PATHWAYS

PRACTICAL EXERCISES

MARCH 2024

V10 (Latest)

Signify SOFTWARE

CONTENTS

1. LOGIN AND LMS PORTAL PAGES

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

1. Discuss the Login Page as a group.
2. Discuss the LMS Portal Page as a group. Focus on:
    - The Administration Menu if applicable to the group
    - The LMS Portal section (search, dropdowns, courses, e-learning, PDP, quick links) of the screen
3. The Portal menu items:
    - My Profile
    - People Management
    - E-Learning Programmes
    - My Courses (If applicable)
    - My Achievements
    - Reports
    - HR Helpdesk

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.

***

Complete the following three sections as a class.

***

3. PLAN A PATHWAY COURSE OUTLINE

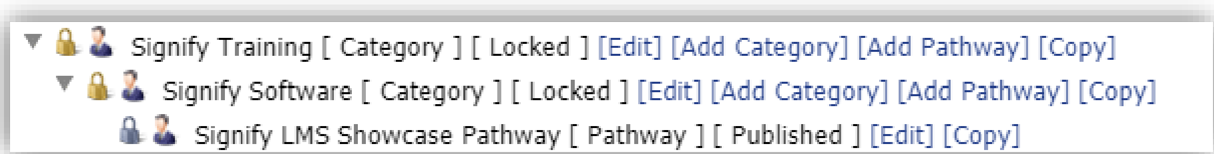
4. Using white A4 sheets, plan a general course outline.

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 to allow the administrators to effectively manage the pathways and for the users to easily locate the desired content.

*WHERE: Navigate to the Learning Portal page, then click the icon on the top-right of the screen to go to **Administration**. From the menu, go to **eLearning | Manage eLearning Library.***

- The tree/folder structure in this image is a good example of what an administrator could typically construct.



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: Navigate to the Learning Portal page, then click the icon on the top-right of the screen to go to **Administration**. From the menu, go to **eLearning | Manage eLearning Library.***

5. From the **Learning Portal** page, select the **Administration** menu.
6. **Select eLearning | Manage eLearning Library** to access the Maintain Learning Pathway section.
7. View the tree structure with all its nodes/branches.
8. Expand a few individual branches on the tree structure by clicking the ▼ icons.

6. SEARCH ON THE TREE STRUCTURE

9. 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** 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: Navigate to the Learning Portal page, then click the icon on the top-right of the screen to go to **Administration.** From the menu, go to **eLearning | Manage eLearning Library.***

10. 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.
11. Once the correct position for the branch has been determined, click Add Main Category.
12. Provide the information for the new branch/node as follows:

FIELD	CONTENT
ITEM TYPE	Category
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.
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.
PATHWAY IMAGE	Image that will display on the LMS portal.
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.

13. Click Save to save and create the new branch on the tree structure. If the branch is not immediately shown, click Refresh to update the screen.
14. Add more lower-level branches to your new level/branch if required.
15. 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.

***

Complete the following sections individually.

***

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 eLearning pathway to your branch.

WHERE: Navigate to the Learning Portal page, then click the icon on the top-right of the screen to go to ***Administration****. From the menu, go to* ***eLearning | Manage eLearning Library.***

16. 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".
17. To add a new pathway, click [Add Pathway] to display the **Pathway Node Detail** window.
18. Provide the information for the new pathway as follows:

FIELD	CONTENT
SHOW STEPS AS	**Indicator** for linear pathways, **Tabs** for a virtual classroom setup
ITEM TYPE	Pathway
PATHWAY TYPE	Ad hoc
ITEM LABEL	E.g. **My Name – Excel Training** (because you'd like to ID your pathway later)
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.
PATHWAY IMAGE	Image that will display on the LMS portal.
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.
AUTO START PATHWAY	Automatically start ONLY interactive step when opening pathway.

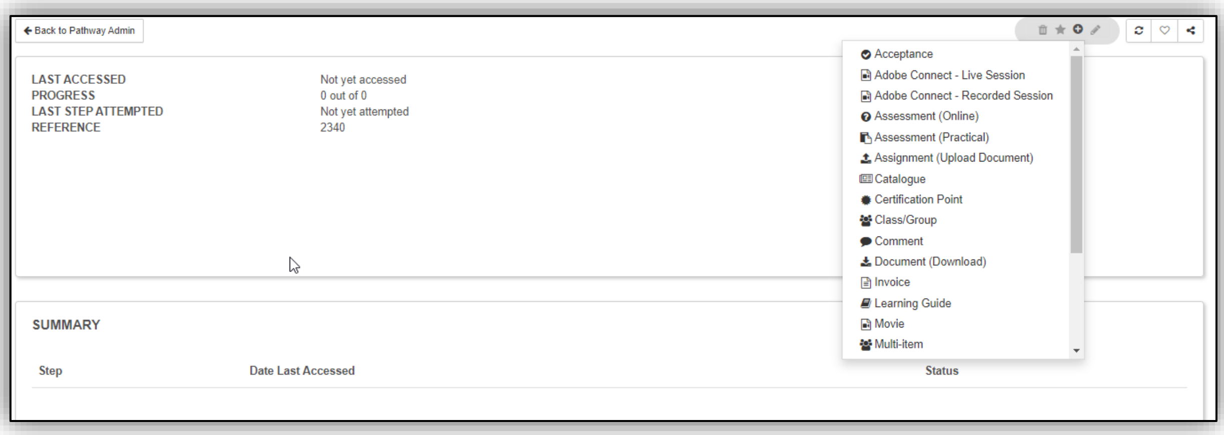
19. Click the Save button. Note the following:
    - The Pathway Node Detail tab's information is saved.
    - The Pathway Design button becomes available at the top right of the screen.

9. UNDERSTAND THE STEPS AVAILABLE ON A PATHWAY

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

*WHERE: Navigate to the Learning Portal page, then click the icon on the top-right of the screen to go to **Administration.** From the menu, go to **eLearning | Manage eLearning Library.** Locate and expand your own branch on the tree view and then click on **EDIT** on your new pathway to open it in EDIT mode. Click on **PATHWAY DESIGN** to design your course layout.*

20. When you have clicked on the Pathway Design button, you enter **EDIT** mode.
21. Locate the **Toolbox** while in EDIT mode and click the plus button ( ) to add new Steps to the Pathway. Understand the purpose of the highlighted items.



