

## Series B: Creating Courses

## Table of Contents

<b>Overview</b> .....	<b>3</b>
<b>Before You Use This Guide</b> .....	<b>3</b>
<b>Who Should Use This Guide</b> .....	<b>3</b>
<b>Contacts for Questions</b> .....	<b>3</b>
<b>Classroom Courses</b> .....	<b>4</b>
<b>Who Should Use This Section</b> .....	<b>4</b>
<b>Classroom Courses Overview</b> .....	<b>4</b>
<b>Admin Catalog</b> .....	<b>4</b>
<b>Add a Classroom Course</b> .....	<b>5</b>
<i>Basic Classroom Settings</i> .....	<i>6</i>
<i>Advanced Classroom Settings</i> .....	<i>7</i>
<i>Reminder Classroom Settings</i> .....	<i>8</i>
<b>Add a Class Session</b> .....	<b>9</b>
<b>Pre-Built Courses</b> .....	<b>14</b>
<b>Who Should Use This Section</b> .....	<b>14</b>
<b>Pre-Built Courses Overview</b> .....	<b>14</b>
<b>Add a Pre-Built Online Course</b> .....	<b>14</b>
<i>Basic Pre-Built Online Settings</i> .....	<i>14</i>
<i>Advanced Pre-Built Online Settings</i> .....	<i>17</i>
<i>Reminder Pre-Built Online Settings</i> .....	<i>18</i>
<b>Custom Online Courses</b> .....	<b>21</b>
<b>Who Should Use This Section</b> .....	<b>21</b>
<b>Custom Online Courses Overview</b> .....	<b>21</b>
<b>Add a Custom Online Course</b> .....	<b>21</b>
<i>Basic Custom Online Settings</i> .....	<i>21</i>
<i>Advanced Custom Online Settings</i> .....	<i>23</i>
<i>Reminder Custom Online Settings</i> .....	<i>25</i>
<b>Adding Content to Custom Online Courses</b> .....	<b>26</b>
<i>Adding Basic Content</i> .....	<i>26</i>
<i>Upload PDF</i> .....	<i>31</i>
<i>Upload a Video</i> .....	<i>34</i>
<i>Add a Question Group</i> .....	<i>35</i>
<i>Preview Course</i> .....	<i>41</i>

## Overview

The Learn (LE) application gives the HR Administrator the ability to create classroom, pre-built online and custom online courses. These courses are maintained in the Admin Catalog, which is a central place to manage all the course content in the system.

## Before You Use This Guide

NEOGOV must enable the Learn (LE) environment before you can configure the settings detailed in this guide. Contact your Implementation Consultant if your environment has not yet been activated.

## Who Should Use This Guide

This guide is intended for the Learn HR Administrators, HR Users, and any other users who have been granted permission to create courses. These users initially create courses and maintain these courses on an ongoing basis.

## Contacts for Questions

The following additional resources are available should you have any questions about Learn:

1. [NEOGOV Community](#): Requires NEOGOV product login ID and password for access
2. NEOGOV Customer Support: [customersupport@neogov.com](mailto:customersupport@neogov.com)
3. NEOGOV Customer Support: (877) 204-4442

## Classroom Courses

### Who Should Use This Section

This section is intended for Learn HR Administrators, HR Users, and any other users who have been granted permission to create and maintain Classroom Courses on an ongoing basis.

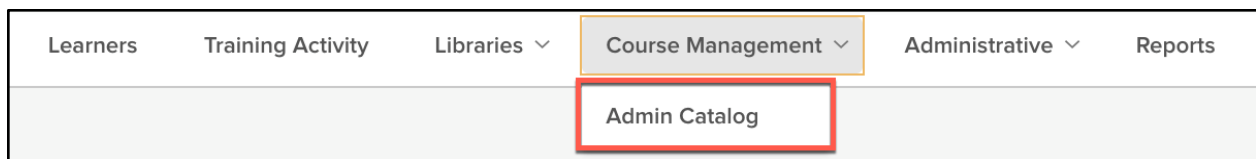
### Classroom Courses Overview

Classroom Courses are instructor-led courses that take place in a physical location. For example, CPR Training for the Parks and Recreation Department is an example of a Classroom Course.

By default, all HR Admins and HR Users have access to create Classroom Courses. If necessary, security settings can be configured per user role.

### Admin Catalog

Classroom Courses are created and maintained via the **Admin Catalog**. To access this page, select **Course Management > Admin Catalog** from the menu bar located at the top of the dashboard.



*Figure 1: Course Management > Admin Catalog*

The **Admin Catalog** mimics the **Course Catalog** your learners use to browse and enroll in courses. This similarity allows you a familiarity with the user experience while you're creating new courses.

Here's a brief rundown of the page layout:

