

EthosCE Training Crash Course

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Welcome!

Introduction

Welcome to EthosCE! This Crash Course document includes a summary of the training with helpful links to our User Guide! These links can act as a refresher if you can't recall a specific from training. Feel free to search the user guide for any extra information that might help you with building your site and course!

Link to User Guide

<https://ethosce.atlassian.net/wiki/spaces/ECE/overview?homepageId=1671172>

Standard EthosCE Roles

- **Site Admin:** This user has the ability to access and change global settings and configurations. They can create and edit all forms of content, manage users, create certificates, and review global and store reports.
- **Course Admin:** This user can create courses and pages. They can also edit **any** course or page. Course Admins can review reports and manage user enrollments at the course level.
- **Course Author:** This user can create courses. Unlike course admin, they only edit their *own* courses. Course authors can review reports and manage user enrollments at the course level for their *own* courses.
- **Report Viewer:** This user can view various administrative reports.
- **Reviewer:** This user can review unpublished courses. Cannot modify or create content.
- **Support:** This user can add or edit view enrollments, orders, users, user profiles, masquerade. They cannot modify or create content.
- **Authenticated User:** An authenticated user is the default role in the system; the system allows the user with this role to access content that they would otherwise need to be logged in to see.

User

New User Registration

- To register a new user, use the “**Register**” button on top right hand corner
- The “Create New Account” window will appear
- <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6259230/Registration>

My Account

- Activities (AKA Courses, Events, etc.)
 - Pending - Activities the user is currently enrolled in or are participating in.
 - <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6259340/Viewing+Learner+s+Pending+Activities>
 - Completed - Activities the user has completed.
 - External Credit - Informational Repository for personal use.
 - <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6259222/External+Credit>
- Bookmark - The user’s saved activities.
 - <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6259206/Bookmarking>
- Orders - Any activity the user has paid for.
 - <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6258773/Orders>

Navigation

- Top Navigation
 - Editable! Can change menu items, add new ones, and remove old ones.
- Search Bar
 - Fully integrated into the courses. For instance, you can search a term that’s in a quiz, and the search bar will bring them to that course that holds that quiz

Site Admin

Content

- Admin Tools
 - Wrench “Manage”
 - List of all editable and manageable items
 - “Go To”
 - Direct search to all items in the “Wrench” tool
 - Easy Access - If you know what you’re searching for, it’s much more direct. For instance, searching up “Menu” as opposed to going through “Manage > Structure > Menus,” etc.
- Manage Content
 - Admin theme is utilitarian, so you won’t see your site’s theme on this set of screens.
 - Broken into 3 different areas:
 - Top - Includes filters (allows us to filter out criteria)
 - Bottom - Results that are affected by filters at the top
 - Can sort columns by clicking the title
 - Middle- Bulk operations
 - Can multiselect content: publish, unpublish, or clone.
- Publishing Settings
 - What it means:
 - Courses are **unpublished** at creation
 - A lot of steps to take to get courses “Published Ready”
 - **Unpublished** - Content that is only viewable from admin and reviewers
 - Not viewable from the course catalog and users cannot find it by clicking around.

☆ **DO NOT** unpublish a course after it's been published - it will revoke all credit and certificates from those users

- <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6259168/Publishing+Content>

Manage Homepage

- Blocks - Where you edit!
 - <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6259194/Explanation+of+Available+Blocks>
 - HTML Block - Any text or images you want to add
 - Course Listing - Shows users what courses they can take
 - Slide Show
 - Either full image or text and image
 - Created as a piece of content
 - <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6259190/Adding+Slides+to+Home+Page+Slideshow>
 - Calendar
 - Displays Live Published Events (Only from EthosCE)
 - Shows date and start time
 - Ability to download ICS file
 - <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/1668251652/Calendar>
- Top Navigation Menu
 - “Go to” > “Menu” > Structure - Menu > Main Menu > List Links
 - You can reorder by clicking and dragging
 - You can add by hitting “+add link”
 - <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6259101/Creating+a+New+Menu+Item>
- Theme
 - Change site theme colors for overall look and feel.
 - Add your institution's logo!
 - <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/80254229/Colorize+theme>
- Footer

- WYSIWYG (*What You See Is What You Get*) Editor
- <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/48070671/Editing+the+Site+Footer+Text>
- Rich Text Editor
 - Font related buttons are excluded from these blocks.
- Media Browser
 - Used to embed images and media from outside of EthosCE
 - You can link to external videos.
 - There are “global” and “personal”
 - <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6259182/Uploading+an+Image>
 - <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6259184/Working+with+Images>
 - <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6259176/Library+My+Files>

User Management

- Bulk Operations
 - Can bulk enroll, e-mail, etc.
- Assigning Roles
 - <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6259310/Roles+and+Permissions>
- Masquerading
 - Ability to login as a non-admin account
 - Available from the user’s profile page
 - <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6259314/Switch+Users+-+Masquerade>
 - All activities and logins are registered for that user
 - You can switch back from the top bar, next to name (“Switch Back”)
 - <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/48070675/Switch+back+-+Masquerade>
- Merge Users

