the Documents Learning Library to a Pathway Step. This allows for versioning and when the same document is linked to multiple steps, only one update is needed.
Movie	Play a video file in the Pathway Step.
Multi Item	Use this step to link other steps as a single step requirement.
Pathway Connector	Provide learners with access to other pathways from the current pathway using the rules configured in Training Interventions
Question Mark Assessment	Integrates with Question Mark to provide the learner with assessment that is not stored on the Signify System.
SCORM/xAPI	Link to an existing SCORM/xAPI file that is stored in the Learning Content Library
SharePoint Document	If you or your company makes use of SharePoint, then you can provide the learner with access to certain documents directly from the Pathway
User Message	Requests information FROM a learner. Typical uses include asking a learner's current job title, or his goals with the training etc.
Training Workshop	This step allows the user to book on a course published in the Event Management module.
Zip Folder	Upload a Zip Folder for the system to open and present to the learner. This is not a Movie Step or a SCORM/xAPI step and the folder must have a STARTUP.HTML file in it.

- Remember to often switch to Learning Mode mode to see how your pathway will display to a user.
- On many steps you will note two fields. Here is what they are used for:

Log to Learner Record	*When a user completes a step (whether by accepting it, downloading a document, completing an assessment etc., the result is permanently written to the user's Learner Records)* *When this option is activated, you will need to indicate WHAT is to be recorded in the learner records, e.g. a sentence or just the heading of the step.*
Lock Pathway Step	*When you need to temporarily prevent users from working on a step (e.g. because you need to update an outdated downloadable document), lock the step, fix what needs to be fixed and then unlock the step again.*

***

Discuss the purpose and use of PREREQUISITES on a step as a class

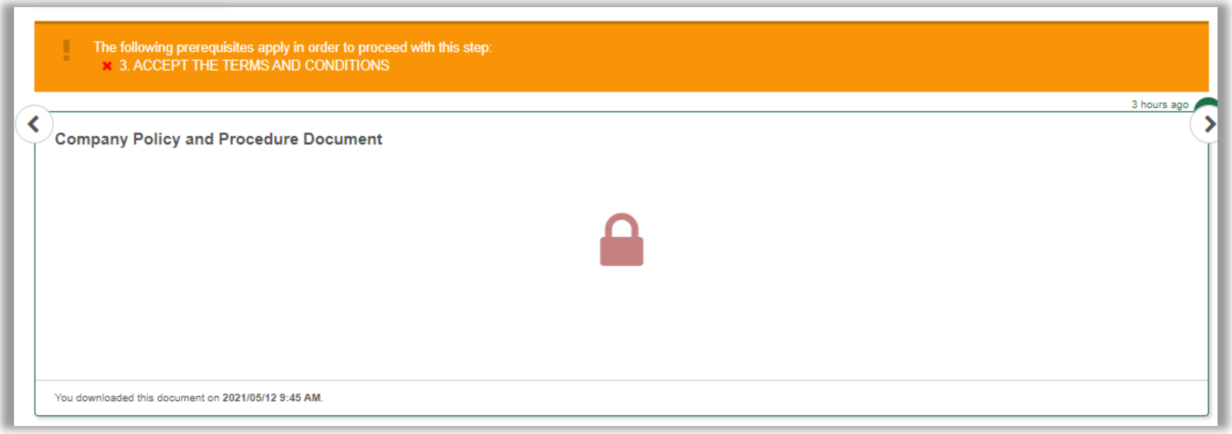
***

24. Add Prerequisites to a Step

WHY*: In a pathway, some steps can be made to rely on the completion of a prior step e.g. you can only do an assessment once you have downloaded the course material. This is called a step prerequisite.*

WHERE: *From the System Portal page, click* ***System Administration*** *from the* ***Administration*** *menu and then locate* ***Modules | e-Learning | Learning Management | Manage Learning Pathway.*** *Locate and open your pathway by selecting Edit | Pathway Design.*

- We assume you have added a few of the steps in the preceding section.
- Locate one of the steps added last to your pathway and click the ★ icon in the step.
- The **Prerequisite List** opens where a list of prerequisites, available for this step, is shown.
- On the **Prerequisite list** page click Add to open the **Prerequisite Detail** page.
    - From the **Pathway Item** dropdown, select the step that is to become a prerequisite for your current step. (E.g. Download a Document)
    - From the **Status** field, select the desired results or outputs for the **Pathway Item** that was selected. (E.g. Downloaded). The learner will not have access to the current step until the prerequisite step status is the same as the one specified.
- After making the selection, click Save.
- Return to the pathway and check the step which now contains the prerequisite.