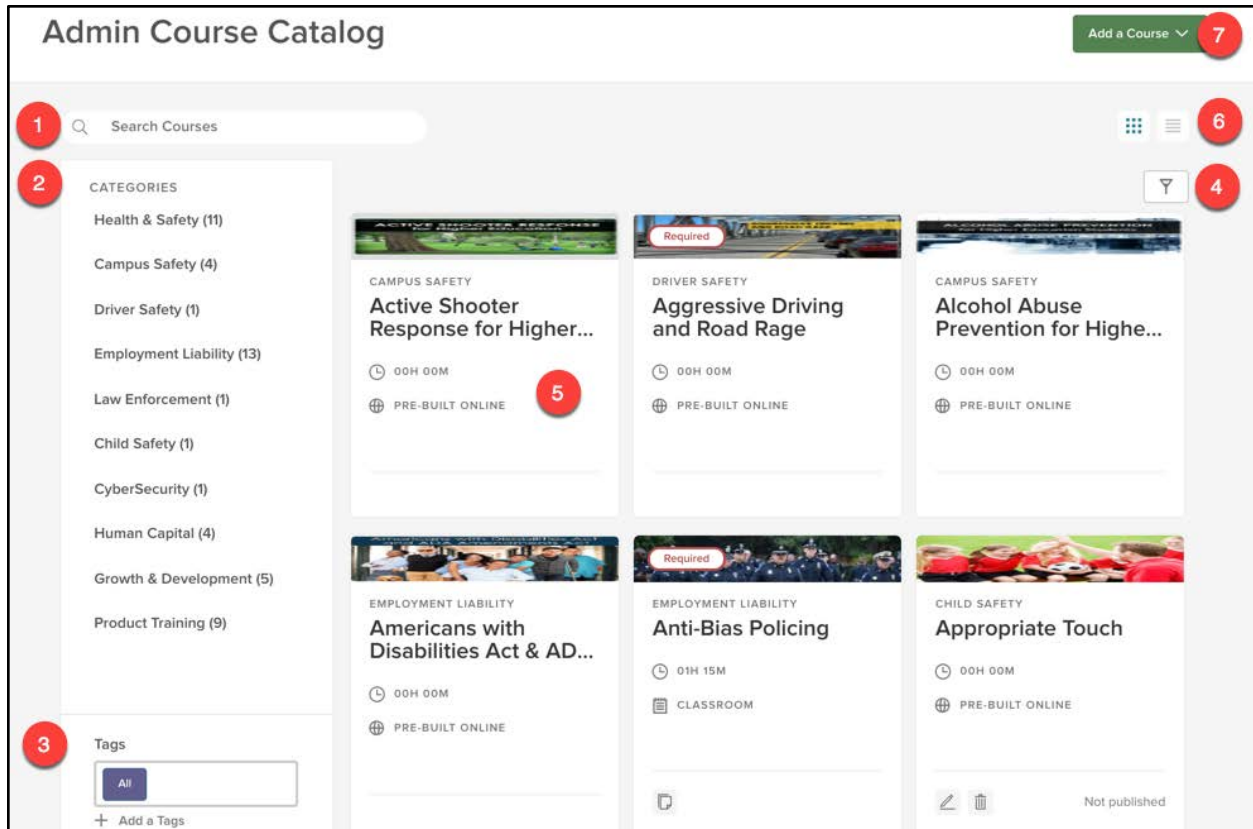


Figure 2: Admin Course Catalog

1. **Search Bar:** Type into this bar to look for a specific course title
2. **Categories Sidebar:** Narrow courses down by their associated category
3. **Tags:** Narrow courses down by associated tags or keywords
4. **Filters:** Limit the course view in the **Admin Catalog** with specific requirements
  - a. Filters available include: course name, course code, category, delivery method, type of course, number of classes (classroom only), duration, published, last updated by, last updated on, passing score, and approval required
  - b. Multiple filters can be active at once
5. **Course Card:** Bite-sized information about a particular course
6. **Catalog View:** Toggle the **Admin Catalog** view by either the default card view or list view
7. **Add a Course Button:** Create a Classroom, Pre-Built Online, or Custom Online course

Throughout this guide, we focus on the **Add a Course** Button. This is the central spot you navigate to in order to create all three types of courses: Classroom, Pre-Built Online, and Custom Online.

### Add a Classroom Course

To add a new Classroom Course, click on the green **Add a Course** button and select Classroom.

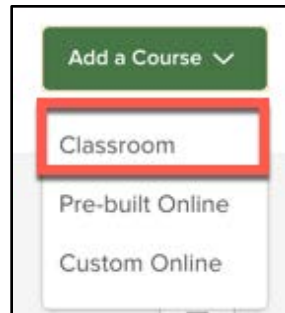


Figure 3: Add a Course > Classroom

## Basic Classroom Settings

To create a Classroom Course, there are only a select few fields to fill out – and only a couple are required. All required sections are indicated by a red Asterix (\*). This makes the process quick and easy.

Figure 4: Add a Classroom Course

1. **Course Name:** Enter an appropriate name
2. **Course Code:** Enter the applicable course code
  - a. If you do not currently use course codes, select any relevant combination of letters and/or numbers
  - b. Course codes must be unique
3. **Category:** Select an existing category from the list or use the + button to add a new category
  - a. Categories allow learners to easily find courses in the catalog by grouping similar courses by topic
  - b. Please note you only have the option to add a new category if you have been granted permission to do so

4. **Description:** Enter a description for the course
  - a. Adding a description gives learners a better idea of what this training offers
5. **Course Image:** Upload an image for the course
  - a. Appears on the top of the course card, making the catalog and course more inviting
  - b. Supported image types are jpg, svg, and png (Max Size: 5 MB)
6. **Duration:** Enter the duration of the course
  - a. If a duration is entered, it also displays on the course card
  - b. This feature lets your learners know how long the course is, helping them plan and schedule accordingly
7. **Is Required:** Allows you to deem the course as Required or Not Required
  - a. When turned on, a red Required label appears on the course card, allowing the learner to easily see the statuses of required courses
  - b. With this label, HR can easily track the course progress of mandatory training
8. **Pass Required:** Choose whether it's required for a learner to pass this course; if a passing score is not required for the course, leave the default as off
  - a. **Passing Score:** Enter a passing score percentage
    - i. This field becomes required when the **Pass Required** toggle is enabled
    - ii. When this field is used, learners are automatically marked with a "Not Completed" status if they do not achieve a passing score
9. **Self-Enrollment:** Choose whether a learner can enroll themselves in this classroom course
  - a. When enabled, learners can view upcoming classes and enroll directly on their own
  - b. Allowing self-enrollment reduces HR's responsibility of managing enrollment and aids in gaining employee trust by letting them choose what areas they want to train and develop in
  - c. For more information on enrolling in Classroom Courses, please view our Enrolling User Guide
10. **Enrollment Approval Required:** Adds a layer of approval to the enrollment process
  - a. If turned on, select the appropriate user role or specific employee responsible for approving enrollment
  - b. Using enrollment approvals can help you save time by ensuring learners only enroll in courses they belong in and gives managers more visibility to what training their employees take

## Advanced Classroom Settings

Underneath the basic classroom settings are some Advanced Settings you can configure. These are used to add a little extra structure to the class that makes it easier for a learner to find the course.

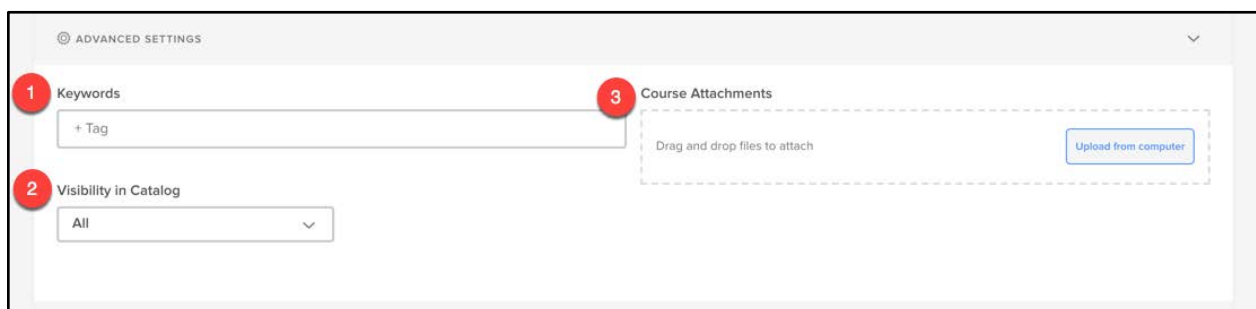


Figure 5: Advanced Classroom Settings

1. **Keywords/Tags:** Add specific words by typing in the word and hitting enter
  - a. We recommend using competencies as keywords, as they can help you designate courses to develop those skills and allow learners to search for those keywords as well
  - b. If you have NEOGOV's Perform module, you can pull in competencies by typing in the competency name and selecting the correct option that appears below
2. **Visibility in Catalog:** Control who has access to see this course in the catalog
  - a. By default, this is set to All
  - b. If necessary, select a specific department or departments if a course is only applicable to one or more departments
3. **Course Attachments:** Upload any attachments (if any) to be made available to your learners when accessing this course
  - a. For example, maybe there is a course syllabus the learner should print and bring to class
  - b. Supported file types are: jpg, svg, png, pdf, ppt, pptx, doc, docx, txt (Max Size: 10 MB)

### Reminder Classroom Settings

After the **Advanced Settings**, there is one more section available to configure when adding a new Classroom Course. This last section is the Reminder Settings.