22. In this Practical Exercise, we will be using the following Steps:

PATHWAY STEP	PURPOSE
Acceptance	The learner must tick a check box to indicate their acceptance of something e.g. that they will abide by the terms and conditions.
Certification Point	To tell a learner that by completing the pathway this far he/she has reached a milestone or the end of the pathway. Can create a final learner record for the pathway if needed.
Comment	A read-only message to the learner.
Document	Provide a document which the learner can download from the pathway e.g. a manual.
User Message	Requests information FROM a learner. Typical uses include asking a learner's current job title, or their goals with the training etc.

10. ADD THE FIRST STEP TO YOUR PATHWAY

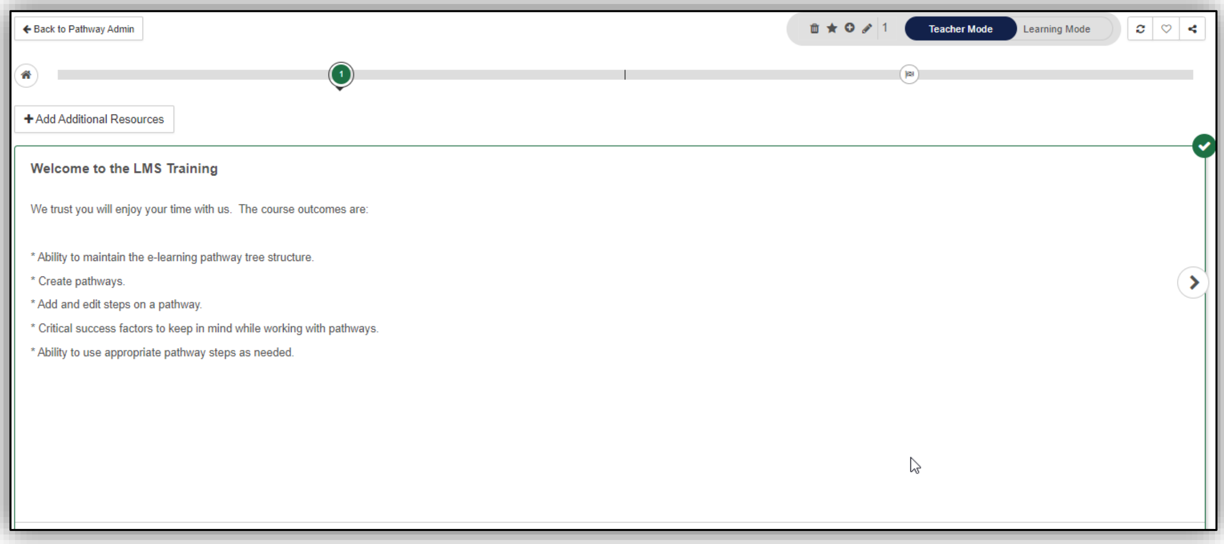
WHY: A pathway is open in EDIT mode, and we are going to add steps to the pathway.

*WHERE: Navigate to the Learning Portal page, then click the icon on the top-right of the screen to go to **Administration.** From the menu, go to **eLearning | Manage eLearning Library.** Locate and expand your own branch on the tree view and then click on **EDIT** on your new pathway to open it in EDIT mode. Click on **PATHWAY DESIGN** to add, edit, or remove course content.*

23. From the **Toolbox**, locate and click to add the **COMMENT** item.
24. A dialog box is opened.
25. Provide your information by using the following table and image as a guideline.

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 eLearning 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.

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



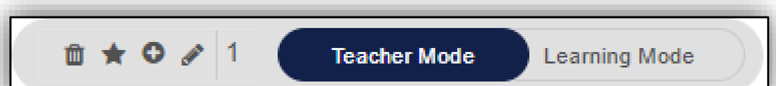
11. UNDERSTAND THE PATHWAY FUNCTIONALITIES WHEN IN EDIT MODE

WHY: When a pathway is opened in EDIT mode, certain functionalities and tools are available.

*WHERE: Navigate to the Learning Portal page, then click the icon on the top-right of the screen to go to **Administration**. From the menu, go to **eLearning | Manage eLearning Library**. Locate and expand your own branch on the tree view and then click on **EDIT** on your new pathway to open it in EDIT mode. Click on **PATHWAY DESIGN** to add, edit, or remove course content.*

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

- For the next few steps, use the WELCOME step that you have just added to your pathway. You are welcome to attempt or investigate the following actions but DON'T delete your just-added step!
- TOOLBOX Section: The toolbox is the heart of pathway design and is used to control the type of step added to the pathway. See below.



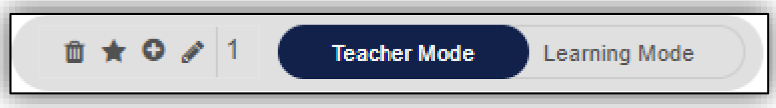
- If you have more than one Step, a Step's number can be changed by using the arrows.
- 1 will move the Step to the right. 2 will move the Step to the left.
- will edit an existing Step.
- will delete a Step.
- is used to specify prerequisites for a Step.
- is used to insert a new Step after the selected Step.

12. VIEW YOUR PATHWAY IN LEARNING MODE

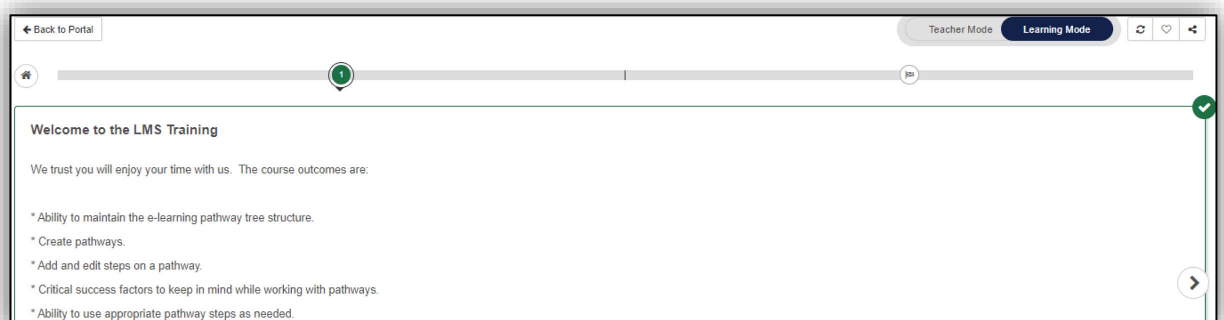
WHY: You have added your first Comment step to your pathway. How will it look when viewed by a user?

