Pathway Preview Tab

Overview of the Preview Tab

The Pathway Preview tab is where the Pathway Administrator works to create the pathway. The Pathway Category and Pathway details are created in preparation for the Pathway. The Pathway is the main course and desert of the e-Learning module.

Understanding the layout of and functionality available on a pathway screen is important to help a pathway designer be as efficient as possible.

Focus Areas: Pathway Preview tab



Back to the Treeview

Click on the **Maintain TreeView** link to go back to the Pathway Treeview. After creating a Pathway, it is good to confirm that the Pathway was created in the correct Category. You can also confirm this by reviewing the Breadcrumb trail.

View Modes: Preview as User and Edit Pathway

The system remembers which mode you last accessed the Pathway in as an Administrator, so make sure to switch back to Edit Pathway before you navigate away from the Pathway.

The Pathway Preview tab has two view modes the Administrator can use when building and testing a pathway. Edit mode and View mode.

Edit Mode

Edit mode is the default mode when viewing a Pathway for the first time. It is used by administrators when creating and editing the pathway.

How will you know you are working in Edit mode? Make sure to look out for the following:

- The Preview as User button is displayed - Click on this button to view the Pathway as a User
- View/Edit Mode is set to Edit
- You can see the Legend with options such as Edit Item, Remove-Item, etc.



Preview as User

View mode is used by Administrators to view the Pathway through the eyes of a regular user.

How will you know you are working in View mode? Make sure to look out for the following:

- The Edit Pathway button is displayed - click on this button to edit the Pathway
- Track Mode is set to User Mode
- View/Edit Mode is set to View
- You can see the Legend with very limited options - only Edit Item and View/Update/Rollback Item is available



Legend



Edit Item:

- Click on this icon next to a step to **edit** the step details.
- Only the details of the step are editable, the step type cannot be changed after the step is created.

Remove Item:

- Click on this item next to a step to **delete** a step from the pathway.

Pre Requisites:

- Click on this icon to add **prerequisites** for a step.
- These prerequisites are always dependent on steps preceding the current step. Where a prerequisite was added to a step, that prerequisite becomes part of the step and the user cannot continue unless the prerequisites have been met.
- Pre Requisites can only be added from the second step onwards.

Add Item in position:

- **Insert** a new step in the position of the current step.
- The current step and all subsequent steps will be moved one step up.

Update Pathway Step Order:

- To update the Pathway step order click on the up or down arrows as indicated below.



Toolbox

The toolbox is the heart of pathway design and is used to control the type of step added to the pathway.



General Guidelines

The following general guidelines should be kept in mind when using the Toolbox:

- When a toolbox item (e.g. Comment) is selected, it creates a new step and this step is always added at the end of the pathway.
- When a toolbox item is selected, the system will open a screen requiring information pertaining to the particular step e.g. if Comment was selected, the details of the comment must be completed.
- Once a step of a certain kind has been selected, the step type cannot be changed. If the incorrect step type was selected, the step must be deleted and a new step of the correct type must be added.

Text box element:

- Some of the fields available in the Toolbox can be formatted in terms of font color, font size, font type etc. Even images can be loaded into these fields.
- Care must however be taken because the formatting tools available to these fields are limited.
- Do NOT copy and paste large blocks of formatted text from other programs (Word or Excel, for example) straight into these fields. The existing formatting in these blocks of text will cause the field’s own formatting to misbehave.

- Always copy text from other programs to Window’s Notepad (to remove any pre-existing formatting) and from Notepad into the toolbox element’s field. Then apply the required formatting IN the field.
- Text typed into these fields is NOT checked for spelling.

Toolbox Items to add

When adding a new step to a pathway, consider the following:

- What type of content do you want the user to have access to?
- Where in the Pathway do you want the step to be displayed?
- What information will the user need in order to get the most out of the Pathway step?

The different types of steps is discussed in more detail in the next section.

> **Get Started:** Click on the Comment item in the Toolbox and complete the required details to create your first Pathway step.

Add a Prerequisite

Prerequisites are used to manage the order in which pathway steps are completed. When a Prerequisite has been set up, the learner is required to meet the requirements of the proceeding step before gaining access to the next step.