REMINDER SETTINGS

Reminder Notices

OFF  ON

30 Days Before

2 Weeks Before

1 Week Before

Days Before

*Figure 6: Reminder Classroom Settings*

Here you can turn Reminder Notices on and choose the frequency of those reminders. When enabled, the system sends an email notification to the learner reminding them of their upcoming classroom course. The default Reminder Settings are controlled by your System Administrator.

Using reminder notices can help boost completion metrics and lower your no-show rate. For more information on these default settings, please view our Admin Settings User Guide.

Once all fields are configured as needed, click **Add this Course**. Once you save, you are taken to the course details page. Here, you can see all the details you were able to configure during the setup of the Classroom Course.



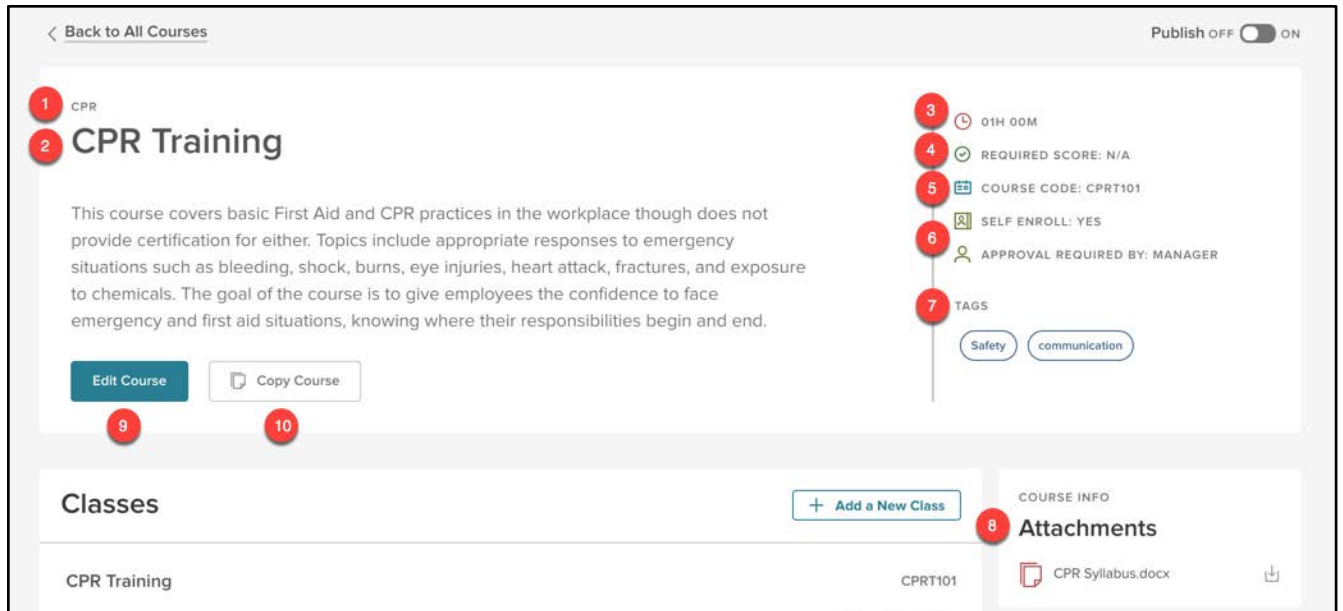


Figure 7: Course Details Page

1. The Course Category
2. Title of the Course
3. Duration
4. Required Score
5. Course Code
6. Whether Self-Enrollment is enabled and whether Approvals are Required and by whom
7. Any Tags or Keywords used
8. Any Attachments added

In addition to all the configurable details you added to the class, there are two additional buttons available. Prior to publishing this course, you can:

9. **Edit Course:** Make any edits to the above details; returns you to the Classroom Course settings
10. **Copy Course:** Duplicates the course as it currently exists

## Add a Class Session

Once your Classroom Course is created, the next step is to create your classes. Classes are the specific occurrences of the course. Since these courses occur at a specific location and time, it's necessary to create these timeslots before learners can enroll in the course.

From the Course Details Page you just created, click the **+ Add a New Class** button.

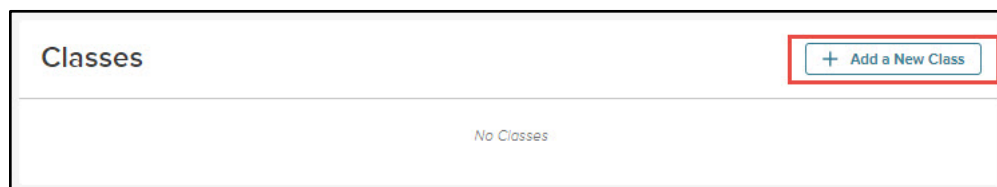


Figure 8: +Add a New Class

Notice how a number of the fields have been auto-filled for you. That's because each class created for a Classroom Course is associated to that course, and so the settings you enabled for the course are transferred over to the individual class.

Configure your class by filling out all required fields and additional settings as necessary. As before, all required sections are indicated by a red Asterix (\*).

The screenshot shows the 'Add a Class' form with the following fields and annotations:

- 1** Class name \*: CPR Training-2
- 2** Class code \*: CPRT101-2
- 3** Max Class Size: [Empty field]
- 4** Wait-List: OFF  ON
- 5** Self Enrollment: OFF  ON
- 6** Enrollment Approval Required: OFF  ON  Enrollment Approval \*: Manager
- 7** Enrollment Start Date: Select Date
- 8** Enrollment End Date: Select Date
- 9** Date \*: 06/18/2018
- 10** From: 11:00 AM
- 10** To: 01:00 PM
- 11** Instructor: Select one
- 12** Classroom Location: Select one

The bottom section shows a calendar for Monday, June 18, 2018, with a time slot from 11 AM to 12 PM highlighted in grey.

Figure 9: Add a Class

- 1. Class Name:** Auto-populated based on the course name; editable if needed
- 2. Class Code:** Auto-populated based on the course name; editable if needed
- 3. Max Class Size:** Controls how many learners can be enrolled in the class

- a. You cannot save the class if the max class size exceeds the classroom location capacity

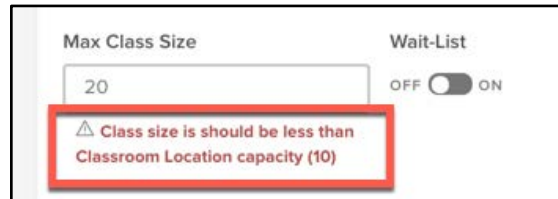


Figure 10: Classroom Location Capacity

4. **Wait-List:** Available if you have a max class size but want learners to be able to join if spots open
  - a. Using a waitlist allows you to save time by automatically enrolling learners when people drop the class or are unenrolled
5. **Self-Enrollment:** This field controls if the learner can enroll themselves in the course
6. **Enrollment Approval Required:** Adds a layer of approval to the enrollment process
  - a. If turned on, select the appropriate user role or specific employee responsible for approving enrollment
7. **Enrollment Start Date:** If there is a specific period you want enrollment for this class to be available, enter that start date here
8. **Enrollment End Date:** If there is a specific period you want enrollment for this class to be available, enter that end date here
9. **Date:** Enter the date of the class
10. **From/To:** Enter the time the class starts and ends
  - a. The system does not let you save the class if there are any overlaps with the instructor and/or classroom locations for the date and time you selected, preventing you from double booking



Figure 11: Classroom Events Overlap Error

11. **Instructor:** Select the instructor for the course (if applicable)
12. **Classroom Location:** Select a classroom location from the list or use the + button to add a new location
  - a. If adding a new classroom location, fill out all required fields and save



You can save a class without an Instructor and/or Location and keep it unpublished until those items are populated

This prevents learners from seeing the class prematurely in the catalog when important information is still missing

Once the class is configured to your liking, hit **Save**. Repeat this process as many times as you need to create multiple classes for this classroom course.