*WHERE: Navigate to the Learning Portal page, then click the icon on the top-right of the screen to go to **Administration.** From the menu, go to **eLearning | Manage eLearning Library.** Locate and expand your own branch on the tree view and then click on EDIT on your new pathway to open it in EDIT mode. Click on PATHWAY DESIGN to add, edit, or remove course content. Change the screen's mode to **Learning Mode.***

27. In the TOOLBOX section, you have the option to change how the learning content is viewed. When in Teacher Mode, content and Steps can be added, edited, and removed as necessary.



Click on Learning Mode to view the content as a learner.



28. Once done, click on Teacher Mode to return to EDIT mode.

13. 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: Navigate to the Learning Portal page, then click the icon on the top-right of the screen to go to **Administration.** From the menu, go to **eLearning | Manage eLearning Library.** Locate and expand your own branch on the tree view and then click on **EDIT** on your new pathway to open it in EDIT mode. Click on **PATHWAY DESIGN** to add, edit, or remove course content.*

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

14. ADD A SECOND, MORE INVOLVED, STEP TO YOUR PATHWAY

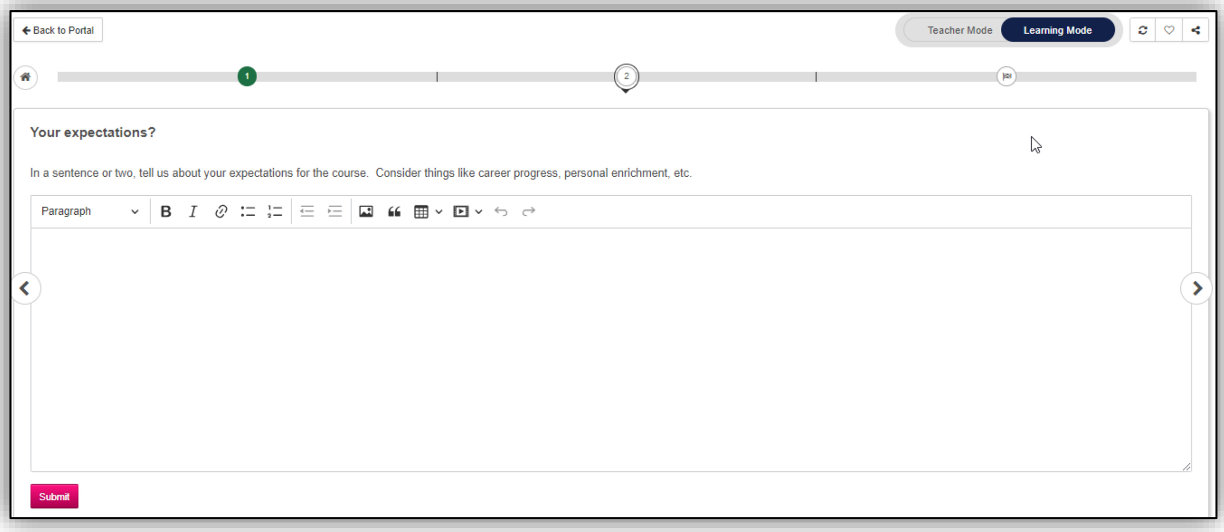
WHY: A pathway is open in EDIT mode, and we have added the first, very basic, step to the pathway. Now let's add a slightly more advanced step.

*WHERE: Navigate to the Learning Portal page, then click the icon on the top-right of the screen to go to **Administration.** From the menu, go to **eLearning | Manage eLearning Library.** Locate and expand your own branch on the tree view and then click on **EDIT** on your new pathway to open it in EDIT mode. Click on **PATHWAY DESIGN** to add, edit, or remove course content.*

32. From the **Toolbox**, locate and click to add the **USER MESSAGE** pathway item. (This kind of step is usually used when e.g. asking learners what their expectations are about the course.)
33. A dialog box is opened, requiring certain information from the administrator.
34. 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!)
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.

35. After completing all the relevant fields, click **Save** to create the user message step and display it on the pathway.
36. Change to **Learning Mode** to see how the step is displayed.



37. Switch back to **Teacher Mode**.

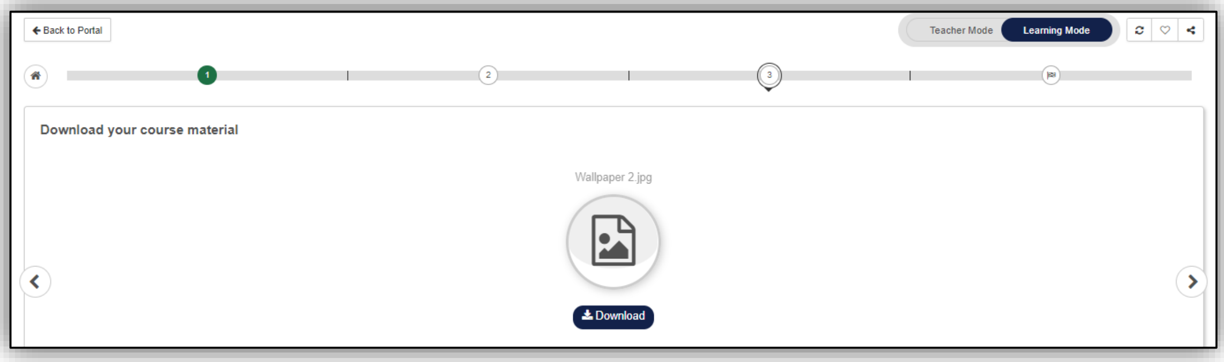
15. ADD A DOCUMENT STEP TO YOUR PATHWAY

*WHERE: Navigate to the Learning Portal page, then click the icon on the top-right of the screen to go to **Administration.** From the menu, go to **eLearning | Manage eLearning Library.** Locate and expand your own branch on the tree view and then click on **EDIT** on your new pathway to open it in EDIT mode. Click on **PATHWAY DESIGN** to add, edit, or remove course content.*

38. From the **Toolbox**, locate and click to add the DOCUMENT pathway item. (This kind of step is used when a learner must download course material or even terms and conditions.)
39. A dialog box is opened, requiring certain information from the administrator.
40. 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!)
REFERENCE DESCRIPTION	Download your course material
FILE NAME	Click CHOOSE FILE to select any smallish file from your PC
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.