- If another prerequisite must be added to the step, click * again to display the **Prerequisite List** page.
- Change to Learning Mode mode to see how the step is displayed.
- Switch back to Edit Mode mode.

25. Specify a Target Audience for a Pathway (Discussion Only)

WHY: *Some pathways are created for selected employees (called a target audience) only. Even though the pathway is to be published, only these employees should see the pathway when advertised. Although a target audience can be specified in 3 ways, we will only practise adding specific employees to the target audience.*

WHERE: *From the System Portal page, click* ***System Administration*** *from the* ***Administration*** *menu and then locate* ***Modules | e-Learning | Learning Management | Manage Learning Pathway.*** *Locate and expand your own branch on the tree view and then click on EDIT next to your pathway name to open it. Click the* ***Target Audience*** *tab.*

- To modify the target audience of a pathway, click the **Target Audience** tab at the top of your pathway.
- To indicate that the target audience is to be applied based on individual employee numbers, select the **Employee** radio button.
- To select the employees that should be able to access the pathway, click Add to display the **Employee Search** screen.
- Search for or locate the applicable employee(s) and tick their checkboxes.
- Click Select to transfer them to the target audience screen.
- **NB:** Click Refresh Target Audience to apply the target audience to the pathway. (if this button is present)
- OPTIONAL: Since sensitive information is sometimes protected in this way, it is advisable to always log into the system as another employee and to verify that the pathway is not visible to the general public.

26. Remove a Target Audience from a Pathway (Discussion Only)

WHY: *A pathway's target audience can be removed but there is a specific way in which to do it.*

WHERE: *From the System Portal page, click* ***System Administration*** *from the* ***Administration*** *menu and then locate* ***Modules | e-Learning | Learning Management | Manage Learning Pathway.*** *Locate and expand your own branch on the tree view and then click on EDIT next to your pathway name to open it. Click the* ***Target Audience*** *tab.*

- To modify the target audience of a pathway, click the **Target Audience** tab at the top of your pathway screen.
- When the target audience is to be removed, delete the selected employee(s) one by one or click Clear all Target Audiences to remove all employees at once.
- **NB:** Click Refresh Target Audience to ensure that the target audience is adjusted/removed (if this button is present).
- OPTIONAL: Since sensitive information is sometimes protected in this way, it is advisable to always log into the system as another employee and to verify that the pathway is not visible to the general public.

27. Publish Your Pathway

WHY*: Once created and well finished off, your pathway is ready to be published to the learning portal.*

WHERE: *From the System Portal page, click* ***System Administration*** *from the* ***Administration*** *menu and then locate* ***Modules | e-Learning | Learning Management | Manage Learning Pathway.*** *Locate and expand your own branch on the tree view and then click on EDIT next to your pathway name to open it. Click the* ***Target Audience*** *tab.*

- From the tree structure, open your own pathway.
- Click on its **Pathway Node Detail** tab.
- Locate the **Item Status** field and set it to
  - **Publish to Division (if it should be visible to only your operation),** or
  - **Publish to Group (if it should be visible to all the operations).**
- Locate the **Show on Portal** field and ensure it is ticked.
- To check whether your pathway was really published, go back to the main start-up/portal page and locate your pathway from there.
- Open any of your colleagues' pathways if you can see them.

28. Review Your Pathway

***WHY**: A pathway is normally published to an audience, whether a specific audience or even company-wide. A highly recommended practice is to review the entire pathway (or have it reviewed) by using the following checklist BEFORE THE PATHWAY IS PUBLISHED.*

***WHERE:** From the System Portal page, click **System Administration** from the **Administration** menu and then locate **Modules | e-Learning | Learning Management | Manage Learning Pathway.** Locate and expand your own branch on the tree view and then click ON your new pathway to open it in EDIT mode.*

29. Monitor Learners' Progress on a Pathway

***WHY**: Since learners are not booked on a pathway, you have to physically check who has viewed or is busy on a pathway.*

***IF YOU ARE LOST:** From the System Portal page, click **System Administration** from the **Administration** menu and then locate **Modules** | **e-Learning** | **Learning Management** | **Maintain Learning Pathway | Edit Pathway | Pathway Design | Edit Mode Dropdown List | View Progress**.*

- If you are lost, from the System Portal page, click **System Administration** from the **Administration** menu and then locate **Modules | e-Learning | Learning Management | Maintain Learning Pathway.**
- Locate and open your pathway. Click on Pathway Design | Edit Mode Dropdown List | View Progress.
- When selecting the **View Progress** button, the administrator can adjust the search dates if needed and click **Search** to display a list of all learners on your pathway with their progress.