Your newly created class appears below in the Classes section. Here, there are three icons associated with the class: The View Icon, the Edit Icon, and the Trash Icon.

Select the Trash Icon to delete the class, and the Edit Icon to go back to the settings for this class. The View Icon takes you into the Class Details page.



Figure 12: Class Icon Options



You can only edit a course or class if it's unpublished

On the **Class Details Page** you can see further details about the class. Once ready, click the Publish button in the upper right-hand corner.

Back to CPR Training Publish OFF  ON

CPRT101-2  
**CPR Training-2**  
[Edit Class](#)

Enrolled: 0  
Pending: 0  
Waitlist: 0

01H 00M  
REQUIRED SCORE: N/A  
CLASS CODE: CPRT101-2  
MAX CLASS SIZE: 5  
SELF ENROLL: YES  
APPROVAL REQUIRED BY: MANAGER

TAGS: Safety, communication

### Learner List

Enrolled | Pending | Waitlist

First Name	Last Name	Position	Due Date	Score	Status	Attendance	Actions
No records available.							

Showing 0 - 0 of 0 items

### Information

	DATE	INSTRUCTOR	ENROLLMENT
1	Jul 10, 2018 09:00 AM - 10:00 AM	NEOGOV El Segundo Offices	

Figure 13: Publish Class Toggle

Publishing the class, in turn, publishes the Classroom Course, making it viewable in the course catalog and available for enrollment.

**NOTE:** Classroom courses must have at least one published class in order to be published. Classes can only be published if the class date is today’s date or in the future. You can unpublish the class at any time if needed. You can also unpublish the course if no classes are published.

To spot check your work, go to the Course Catalog and search for the classroom course you have just created. You have now successfully created a classroom course!

## Pre-Built Courses

### Who Should Use This Section

This guide is intended for the Learn HR Administrators, HR Users, and any other users who have been granted permission to create and maintain Pre-Built Courses on an ongoing basis.

### Pre-Built Courses Overview

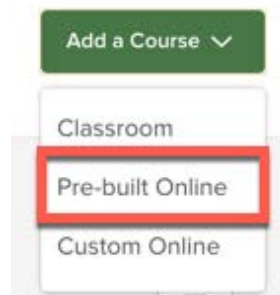
A Pre-Built Online Course is a course with SCORM content that your organization purchased from another vendor or created internally with software like Adobe Captivate or Articulate Storyline.

Pre-Built Online Courses are created and maintained via the **Admin Catalog**. To access this page, select **Course Management > Admin Catalog** from the menu bar located at the top of the dashboard.

For more information about this page layout, please see [Admin Catalog](#).

### Add a Pre-Built Online Course

To add a new Pre-Built Online Course, click on the green **Add a Course** button and select Pre-Built Online.



*Figure 14: Add a Course > Pre-Built Online*

### Basic Pre-Built Online Settings

To create a Pre-Built Online Course, there are only a select few fields to fill out – and only a couple are required. All required sections are indicated by a red Asterix (\*). This makes the process quick and easy.

The screenshot shows a form titled "Add a Pre-built Online Course" with a "Cancel" button and an "Add this course" button. The form contains the following fields and options, each marked with a red circle and a number:

- 1 Course Name \***: Text input field.
- 2 Course Code \***: Text input field.
- 3 Course Category \***: Dropdown menu with "Select one" and a downward arrow.
- 4 Description**: Large text area for entering text.
- 5 Course Image**: File upload area with "Drag and drop files to attach" and an "Upload from computer" button.
- 6 Duration**: Dropdown menu with "00h 00m" and a downward arrow.
- 7 SCORM Zip file \***: File upload area with "Drag and drop files to attach" and an "Upload from computer" button.
- 8 Is Required**: Toggle switch currently set to "OFF".
- 9 Relative Due Date**: Text input field and a "Days" dropdown menu.
- 10 Recurring Enrollment**: Toggle switch currently set to "OFF", with "Every" and "1" and "Months" dropdown.
- 11 Gated**: Toggle switch currently set to "OFF".
- 12 Pass Required**: Toggle switch currently set to "OFF", with "Passing Score" and "80" and "%".
- 13 Self Enrollment**: Toggle switch currently set to "OFF".
- 14 Enrollment Approval Required**: Toggle switch currently set to "OFF", with "Enrollment Approval" and "Select one" dropdown.

\* fields are required

Figure 15: Add a Pre-Built Online Course

1. **Course Name:** Enter an appropriate name
2. **Course Code:** Enter the applicable course code
  - a. If you do not currently use course codes, select any relevant combination of letters and/or numbers
  - b. Course codes must be unique
3. **Category:** Select an existing category from the list or, use the + button to add a new category
  - a. Categories allow learners to easily find courses in the catalog by grouping similar courses by topic
  - b. Please note that you only have the option to add a new category if you have been granted permission to do so
4. **Description:** Enter a description for the course
  - a. Adding a description gives learners a better idea of what this training offers
5. **Course Image:** Upload an image for the course
  - a. Appears on the top of the course card, making the catalog and course more inviting
  - b. Supported image types are jpg, svg, and png (Max Size: 5 MB)
6. **Duration:** Enter the duration of the course
  - a. If a duration is entered, it also displays on the course card
  - b. This feature lets your learners know how long the course is, helping them plan and schedule accordingly