41. After completing all the relevant fields, click Save to create the document step and display it on the pathway.
42. Change to **Learning Mode** to see how the step is displayed.



43. Switch back to **Teacher Mode**.

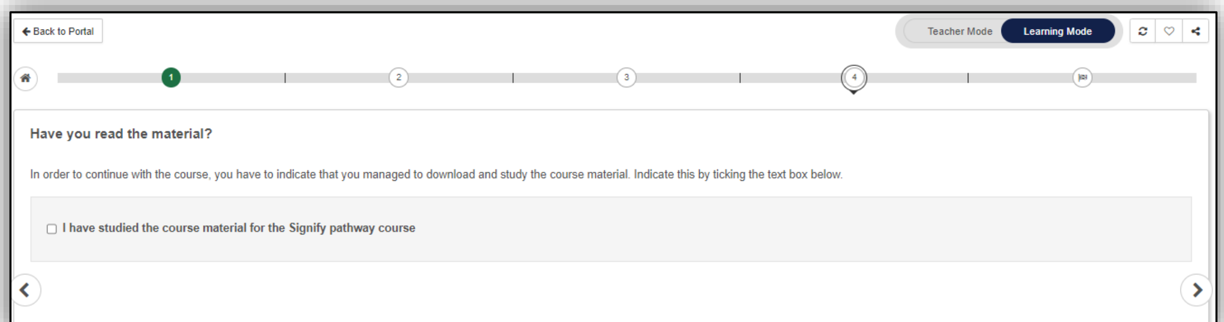
16. ADD AN ACCEPTANCE STEP TO YOUR PATHWAY

WHERE: Navigate to the Learning Portal page, then click the icon on the top-right of the screen to go to ***Administration****. From the menu, go to* ***eLearning | Manage eLearning Library****. Locate and expand your own branch on the tree view and then click on* ***EDIT*** *on your new pathway to open it in EDIT mode. Click on* ***PATHWAY DESIGN*** *to add, edit, or remove course content.*

44. From the **Toolbox**, locate and click to add the **ACCEPTANCE** pathway item. (This kind of step is used when a learner must acknowledge something e.g. the terms and conditions, or even that they have read a document.)
45. A dialog box is opened, requiring certain information from the administrator.
46. 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!)
REFERENCE DESCRIPTION	Have you read the material?
ACCEPTANCE TITLE	I have studied the course material for the Signify pathway course
DESCRIPTION	To continue with the course, you must 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

47. After completing all the relevant fields, click Save to create the acceptance step and display it on the pathway.
48. Change to **Learning Mode** to see how the step is displayed.



49. Switch back to **Teacher Mode**.

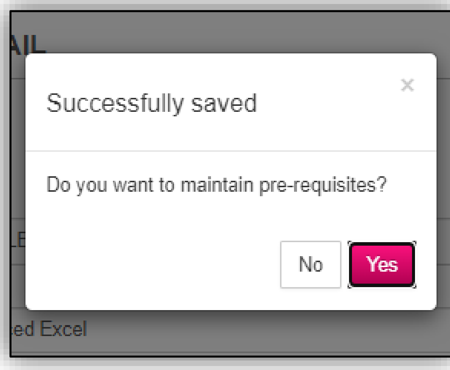
17. ADD A CERTIFICATION POINT STEP TO YOUR PATHWAY

WHERE: Navigate to the Learning Portal page, then click the icon on the top-right of the screen to go to ***Administration.*** *From the menu, go to* ***eLearning | Manage eLearning Library.*** *Locate and expand your own branch on the tree view and then click on* ***EDIT*** *on your new pathway to open it in EDIT mode. Click on* ***PATHWAY DESIGN*** *to add, edit, or remove course content.*

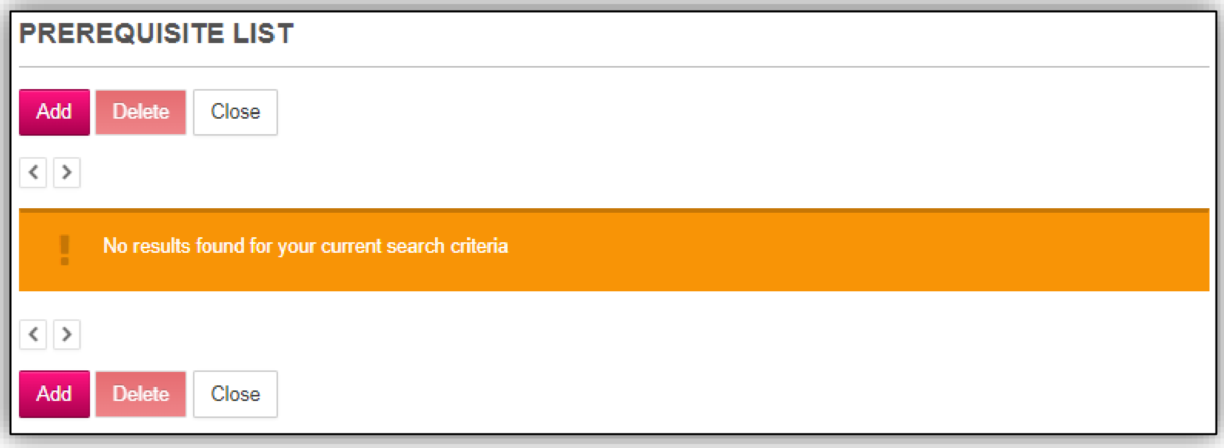
50. From the **Toolbox**, locate and click to add the **CERTIFICATION POINT** pathway item. (This kind of step is used to determine if a learner has completed all relevant steps and then to issue a final training record.)
51. Provide the required information as shown below.