How to create Prerequisites for a Pathway Step



Find the step you want to add a Prerequisite to and click on the Prerequisite icon. The Prerequisite list screen will open.

> **Get Started:** Click on the Prerequisite item next to a Pathway step and complete the required details to add a Prerequisite.

Prerequisite List screen (No Prerequisites)



Prerequisite Detail screen



The **Prerequisite Detail** page contains two fields:

Pathway Item:

- This drop down contains a list of all steps which can be selected as a Prerequisite for this step.
- Only steps which require some interaction with the learner with a measurable outcome will be displayed in the list.
- Examples of steps which can be used as Prerequisites include a document, acceptance, SCORM, online assessment.

Status:

- The Status values available for selection will change depending on the **Pathway Item** selected.

Click on the **Save** button to save the selected Prerequisite.

Click **Back To List** to view the list of Prerequisites for this pathway step.

More than one Prerequisite can be added to a pathway step by repeating the process.

Prerequisite List screen (Prerequisites added)

The Prerequisite item added to the step is added to the Prerequisite list.



Existing Prerequisites can be deleted by selecting the check box next to the item you want to delete, and clicking the **Delete** button.

To get back to the Pathway Preview tab, click on the **Close** button.

How the Administrator sees a Pathway step with Prerequisites

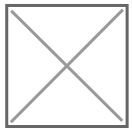
Prerequisites not met

The image below shows a Pathway step where the Prerequisite has not been met yet.



Prerequisites met

The image below shows a Pathway step where the Prerequisite has been met.



How a learner sees a Pathway step with Prerequisites

Prerequisites not met

The image below shows a Pathway step where the Prerequisite has not been met yet.



Prerequisites met

The image below shows a Pathway step where the Prerequisite has been met.



Maintain User Pathway

How did I get here?

From the portal, click System Administration | e-Learning | Learning Management | Maintain Learning Pathway | Select Edit on the Pathway you are working on

How to access Maintain User Pathway

Sometimes it happens that a user is unable to complete a pathway step in the system. If this happens, the Maintain User Pathway functionality allows the Pathway Administrator to update the step status on behalf of the pathway user.



Click on the Maintain User Pathway button to open the Pathway Employee List. Click on the Search button to return a list of employees who attempted the pathway within the specified dates.



Click on the name of the person whose pathway step you want to edit. The Pathway item list will open. This page contains a list of all pathway steps and indicates the status of the user for that specific pathway step. Use the search functionality to search for a specific learner/employee.



Click on the Refresh Pathway Item Statuses button to ensure the latest statuses are displayed. Click on the step you want to edit to view more detail regarding that step.



The Pathway Item Status can be updated from here.

- Click on the Status drop-down to update the Pathway Item Status.
- Click on the Save button to apply the change.

To return to the Pathway:

- Click on the Close button on the Pathway Item Detail Page to return to the Pathway Item List.
- Click on the Back To List button to return to the Pathway Employee List.
- Click on the Close Window button to return to the Pathway.

Rollback Button:

- For pathway steps where a learner record was created, a checkbox is displayed: Remove this item from the learner record on Save or Rollback.
- When this checkbox is selected, and Save or Rollback is selected, the learner record is removed.

Try It Out:

> Navigate to a pathway you are working on and click on Maintain User Pathway. Update the Pathway Item Status for a specific learner/employee.

View Progress

How did I get here?

From the portal, click System Administration | e-Learning | Learning Management | Maintain Learning Pathway | Select the Pathway you are working on

How to access View Progress

As part of the Learning and Development Department, you may want to view the progress of learners/employees for a specific pathway. The View Progress button allows you to do just that.



Click on the View Progress button to open the Employee Pathway Progress page. Use the search functionality to search for a specific learner/employee.



This page or report displays a list of employees who have attempted this pathway. Some employee information is displayed to the left and then the pathway steps are listed to the right. The status of the specific pathway step is displayed for that learner/employee.

What can you do on this page?

- You can search for a specific employee
- Print the Employee Pathway Progress Report to PDF
- Export the search results to Excel

To Return to the Pathway:

- Click on the X at the top of the window to close the window.

> **Try It Out:** Navigate to a pathway you are working on and click on View Progress. Export the results to Excel.

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