7. **SCORM Zip File:** Where you upload your SCORM content; this is the most distinctive difference between a Pre-Built Online Course and a Custom Online Course
  - a. Drag and drop the file or use the upload from computer option
  - b. The maximum file size is 100 MB, and the supported type is a zip file
8. **Is Required:** Allows you to deem the course as Required or Not Required
  - a. When turned on, a red Required label appears on the course card, allowing the learner to easily see the statuses of required courses
  - b. With this label, HR can easily track the course progress of mandatory training
9. **Relative Due Date:** Dictate a number of days/weeks/months after enrollment the course should be completed by
  - a. Use if you have a due date for the course; if this date passes and the learner has not completed the course, it is marked as overdue
  - b. For example, if you enroll the learner today and enter 4 weeks in this field, the course shows as 'Overdue' if uncompleted in 4 weeks; this allows the learner to easily see where they are falling behind
  - c. Please note that this field is required if a course is marked Required or Recurring Enrollment is enabled
10. **Recurring Enrollment:** Allow the system to re-enroll employees automatically after the designated period
  - a. This feature is a big timesaver for HR and Managers
11. **Gated:** Requires the learner to go through the course sequentially
  - a. Helps ensure your learners take the time to review and learn the content rather than skipping through it
  - b. Gated settings in a course are controlled when authoring the SCORM file
    - i. The setting selected here is informational and does not override the setting configured in the Pre-Built course
12. **Pass Required:** Choose whether it's required for a learner to pass this course; if a passing score is not required for the course, leave the default as off
  - a. **Passing Score:** Enter a passing score percentage
    - i. This field becomes required when the **Pass Required** toggle is enabled
    - ii. When this field is used, learners are automatically marked with the "Not Completed" status if they do not receive a passing score or above
    - iii. Passing score is also configured when authoring the SCORM file; the value entered in Learn is informational and provides more details to learners browsing the catalog
13. **Self-Enrollment:** Choose whether a learner can enroll themselves in this pre-built online course
  - a. When enabled, learners can view upcoming classes and enroll directly on their own
  - b. Allowing self-enrollment reduces HR's responsibility of managing enrollment and aids in garnering employee trust by letting them choose what areas they want to train and develop in
14. **Enrollment Approval Required:** Adds a layer of approval to the enrollment process
  - a. If turned on, select the appropriate user role or specific employee responsible for approving enrollment
  - b. Using enrollment approvals can help you save time by ensuring learners only enroll in courses they belong in and gives managers more visibility to what training their employees take



## Advanced Pre-Built Online Settings

Underneath the basic pre-built online settings are some Advanced Settings you can configure. These are used to add a little extra structure to the class that makes it easier for a learner to find the course.

Figure 16: Advanced Pre-Built Online Settings

1. **Keywords/Tags:** Add specific words by typing in the word and hitting enter
  - a. We recommend using competencies as keywords, as they can help you designate courses to develop those skills and allow learners to search for those keywords as well
  - b. If you have NEOGOV's Perform module, you can pull in competencies by typing in the competency name and selecting the correct option that appears below
2. **Course Attachments:** Upload any attachments (if any) to be made available to your learners when accessing this course
  - a. For example, maybe there is a course syllabus the learner should print and bring to class
  - b. Supported file types are: jpg, svg, png, pdf, ppt, pptx, doc, docx, txt (Max Size: 10 MB)
3. **Visibility in Catalog:** Control who has access to see this course in the catalog
  - a. By default, this is set to All
  - b. If necessary, select a specific department or departments if a course is only applicable to one or more departments
4. **Enrollment Start and End Date:** Set a specific period of time for enrollment to be available
5. **Expiration Date:** Controls when an enrolled learner's access to the course content is cut off
  - a. This allows HR to enforce a strict deadline and see who is not compliant
6. **Allow Retakes:** Enable if retakes are allowed for this course; enter a numerical value for the maximum number of attempts allowed
  - a. Please note that retakes are only applicable for learners who do not pass the assessment associated with the course
  - b. This saves HR time by not having to re-enroll Learners in the course themselves
  - c. If enabled, Pass Required is enabled by default
7. **View Completed Course:** Controls the learner's ability to view the completed course
  - a. To prevent your learners from seeing course content once completed, turn this field off

## Reminder Pre-Built Online Settings

After the **Advanced Settings**, there is one more section available to configure when adding a new Pre-Built Online Course. This last section is the Reminder Settings.

*Figure 17: Reminder Pre-Built Online Settings*

1. **Reminder Notices:** Turn Reminder Notices on and choose the frequency of those reminders
  - a. If enabled, the system sends an email notification to the learner reminding them of their upcoming due date for an online course
    - i. Default Reminder Settings are controlled by your System Administrator
  - b. Using reminder notices helps boost completion rates
  - c. For more information on these default settings, please view our Admin Settings User Guide
2. **Overdue Notices:** Turn Overdue Notices on and choose the frequency of those reminders
  - a. If enabled, the system sends an email notification to the learner informing them their course is overdue
    - i. Notices are sent at the frequency selected based on the set Relative Due Date
  - b. Overdue notifications help ensure learners complete required training in a timely manner

Once all fields are configured as needed, click Save this Course. Once you save, you are taken to the course details page. A confirmation message appears to confirm your Pre-Built Course has been created.



*Figure 18: Pre-Built Course Confirmation*

Here, you can see all the details you were able to configure during the setup of the Pre-Built Online Course.

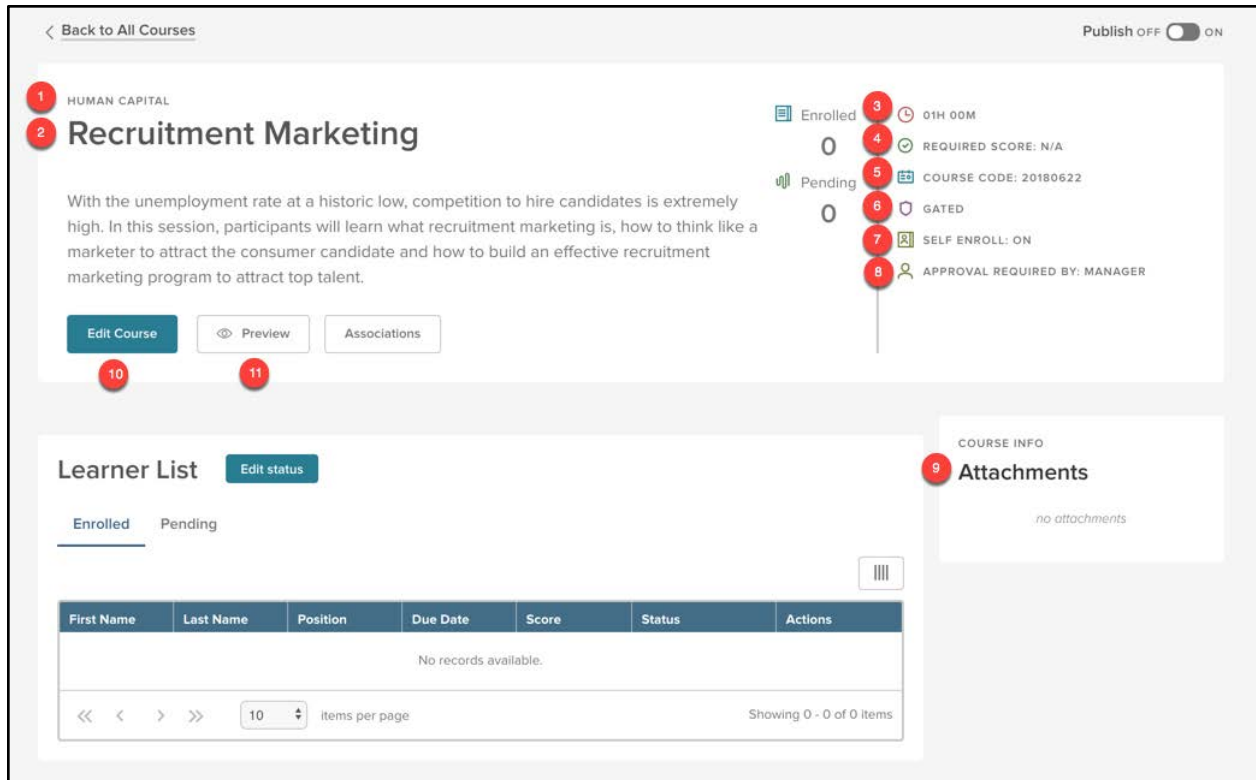


Figure 19: Pre-Built Course Page

1. Course Category
2. Title of the Course
3. Duration
4. Required Score
5. Course Code
6. If the Course is Gated or not
7. If Self-Enrollment is Allowed
8. Whether Approvals are Required and by whom
9. Any Attachments added

In addition to all the configurable details you added to the class, there are additional buttons available. Prior to publishing this course, you can:

10. **Edit Course:** You can make any edits to the course by clicking Edit Course



You can only edit a course if it's unpublished

11. **Preview:** View how the course appears to learners
  - a. Previewing the course helps you ensure you've uploaded the right file and the correct course launches successfully



You may need to disable pop-up blockers to view the Course Preview

Pop-up blockers are typically disabled from your browser toolbar

If everything looks good, the last step is to publish the course. This makes the course viewable in the course catalog and enrollment can begin.