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 meet 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

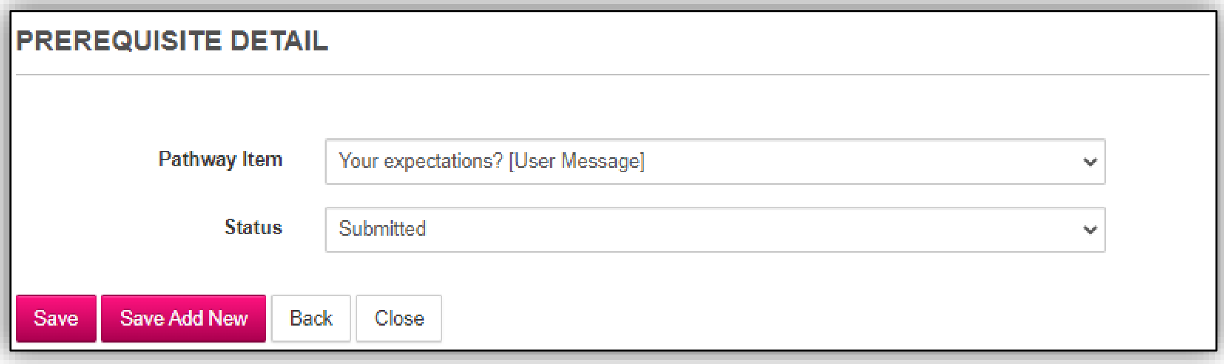
52. After completing all the relevant fields, click Save to create the certification point step and display it on the pathway.
53. A window will pop up, asking if you would like to maintain the pre-requisites for the Step.



54. Click on Yes to add pre-requisites.

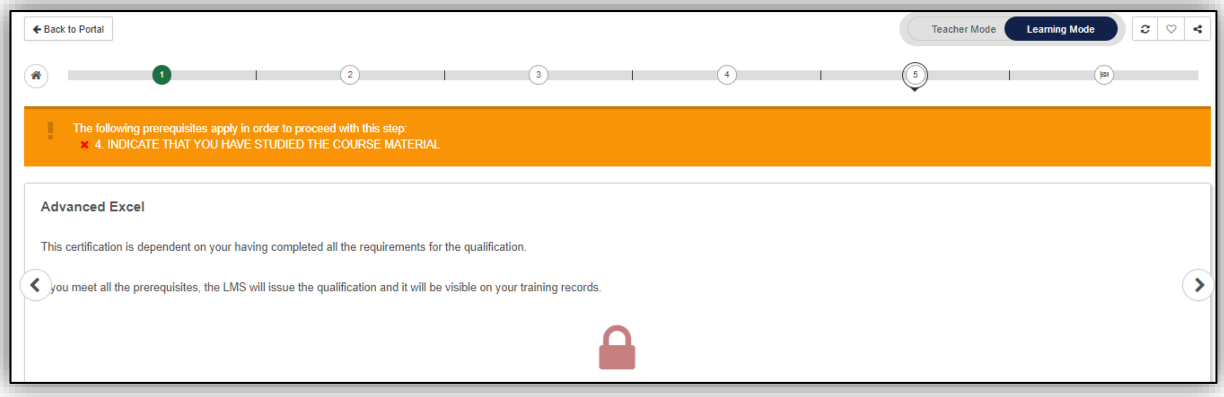


55. Click on ADD to set up the pre-requisites for the course. Ensure the correct Pathway Item and Status is selected from the drop-down menus. Click on SAVE if you are happy with only adding a single pre-requisite. Click on SAVE ADD NEW if there are multiple pre-requisites for a course.



Click on **CLOSE** if you are done.

56. Change to **Learning Mode** to see how the step is displayed.



57. Switch back to **Teacher Mode**.

18. ADD MORE STEPS TO YOUR PATHWAY

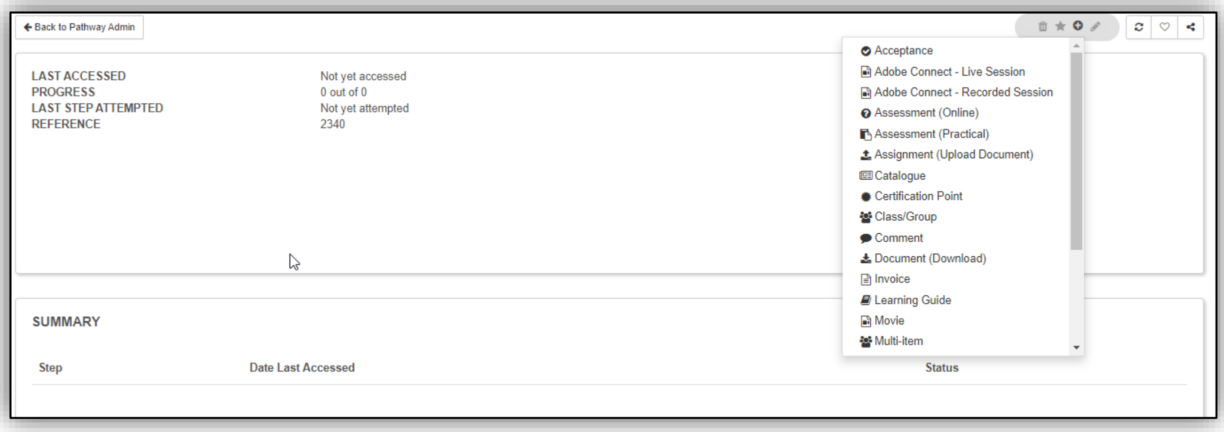
WHY: Your first pathway steps have been added. Let's add a few more if required.

*WHERE: Navigate to the Learning Portal page, then click the icon on the top-right of the screen to go to **Administration**. From the menu, go to **eLearning | Manage eLearning Library**. Locate and expand your own branch on the tree view and then click on **EDIT** on your new pathway to open it in EDIT mode. Click on **PATHWAY DESIGN** to add, edit, or remove course content.*

A pathway guides a learner through certain steps to achieve a pre-determined outcome which could be a certification, accreditation, update on a policy, or 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)*

58. On your pathway, use the Toolbox 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 must tick a check box to indicate their acceptance of something e.g. that they will abide by the terms and conditions.
Certification Point	To tell a learner that by completing the pathway this far he/she has reached a milestone or the end of the pathway.
Invoice	The learner must type in their details for the system to generate an invoice. Usually, the invoice must be paid before the learner can continue with the course.
Comment	A read-only message to the learner.