- Sometimes people have two profiles or two emails registered. This is used to merge those two profiles.
 - <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6259307/Merging+Users>
- Under “Wrench > Admin > Merge Users”
- Course Credit Log
 - Record of modified credits
 - <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6259264/Course+Credit+Log>
- Deleted Credit Log
 - Record of deleted credits
 - <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6259266/Deleted+Credit+Log>

Course Admin

Course Workflow

- Landing Page - Where your users will first find themselves, sort of a “homepage” for your course.
 - Course summary block shows:
 - Enabled credits
 - Course dates
 - Pricing
 - Rating
 - Bookmarking
 - Overview:
 - Program description
 - Target audience

- File attachments
 - Related courses
- Program:
 - Program details
- Venue:
 - Venue location address
 - Link to venue
 - Venue image
 - Venue information
 - Travel information
- Accreditation:
 - Accreditation information
 - Available credits
 - Learning objectives
 - Accreditation period
- Faculty:
 - Faculty information
 - Disclosure link
- Register:
 - Price
 - Registration instructions
 - Required hardware/software
- Credit Claiming
 - Allows the learner to select which credit type they would like to be awarded.
 - Full details will appear once the credit is selected.
 - <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/50659344/Credit+Claiming>

Course Cloning

You will rarely find yourself creating a course from scratch. Our course cloning feature will allow you to take a general course, with all of the basic settings intact, and clone it to create a brand new course that you can fill in with the relevant information.

<https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6258962/Cloning+a+Course?src=search>

Anatomy of a Course

- This diagram provides a high level overview of the parts of a course as set up within the EthosCE LMS. Courses are flexible in capabilities, and therefore contain a lot of settings.

Diagram:

Course Shell

- Course Title
- Course Description
- Credits and Certificate Mapping
- Target Audience, Objectives, Start and End Dates, Cost, etc.

Course Outline

Course Page

Basic page with text, media, etc.

Book

Collection of static pages in a hierarchy

Quiz Shell

Quiz name, question delivery, passing grade, attempts, etc.

Quiz Pages and Questions

- Pages for Multiple Questions
- Long Answer Questions, Short Answer Questions, Matching, Multiple Choice, True or False
- Response level feedback and answer key

Link to File

Used to play zipped HTML files created outside of EthosCE

SCORM/Tin Can

Optional based on package

Webform

Can be used for course evaluations (non-graded rating questions)

**Templates Available*

Credit

Based on credits available in course

Certificate

Offered after completing requirements (order of course objects, optional or required, passing grades, etc.)

ALWAYS SAVE

- Course Completion Message

Course Shell

Main Foundation for your Site. This shell includes the title, description, credits, certificate mapping, target audience, objectives, start and end dates, cost of enrollments, and more!

- Program Description
 - **Course > Edit > Course Description**
 - Used in catalogs
 - Used for related courses
 - Should be a short summary of the course
- Dates
 - **Course > Edit > Course Description > Date & Time**
 - Enrollment window for enduring activity or for live events inside enduring activity.
 - Adding a time is **required** for EthosCE to make your course live
- Course Completion Message
 - **Course > Edit > Course Description > Course Format**
 - Displayed after the final course object is complete
 - Useful for promoting related courses
 - Clones over to new course
- Course Credit
 - **Course > Edit > Course Settings > Course Credit**
 - Under Course Settings
 - <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/5308425/Course+Credit>
- Certificate Settings
 - **Course > Edit > Course Settings > Certificate**
 - Global Settings for Certificate Mapping
 - Override at Course Level
 - Rules and Manual to be used for edge cases
 - <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/5308432/Certificate+Settings>
- Image Size
 - Important to make sure you are using the correct image size in each relative place, including
 - Course Image
 - Venue
 - Others

- Image Size Guidelines :

<https://ethosce.atlassian.net/wiki/spaces/ECE/pages/80351052/Image+Size+Guidelines>

Course Outline

Course > Course Outline

Your course outline is where most of your content lives in your course. Each piece of content is called a course object.

Objects can be reordered, but courseflow goes from top to bottom. You can also delete objects. Remember to **save your outline** whenever a change is made.

Course Objects

- Includes Quizzes, Media, Books, Surveys, Pages, etc.
- You can edit the instance or the settings.
- Make sure to *a*lways save your outline.

Adding a Course Object

- Course > Course Outline > Dropdown Menu > Add Objects
 - <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/5832739/Adding+a+Course+Object>

Object: Credit

- Automatically added when credit is enabled

Object: Certificate

- Manually Added

Object: Course Page

- Basic Page with text, etc.
 - Can be formatted
 - Can embed media
 - Can upload a file
- <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6258855/Course+Page>

Object: Quiz

- Quiz Shell - Name of Quiz, Delivery of Questions, Number of Attempts, Passing Grade, etc.
- Quiz Pages/Questions (Locked to editing while there are attempts on the quiz. To edit after someone has taken the quiz, you must delete the attempts.)