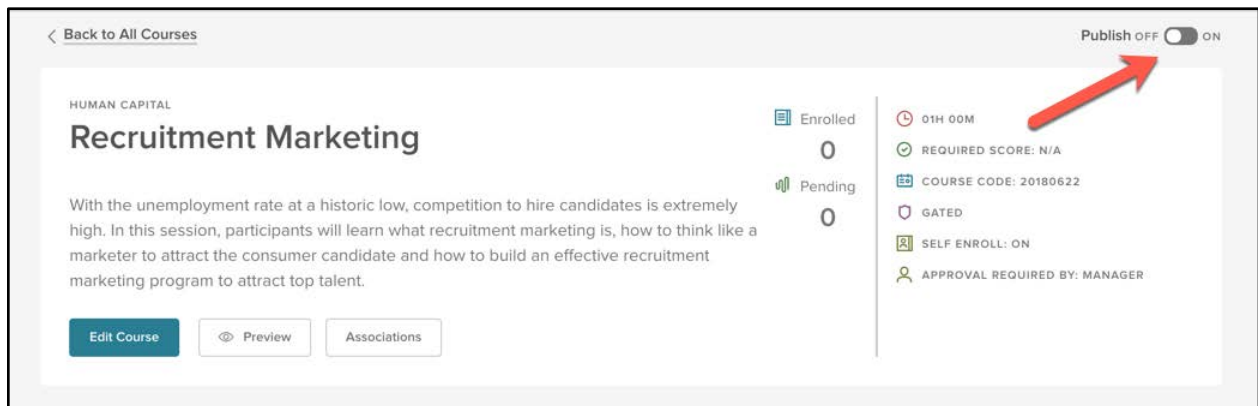


Figure 20: Publish Toggle

To spot check your work, go to the Course Catalog and search for the course you created. You have now successfully created a Pre-Built Online Course.

## Custom Online Courses

### Who Should Use This Section

This section is intended for Learn HR Administrators, HR Users, and any other users who have been granted permission to create and maintain Custom Online Courses on an ongoing basis.

### Custom Online Courses Overview

A Custom Online Course is a course that you, the user, author and manage within the system. By using PDFs, videos, images, attachments, links, quizzes, etc. you can quickly configure Custom Online courses through an easy to use, intuitive course builder tool. Once the course has been configured, you can preview the course prior to enrolling learners.

Please note, unlike course authoring software such as Articulate or Captivate, Custom Online Courses created in Learn cannot be published in SCORM format.

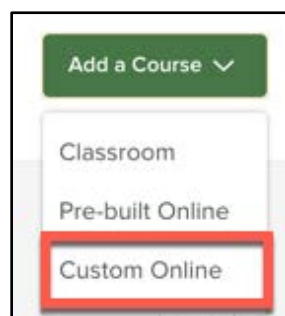
For more information on using SCORM courses within LE, please see [Pre-Built Courses](#).

Pre-Built Online Courses are created and maintained via the **Admin Catalog**. To access this page, select **Course Management > Admin Catalog** from the menu bar located at the top of the dashboard.

For more information about this page layout, please see [Admin Catalog](#).

### Add a Custom Online Course

To add a new Custom Online Course, click on the green **Add a Course** button and select Custom Online.



*Figure 21: Add a Course > Custom Online*

### Basic Custom Online Settings

To create a Custom Online Course, there are only a select few fields to fill out – and only a couple are required. All required sections are indicated by a red Asterix (\*). This makes the process quick and easy.

As an example, let's review how to build a Custom Online Course on how to create background forms in our Onboard product. This course would be great for any staff members assisting in building new hire forms in Onboard.

Figure 22: Add a Custom Online Course

1. **Course Name:** Enter an appropriate name
2. **Course Code:** Enter the applicable course code
  - a. If you do not currently use course codes, select any relevant combination of letters and/or numbers
  - b. Course codes must be unique
3. **Category:** Select an existing category from the list, or use the + button to add a new category
  - a. Categories allow learners to easily find courses in the catalog by grouping similar courses by topic
  - b. Please note that you only have the option to add a new category if you have been granted permission to do so
4. **Description:** Enter a description for the course
  - a. Adding a description gives learners a better idea of what this training offers
5. **Course Image:** Upload an image for the course
  - a. Appears on the top of the course card, making the catalog and course more inviting
  - b. Supported image types are jpg, svg, and png (Max Size: 5 MB)
6. **Duration:** Enter the duration of the course
  - a. If a duration is entered, it also displays on the course card
  - b. This feature lets your learners know how long the course is, helping them plan and schedule accordingly
7. **Is Required:** Allows you to deem the course as Required or Not Required
  - a. When turned on, a red Required label appears on the course card, allowing the learner to easily see the statuses of required courses

- b. With this label, HR can easily track the course progress of mandatory training
- 8. **Relative Due Date:** Dictate a number of days/weeks/months after enrollment the course should be completed by
  - a. Use if you have a due date for the course; if this date passes and the learner has not completed the course, it is marked as overdue
  - b. Please note that this field is required if a course is marked Required or Recurring Enrollment is enabled
- 9. **Gated:** Requires the learner to go through the course sequentially
  - a. Helps ensure your learners take the time to review and learn the content rather than skipping through it
- 10. **Pass Required:** Choose whether it's required for a learner to pass this course; if a passing score is not required for the course, leave the default as off
  - a. **Passing Score:** Enter a passing score percentage
    - i. This field becomes required when the **Pass Required** toggle is enabled
    - ii. When this field is used, learners are automatically marked with the "Not Completed" status if they do not receive a passing score or above
- 11. **Self-Enrollment:** Choose whether a learner can enroll themselves in this custom online course
  - a. When enabled, learners can view upcoming classes and enroll directly on their own
  - b. Allowing self-enrollment reduces HR's responsibility of managing enrollment and aids in garnering employee trust by letting them choose what areas they want to train and develop in
- 12. **Enrollment Approval Required:** Adds a layer of approval to the enrollment process
  - a. If turned on, select the appropriate user role or specific employee responsible for approving enrollment
  - b. Using enrollment approvals can help you save time by ensuring learners only enroll in courses they belong in and gives managers more visibility to what training their employees take
- 13. **Recurring Enrollment:** Allow the course to be taken on a recurring basis by the enrolled learners
  - a. Set the frequency by entering a number then choosing Months/Years
  - b. This helps ensure learners are automatically enrolled in the course again after the specified time period, reducing the strain for HR to manage and track

### Advanced Custom Online Settings

Underneath the basic custom online settings are some valuable Advanced Settings you can configure. These are used to add a little extra structure to the class that makes it easier for a learner to find the course.