30. Change a User's Results for a Step on a Pathway

***WHY**: It is sometimes necessary to "edit" the result of a user's pathway step e.g. when a user has exhausted his allowed number of attempts on an assessment and has asked for yet another retry attempt.*

***WHERE:** From the System Portal page, click **System Administration** from the **Administration** menu and then locate **Modules** | **e-Learning** | **Learning Management** | **Maintain Learning Pathway | Edit Pathway | Pathway Design | Edit Mode Dropdown List | Maintain User Pathway**.*

- From the System Portal page, click **System Administration** from the **Administration** menu and then locate **Modules | e-Learning | Learning Management | Maintain Learning Pathway | Edit Pathway | Pathway Design | Edit Mode Dropdown List | Maintain User Pathway**

- A list of employees is shown.
- Search for the relevant employee (use yourself) and click the employee's record to display the **Pathway List** page. This page contains a list of all the pathways the employee is currently busy with.
- Locate and click the record of the pathway that you would like to administrate.
- The **Pathway Item List** page is displayed. This page contains a list of the steps making up the pathway you had selected.
- Select the step in the pathway which you would like to query or change.
- The **Pathway Item Detail** screen is displayed. Note the screen layout and available functionalities are dependent on the type of step selected. Below are a few common characteristics.
  - The step's resultant learner record can be removed. Ensure that the tick box for the field shown below is selected.

    ☐ Remove this item from the learner record on Save or Rollback

  - The entire step can be reset to its original state by clicking Rollback.

31. Load a Training Intervention into the Library (Discussion Only)

WHY: *Many steps in a pathway allow the administrator log that step to a learner's training records. Occasionally the administrator has to either provide the title of the learner record or select it from the Training Intervention library. This section demonstrates how to do it.*

WHERE: *From the System Portal page, click **System Administration** from the **Administration** menu and then locate **System Administration | Database | Training Interventions**.*

- From the System Portal page, click **System Administration** from the **Administration** menu and then locate **System Administration | Database | Training Interventions**.
- After opening the library of existing training interventions, click **ADD** to add a new intervention. Note the following about this critically important screen:
  - The training interventions master data section contains a library of courses that can be used in events and pathway steps. As such the information required seems relatively simple and few fields are mandatory.
  - When anticipating generating WSP reports, note that you'd have to provide information in more fields.

- Some reports will only display information on a specific course if there is an intervention loaded for that course.

- On the training intervention screen itself, note the following about the fields:
  - The Training Intervention Name field is mandatory.
  - Use the Type field to classify the training intervention e.g. will it be used as an assessment etc?
  - Indicate if the learner can print a certificate for this intervention from his own Training History records.

32. Copying a Pathway

WHY: *Copying a pathway is an efficient way of re-using work that was done previously. Just make sure how to use the COPY function.*

WHERE: *From the System Portal page, click* ***System Administration*** *from the* ***Administration*** *menu and then locate* ***Modules | e-Learning | Learning Management | Manage Learning Pathway.*** *Locate and expand your own branch on the tree view and locate your pathway.*

- Locate the pathway you'd like to copy.
- Locate and click the copy hyperlink.

  Signify LMS Showcase Pathway [Pathway] [Published] [Edit] [Copy]

- Type a part of the destination folder's name or click Search to see the entire pathway folder structure.
- Select the destination folder and click Copy. Click OK to acknowledge the source pathway and the destination folder.
- After copying the pathway, locate it on the tree structure and note the following:
  - The pathway structure (headings, descriptions etc.) were copied, but not any referenced material, i.e.:
    1. i. Assessments are delinked on assessment steps and have to be re-linked to the correct assessment.
    2. ii. Documents are dropped on document steps and have to be re-linked.
    3. iii. SCORM and ZIP folders are dropped from their respective steps and have to be re-linked.
    4. iv. All steps where learner records have been logged are cleared and the correct interventions need to be provided.

- Locate and open your copied pathway and check the copied steps. Open e.g. an acceptance/ZIP/document step and verify that the referenced material and linked training interventions have been removed and need to be re-linked.