- Quiz Page - Can house multiple questions on one page. Otherwise, users must go through the quiz one question at a time.
 - <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6258909/Quiz+Page+multi-page+quiz>
- Long Answer Questions
- Short Answer Questions
- Matching
- Multiple Choice
- True or False
- Question Importer
 - You can bulk import questions and add correct and incorrect answers.
 - Question options are randomized
 - UUID must be added and used to bulk update questions in import

Object: Quiz Comparison

- Default setting is user versus peers
- <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6258925/Quiz+Peer+Comparison>

Object: Link to File

- Play zipped HTML files
- <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6258867/Link+to+a+File>

Object: SCORM/Tin Can

- Play SCORM or TinCan files
- Learner interaction and reporting depends on your package settings
- <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6258927/SCORM+TinCan>

Object: Book

- Collection of static pages in a hierarchy
- <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6258800/Adding+a+Book>

Object: Webform

- Can be used to add course evaluations and enrollment questions
 - Non-graded
 - Rating questions
 - Key/Value pair
 - Conditional Questions
 - Email submissions

- <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6258931/Adding+a+Webform>
[m](#)

Modifying Courses

Webform Templates

New > Webform Template

Webform templates allow for efficient use of the LMS. They standardize presentation and assist in compliance. Webform Templates are editable once used to create content and cloneable to make new template variations. The name is only displayed to admins.

- <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6258955/Webform+Templates?src=search>

Template Settings

- Confirmation message
- Submissions
- Progress bar
- Preview before submitting

Advanced settings

- Saving options
- Additional submission options

Webform Components

- Date
- Email
- Fieldset
- File
- Grid
- Hidden
- Markup
- Number
- Page break
- Select options
- Textarea

- Textfield
- Time

Best Practices

- Always use webform templates
- Be consistent in your rating scales.
- Use numbers as keys for rating questions
- Don't use numbers as keys for non-rating questions.
- Ensure that the question text contains all necessary information
- Use the same naming conventions, including style when adding speaker names.

Enrollment Questions

Manage > Admin > Course settings > Enrollment Types

- Collect and download responses
- Can be reused
- <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6259284/Enrollment+Questions>

Taxonomy

Taxonomy includes the terms you see in drop-down menus throughout the site.

- Question category
- Course format
- May be used for other custom profile/course fields
- Site admin can edit, remove, or add options
- <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/27066385/Managing+Taxonomy+Terms>

Certificates

Manage > Certificate Settings

EthosCE offers a list of preset certificate templates to choose from. The site admin can configure the text, logo and signature images, and border color. All certificates can be cloned!

- <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/5832708/Certificates>

Tokens

- Each template provides a list of suggested system tokens.
- Additional tokens are available in the “All Tokens” list.
- <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/80254814/Token+Descriptions>

Certificate Mapping

- Site admin can set a global default for certificate mapping that will affect all courses.
- Certificate mappings may be overridden per course
- <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/692322435/Global+Certificate+Mapping>

System Emails

Enrollment Confirmation Emails

Course > Enrollments > Settings

- There are global enrollment email settings
- Text is used for all new courses
- This can be overridden at course level
- Cloned courses retain original course content, not the global setting
- <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6259274/Enrollment+Confirmation+Email>

Reminder Emails

Course > Edit > Course Settings > Reminders

You can set reminder emails for:

- Before/After an action
- Completions or Inactivity
- Enrollment creation, start, or end
 - To personalize these emails, add tokens!
- <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/5308449/Reminders>

Enrollments

In each course, you can manually enroll users as well as manipulate a user's completion of the course.

- <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/80349692/Enrollments>

Waitlist

Course > Enrollments > Waitlist

- If course registration closes and no spaces are available, learners can add themselves to a waitlist. The course administrator may categorize the waitlisted learners by status, email the learners, or enroll the learners into the course manually.

- <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6259242/Course+Waitlist>

Course Record Importer

Course > Enrollments > Import

- The course record importer may be used to enroll a list of user records into a course. Records can include course completions or enrollments or both and are uploaded as a CSV file.
- Records are matched to users by email address. Records can be imported both for users with and without accounts in EthosCE.
- <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/7307367/Course-level+Course+Record+Importer>

Prerequisites

Course > Edit > Course Settings > Prerequisites

- Enrollment blocker to courses
- It's possible to require multiple courses as prerequisites
- You can add related courses as blockers
 - These are useful to prevent double claiming for live and then enduring built on the same content.
- <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/80744426/Course+Prerequisites>

Commerce

EthosCE provides a full-featured shopping cart for selling courses and course registrations online.

- <https://ethosce.atlassian.net/wiki/spaces/ECE/pages/6258759/Commerce>