Training Workshop	This step allows the user to book on a course published in the Event Management module.
Document	Provide a document which the learner can download from the pathway e.g. a manual.
Assessment (Online)	Let the learner do an online test/assessment of what they have learned.
Assessment (Practical)	Let the learner do a practical test/assessment of what they have learned.
Assignment (Upload Document)	Allow the learner to upload a document as part of an assignment.
User Message	Requests information FROM a learner. Typical uses include asking a learner's current job title, or their goals with the training etc.
Learning Guide	Store a document in the LMS's central document repository and allow learners to download it from there.
Movie	Add a video to the path that can be logged to the learner record.
Multi-item	Add certain Steps within a Step.
Pathway Connector	Link the current Step to another Step in a different Pathway.
SCORM / xAPI	Insert interactive eLearning content into the Pathway.

59. Remember to often switch to **Learning Mode** to see how the step is displayed.
60. Switch back to **Teacher Mode** to continue your design.
61. On many steps, you will note two fields at the bottom of pages. Here is what they are used for:

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.

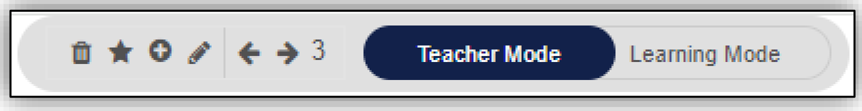
When you need to temporarily prevent users from working on a step (e.g. because you need to update an outdated downloadable document), lock the step, fix what needs to be fixed and then unlock the step again.

19. RENUMBER STEPS ON A PATHWAY

WHY: You have added a couple of steps on your pathway. Occasionally their numerical order is not logical and need to be changed.

*WHERE: Navigate to the Learning Portal page, then click the icon on the top-right of the screen to go to **Administration.** From the menu, go to **eLearning | Manage eLearning Library.** Locate and expand your own branch on the tree view and then click on **EDIT** on your new pathway to open it in EDIT mode. Click on **PATHWAY DESIGN** to add, edit, or remove course content.*

62. If you have more than one Step, a Step's number can be changed by using the arrows in your **Toolbox**.
    will move the Step to the right. will move the Step to the left.



63. The **Home** button will show you how the course will be navigated by the learner.

SUMMARY

Step	Date Last Accessed	Status
1. WELCOME	3/8/2024 11:52	Viewed
2. TELL US ABOUT YOUR COURSE EXPECTATIONS		Not Submitted
3. DOWNLOAD AND STUDY THE COURSE MATERIAL		Not Downloaded
4. INDICATE THAT YOU HAVE STUDIED THE COURSE MATERIAL		Not Accepted
5. COMPLETION QUALIFICATION		Not Completed

The **Custom Main Header** you have typed in each Step will be the name found in the Course Summary table on the **Home** page.

***

Discuss the principles of PREREQUISITES on a step as a class.

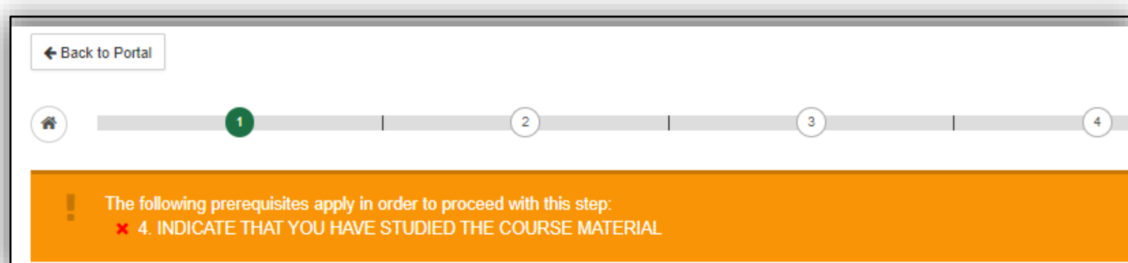
***

20. 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: Navigate to the Learning Portal page, then click the icon on the top-right of the screen to go to **Administration**. From the menu, go to **eLearning | Manage eLearning Library**. Locate and expand your own branch on the tree view and then click on **EDIT** on your new pathway to open it in EDIT mode. Click on **PATHWAY DESIGN** to add, edit, or remove course content.*

64. We assume you have added a few of the steps in the preceding section.
65. Locate one of the steps added last to your pathway and click the icon in the **Toolbox**.
66. The **Prerequisite** dialogue opens, where you have the option to add or delete pre-requisites.
67. 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)
68. After making the selection, click and close the window.
69. You will see that the step now contains the prerequisite. As explained earlier, multiple pre-requisites can be added at once on the **Prerequisite Detail** page.



70. Click on **Learning Mode** to see how the step is displayed.

71. Switch back to **Teacher Mode** to continue your design.

***

Discuss the principles of a TARGET AUDIENCE on a pathway as a class.