33. Further Actions on a Pathway

WHY: *The following actions are not normally discussed in class. If time permits feel free to review them on your own.*

WHERE: *From the System Portal page, click* ***System Administration*** *from the* ***Administration*** *menu and then locate* ***Modules*** *|* ***e-Learning*** *|* ***Learning Management*** *|* ***Manage Learning Pathways****.*

- Delete an entire pathway.
- Edit a pathway's name.
- Link an existing pathway in one branch/node to another branch/node.
- Remove the **Navigation** and **Description** sections on a pathway.
- View the different pathway reports available under **Modules | e-Learning | Learning Management | Reports**.
- Discuss the working of SCORM files and ZIP folders.

34. Upload a SCORM or xAPI File

WHY: *These file types are used to present learning content in a more interactive manner and also links with system reports that are unique to SCORM or xAPI*

WHERE: *From the System Portal page, click* ***System Administration*** *from the* ***Administration*** *menu and then locate* ***Modules*** *|* ***e-Learning*** *|* ***Learning Management*** *|* ***Learning Content Library***

1. Click on **+ Add Content** to open a modal.
2. Provide the required information as shown below.

FIELD	CONTENT
NAME	Description of Content
Choose File	*Use to find and upload SCORM/xAPI Package.*
Content Server	*Ensure RusticiEngine is selected*
Log to Learner Record	A series of tasks will be given to you. You are required to complete each of them.
Training Intervention	Select from Library
Has Assessment	Select if applicable
Allow Redo after completion	Select if required

Max Attempts	Indicate if applicable
Keep Score	Select relevant option
Is Active	Check when Library item may be used in Pathway.

35. Upload a Learning Guide

***WHY**: These file types are used to present learning content in a more interactive manner and also links with system reports that are unique to SCORM or xAPI*

WHERE:** From the System Portal page, click **System Administration** from the **Administration** menu and then locate **Modules** | **e-Learning** | **Learning Management** | **Learning Guides

1. Click on a Node and then on Add Category .
2. Complete the details, provide a *Category Name* and *Description*
3. Publish the Category to your *current schema* or to *all schema's.*
4. Select Active
5. Click on the new Category and then on Add Document
6. Click on Choose File and upload the file (M/S Word, M/S PowerPoint, M/S Excel, Apple Pages, Apple Numbers, Apple Keynote, OpenOffice Writer, OpenOffice Calc, OpenOffice Impress)
7. Provide *Reference Number, Title* and *Version.*
8. Publish the file
9. Click on Save

PATHWAY REVIEW CHECKLIST:

☐	Does the logical order of the steps make sense? ▪ If **NOT**, change the number order of the steps.
☐	Does the content/instructions of each step speak for itself or do I need to add more/clearer instructions?
☐	What look should my pathway have? ▪ **Multicoloured** and **informal** like a Smarties Box? Then add colour and play with font sizes. ▪ **Professional and serious**? Then use colour sparingly and standardise your fonts. Don't use screaming large fonts!
☐	Did I use the appropriate step type for each step? ▪ E.g. ensure that a **Comment** does not display an acceptance check box – implying that I have by mistake used an **Acceptance** tool instead of a **Comment** tool.
☐	Are any steps dependent on previous steps? ▪ If **YES** – Maybe add prerequisites to one or two steps?
☐	If a **Workshop** step was used as a prerequisite on a subsequent step, did I select the correct **Status** (Attended, Scheduled etc.) for the workshop prerequisite? ▪ If in doubt, open the prerequisite and check.
☐	If a **Document** step was added, did you load the document in a PDF format, which is the recommended format? ▪ If **YES**, is the document as small as it can be?
☐	Is the pathway PUBLISHED? ▪ If **NOT**, publish your pathway to your own division (and check if it is published by opening it in **USER** mode) ▪ If it is still not visible on the tree view, consider the item below.
☐	Edit the tree's branches in which your pathway is located. Are ALL levels/branches published? (Edit them one-by-one to check) ▪ If **NOT**, publish each individually (and check if your pathway is published to the Signify LMS Portal)
☐	Should everybody in the company be allowed to see and use this pathway? ▪ If **NOT**, consider adding a target audience. ▪ Remember to **REFRESH** the target audience before leaving the target audience tab.

Hopefully this exercise has stressed the importance of establishing some standard for pathway development. With standard we are referring to design aspects like:

- Fonts and font sizes

- Colours
- Standard messages and terminology when e.g. explaining how to download a document
- Use of prerequisites
- Use of images
- Capitalization of pathway step headings
- Naming conventions when loading new interventions into the libraries
- Inclusion of contact details on certain steps
- Etc.