Figure 23: Advanced Custom Online Settings

1. **Keywords/Tags:** Add any specific words by typing in the word and hitting enter
  - a. We recommend using competencies as keywords, as they can help you designate courses to develop those skills and allow learners to search for those keywords as well
  - b. If you have NEOGOV's Perform module, you can pull in competencies by typing in the competency name and selecting the correct option that appears below
2. **Course Attachments:** Upload any attachments (if any) to be made available to your learners when accessing this course
  - a. For example, maybe there is a course syllabus the learner should print and bring to class
  - b. Supported file types are: jpg, svg, png, pdf, ppt, pptx, doc, docx, txt (Max Size: 10 MB)
3. **Visibility in Catalog:** Control who has access to see this course in the catalog
  - a. By default, this is set to All
  - b. If necessary, select a specific department or departments if a course is only applicable to one or more departments
4. **Enrollment Start Date:** Select a specific date the course enrollment should open (if necessary)
  - a. Applicable to all users and allows HR to have more control over the enrollment process to ensure it is taking place at the right time
5. **Enrollment End Date:** Select a specific date the course enrollment should no longer be available
  - a. Applicable to all users and allows HR to have more control over the enrollment process to ensure it is taking place at the right time
6. **Content minimum time:** Dictate the minimum amount of time (using minutes and seconds) the learner must stay on the page
  - a. The course content is built as individual pages that the learner can navigate through
  - b. Configure the timing here applies the value to each page you add to the course, which can also be changed at that point if necessary
  - c. This helps HR ensure learners are spending an appropriate amount of time on each page of the course, ultimately helping them absorb more knowledge
7. **Expiration Date:** Control when learners' access to the course content is removed



- a. This cutoff activates regardless if a learner has finished the course or not
- b. HR can enforce strict cut off dates to easily identify who may be out of compliance
- 8. **Allow Retakes:** Enable if retakes are allowed for this course; enter a numerical value for the maximum number of attempts allowed
  - a. Please note that retakes are only applicable for learners who do not pass the assessment associated with the course
  - b. This saves HR time by not having to re-enroll Learners in the course themselves
  - c. If enabled, Pass Required is enabled by default
- 9. **View Completed Course:** Controls the learner's ability to view the completed course
  - a. To prevent your learners from seeing course content once completed, turn this field off

## Reminder Custom Online Settings

After the **Advanced** Settings, there is one more section available to configure when adding a new Custom Online Course. This last section is the Reminder Settings, which sends email notifications to enrolled learners to remind them of upcoming or past deadlines.

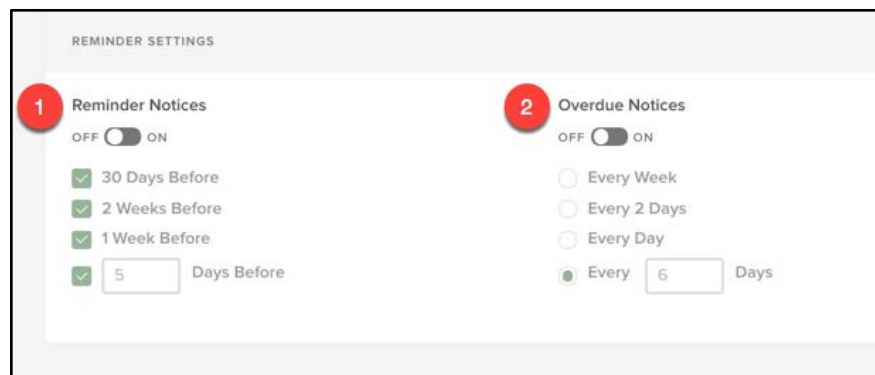


Figure 24: Reminder Custom Online Settings

1. **Reminder Notices:** Turn Reminder Notices on and choose the frequency of those reminders
  - a. If enabled, the system sends an email notification to the learner reminding them of their upcoming due date for an online course
    - i. Default Reminder Settings are controlled by your System Administrator
  - b. Using reminder notices helps boost completion rates
  - c. For more information on these default settings, view our Admin Settings User Guide
2. **Overdue Notices:** Turn Overdue Notices on and choose the frequency of those reminders
  - a. If enabled, the system sends an email notification to the learner informing them their course is overdue
    - i. Notices are sent at the frequency selected based on the set Relative Due Date
  - b. Helps ensure learners complete required training in a timely manner

**NOTE:** Reminder and Overdue Notices only send if there is a configured Relative Due Date.

After you have configured all the details for your Custom Online Course, be sure to select **Add this Course** at the top of the page.



Figure 25: Add This Course

Once the course has been added, you are taken into the Course Details page for the newly created Custom Online Course. This is where you can start adding content to the course.

### Adding Content to Custom Online Courses

Using the course builder, course creators can quickly and easily author courses, preview them, and ensure they are ready for the learners without sacrificing too much time.



You can only edit or add content to a course if it's unpublished

### Adding Basic Content

The Course Details page is where several actions can be taken regarding configuring the course, enrolling learners, reviewing course details, etc.

Back to All Courses Publish OFF  ON

ONBOARD

## How to build Background Forms in Onboard

This course will review how to build and configure Background Forms within Onboard. Onboard is another product from NEOGOV that allows us to facilitate our onboarding processes electronically online. A key component of Onboard is building forms and this course will train you on how to build Background Forms, which is one of the two types of forms you can build in Onboard.

Enrolled: 0  
Pending: 0

REQUIRED SCORE: N/A  
COURSE CODE: ON-BF-01  
SELF ENROLL: OFF  
NO APPROVAL REQUIRED

TAGS: Form Building, Attention to Detail, Background Forms, Accuracy

Edit Course Copy Course Preview Associations

### Learner List Edit status

Enrolled Pending

First Name	Last Name	Position	Due Date	Score	Status	Actions
No records available.						

Showing 0 - 0 of 0 items

### Course Content + Add/Edit Content

Untitled Chapter  
0 Pages 0 Question Groups 00h 00m

COURSE INFO  
Attachments  
no attachments

Figure 26: Custom Online Course Details Page

Most importantly, it is also where content can be added to the course. Scroll to the Course Content section at the bottom of the page for a view of the current content of this course.



Figure 27: Course Content

1. **+ Add/Edit Content:** Opens the Edit Course Content Page, where all your course content and quizzes are configured
2. **Chapter:** Custom Online Courses are built out using Chapters, which is a nice way to keep the course content organized in different sections, or “Chapters”
  - a. Every new course comes with a default chapter which can be configured within the Edit Course Content page
3. **Eye Icon:** Quickly preview the course from that chapter
4. **Edit Icon:** Edit the course content from that chapter

Select **+ Add/Edit Content** to pull open the Edit Course Content Page.