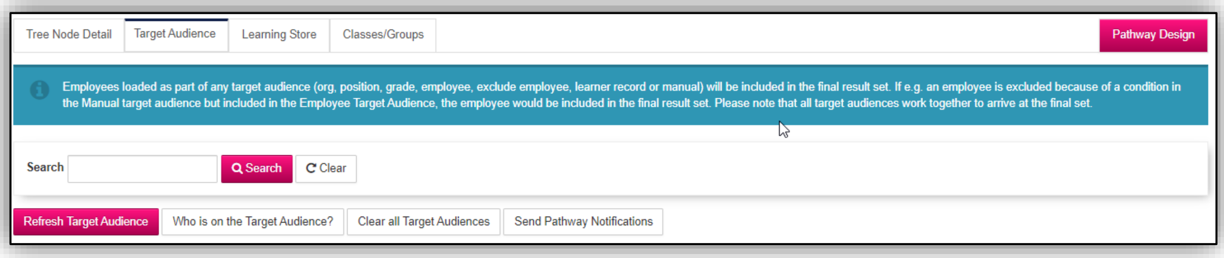
***

21. SPECIFY A TARGET AUDIENCE FOR A PATHWAY

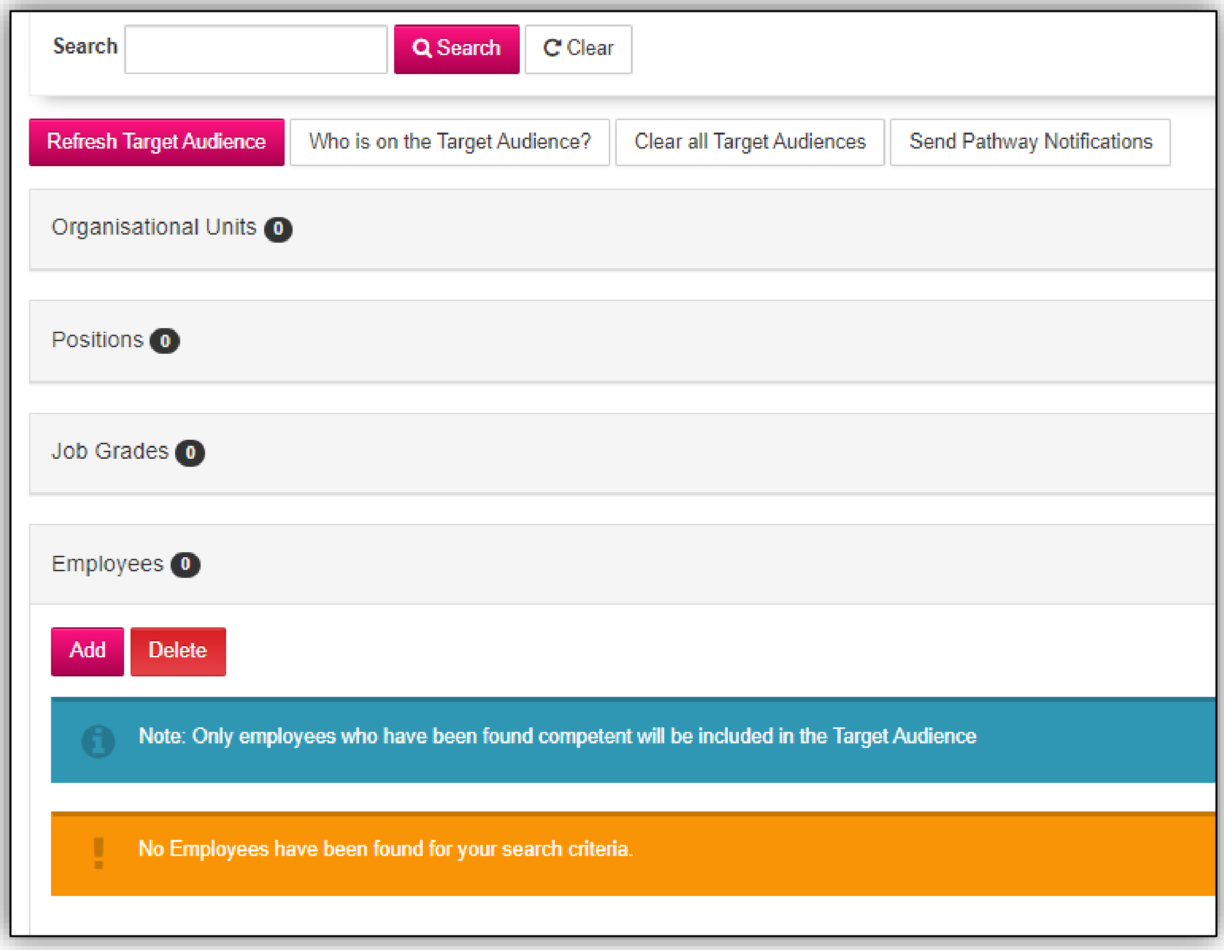
WHY: Some pathways are created for selected employees (called a target audience) only. Even though the pathway is to be published, only these employees should see the pathway when advertised. Although a target audience can be specified in 3 ways, we will only practise adding specific employees to the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

*WHERE: Navigate to the Learning Portal page, then click the icon on the top-right of the screen to go to **Administration.** From the menu, go to **eLearning | Manage eLearning Library.** Locate and expand your own branch on the tree view and then click on **EDIT** on your new pathway to open it in EDIT mode. Click the **Target Audience** tab.*

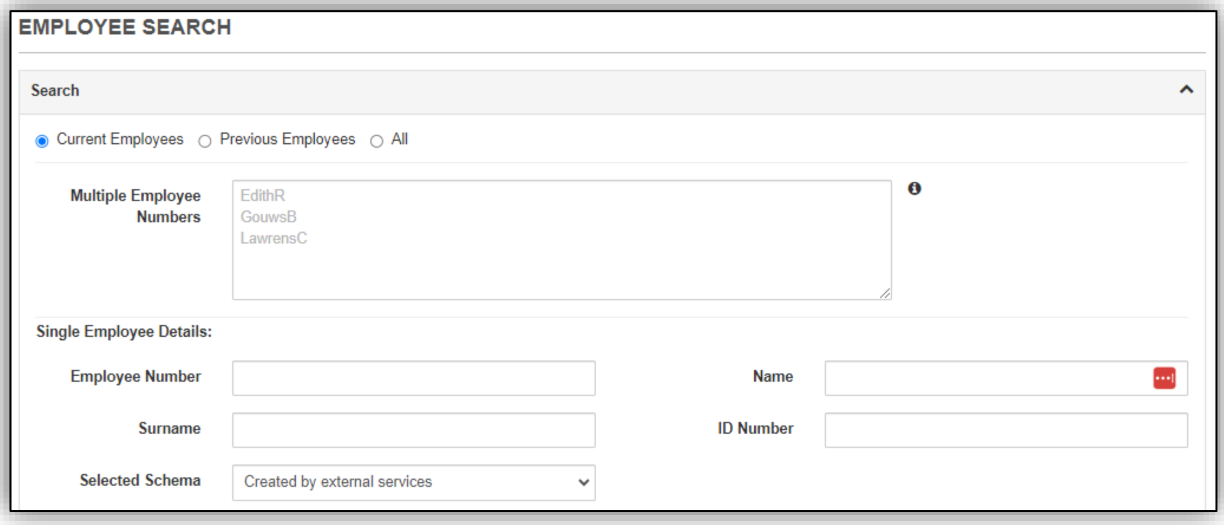
72. To modify the target audience of a pathway, click the **Target Audience** tab at the top of your pathway.



73. To indicate that the target audience is to be applied based on individual employee numbers, select the **Employees** menu, and click on **Add**. The number in the grey circle next to **Employees** indicates how many individuals are in the target audience.



74. Once you have clicked **Add**, the **Employee Search** menu will pop up. Multiple employees can be added using their employee numbers, or single employees, or a specific subgroup.



75. Tick the checkbox next to an employee's name, then click Select to transfer them to the target audience screen.
76. NB: Click Refresh Target Audience to apply the target audience to the pathway. (if this button is present)
77. 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 public.

22. REMOVE A TARGET AUDIENCE FROM A PATHWAY

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

WHERE: Navigate to the Learning Portal page, then click the icon on the top-right of the screen to go to ***Administration.*** *From the menu, go to* ***eLearning | Manage eLearning Library.*** *Locate and expand your own branch on the tree view and then click on* ***EDIT*** *on your new pathway to open it in EDIT mode. Click the* ***Target Audience*** *tab.*

78. To modify the target audience of a pathway, click the **Target Audience** tab at the top of your pathway screen.
79. 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.

80. **NB:** Click Refresh Target Audience to ensure that the target audience is adjusted/removed (if this button is present).
81. 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 public.

23. PUBLISH YOUR PATHWAY

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

*WHERE: Navigate to the Learning Portal page, then click the icon on the top-right of the screen to go to **Administration.** From the menu, go to **eLearning | Manage eLearning Library.** Locate and expand your own branch on the tree view and then click on **EDIT** on your new pathway to open it in EDIT mode.*

82. Once you are in the **Pathway Node Detail** tab, locate the **Item Status** field and set it to **Published**.
83. Change the **Development Status** to **Can be Published**.
84. Locate the **Show on Portal** field and ensure it is ticked.
85. To check whether your pathway was really published, go back to the main startup/portal page, and locate your pathway from there.
86. Open any of your colleagues' pathways if you can see them.

24. OPEN YOUR PATHWAY FROM THE PORTAL AS IF YOU WERE A USER

WHY: Once published and checked, the final step is to review your pathway as it would be seen by the users.
*WHERE: From the Learning Portal page, click the **eLearning** button.*

87. On the LMS Portal page, search for and click to open your own pathway.
88. The pathway is opened in user mode, working exactly as it would for normal users.

25. REVIEW YOUR PATHWAY

WHY: A pathway is normally published to an audience, whether a specific audience or even companywide. 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: Navigate to the Learning Portal page, then click the icon on the top-right of the screen to go to **Administration.** From the menu, go to **eLearning | Manage eLearning Library.** Locate and expand your own branch on the tree view and then click on **EDIT** on your new pathway to open it in EDIT mode.*

89. **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 **Learning 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

***

As facilitator, review a good number of finished and published pathways for the class to see what the other learners did. This step teaches learners to be more critical of their own pathways and highlights excellent tips.

***

26. MONITOR LEARNERS' PROGRESS ON A PATHWAY

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

*IF YOU ARE LOST: Navigate to the Learning Portal page, then click the icon on the top-right of the screen to go to **Administration.** From the menu, go to **eLearning | Manage eLearning Library.***

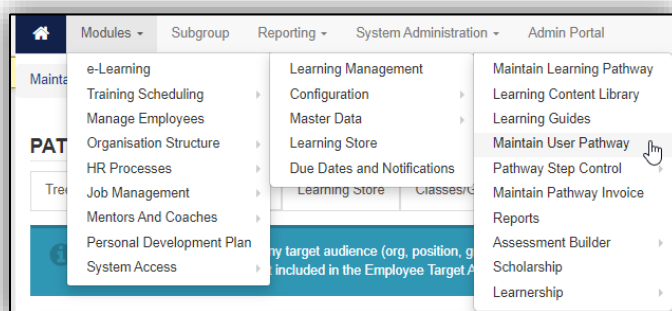
90. From the Tree View, locate and open your pathway. Go to the Preview tab.
91. Locate and click the View Progress button. Adjust the search dates if needed and click Search to display a list of all learners on your pathway with their progress.

27. 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 their allowed number of attempts on an assessment and has asked for an additional retry attempt.

*WHERE: Navigate to the Learning Portal page, then click the icon on the top-right of the screen to go to **Administration.** From the menu, go to **eLearning** and click on **Show More**. Under **Administration**, click on **Rollback Pathway Status**.*

92. Navigate to the Rollback Pathway Status page by going to eLearning | Show More | Administration | Rollback Pathway Status. Alternatively, select a specific pathway and navigate to the Target Audience tab, then look for the Maintain User Pathways menu at the very top of the page by selecting Modules | eLearning | Learning Management | Maintain User Pathway.



93. A list of employees is shown.
94. 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.
95. Locate and click the record of the pathway that you would like to administrate.
96. The **Pathway Item List** page is displayed. This page contains a list of the steps making up the pathway you had selected.
97. Select the step in the pathway which you would like to query or change.
98. 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**.

***

Discuss the Training Intervention Library as a class. Note the importance of a formalised naming convention e.g. *Company Name – Intervention Title – Year – Version Number*

***

28. LOAD A TRAINING INTERVENTION INTO THE LIBRARY

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

*WHERE: Navigate to the Learning Portal page, then click the icon on the top-right of the screen to go to **Administration.** Click **Training Interventions** under **Learning Libraries**.*

99. 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.

100. 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 their own Training History records.

29. 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: Navigate to the Learning Portal page, then click the icon on the top-right of the screen to go to ***Administration.*** *From the menu, go to* ***eLearning | Manage eLearning Library.*** *Locate and expand your own branch on the tree view and click on* ***EDIT****.*

101. Locate the pathway you'd like to copy, then click the **COPY** hyperlink.

102. Type a part of the destination folder's name or click Search to see the entire pathway folder structure.
103. Select the destination folder and click Copy. Click OK to acknowledge the source pathway and the destination folder.
104. 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.:
    i. Assessments are delinked on assessment steps and must be re-linked to the correct assessment.
    ii. Documents are dropped on document steps and must be re-linked.
    iii. SCORM and ZIP folders are dropped from their respective steps and must be re-linked.
    iv. All steps where learner records have been logged are cleared and the correct interventions need to be provided.

105. 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.

30. 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: Navigate to the Learning Portal page, then click the icon on the top-right of the screen to go to ***Administration.*** *From the menu, go to* ***eLearning | Manage eLearning Library.*** *Locate and expand your own branch on the tree view.*

- 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 **eLearning | Show More | Lists | Reports**.
- Discuss the working of SCORM files and ZIP folders.