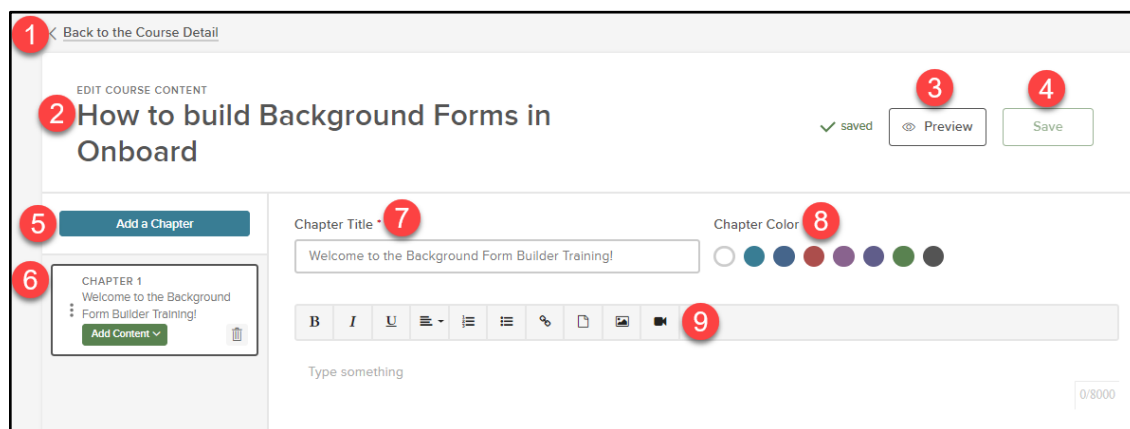


Figure 28: Edit Course Content Page

1. **Back to the Course Detail:** Returns to the Course Detail page (can be used at any time)
2. **Chapter Title:** Enter an appropriate name
3. **Preview:** View how the course looks from a learner’s perspective (can be used at any time)
  - a. Allows the course creator to quickly review the course and ensure it is ready for learners
  - b. The course can be previewed from the perspective of a desktop/laptop or tablet
4. **Save:** As you add content to the course, the system auto-saves your progress
  - a. If the course cannot be fully built in one session, rest assured your progress is saved
5. **Add a Chapter:** Allows the course creator to add a new chapter to the column below
  - a. A best practice could be having different content or topics built into different chapters
  - b. For example, one chapter contains documentation to review, another to watch any videos, another to take the quiz, etc.
6. **Chapter:** The main chapter slide
  - a. Configurable and contains the very important Add Content button (see [Figure 34](#))

7. **Chapter Title:** Name the chapter to clearly identify what it covers or its purpose
  - a. This title populates on the chapter page on the left
8. **Chapter Color:** Assign the chapter a color
  - a. This helps make the course more vibrant and inviting for the learners
  - b. Learners also better understand the context of where they are in the course if different chapter colors are used
9. **Rich Text Editor:** Configurable options for content and text in the below text box
  - a. We review this process below in more detail (see [Figure 29](#) and [Figure 33](#))

Let's use the first chapter as a Welcome page and review how to insert text and an image. For text, simply place the cursor in the text box and type out the necessary message. Be sure to use the Rich Text Editor to attractively format the text.

*Figure 29: Chapter Rich Text Editor*

For images, place the cursor in a new line and the + icon for the Quick Insert tool bar appears. Please note, the + icon does not appear unless the cursor is on the line you are inserting an image into. Click on the Quick Insert icon.



You can also insert an image by clicking on the image icon on the toolbar

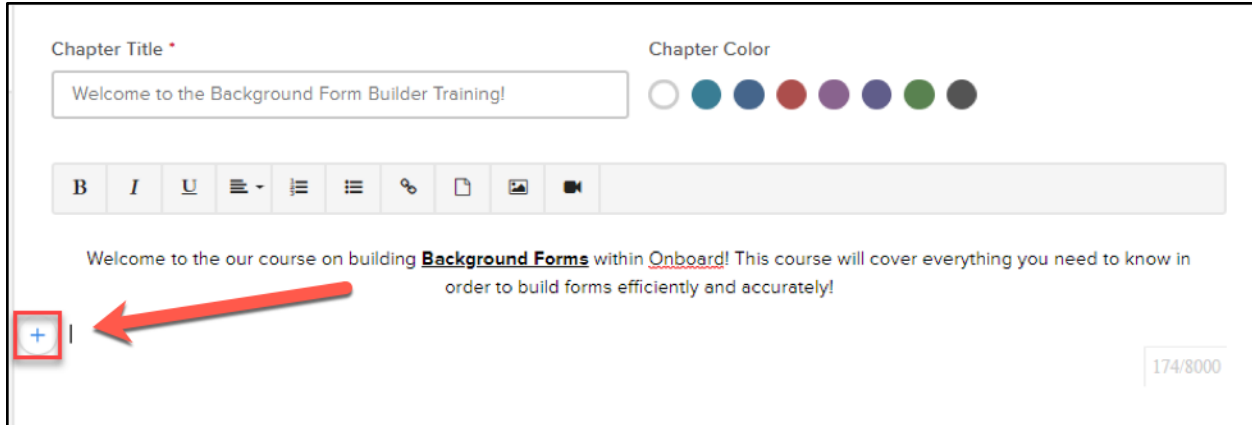


Figure 30: + Quick Insert Icon

Select the Insert Image icon and search for the image on your computer. Once you have chosen the image, it is added to the text box.

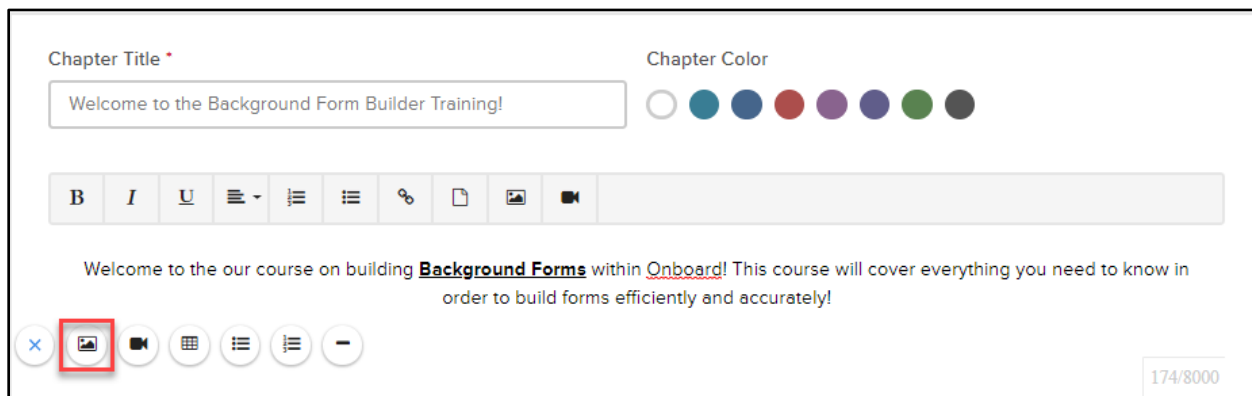


Figure 31: Insert Image Icon

Once the image has been added, easily resize or set its alignment. Just like that, the Welcome page is configured and ready to go!

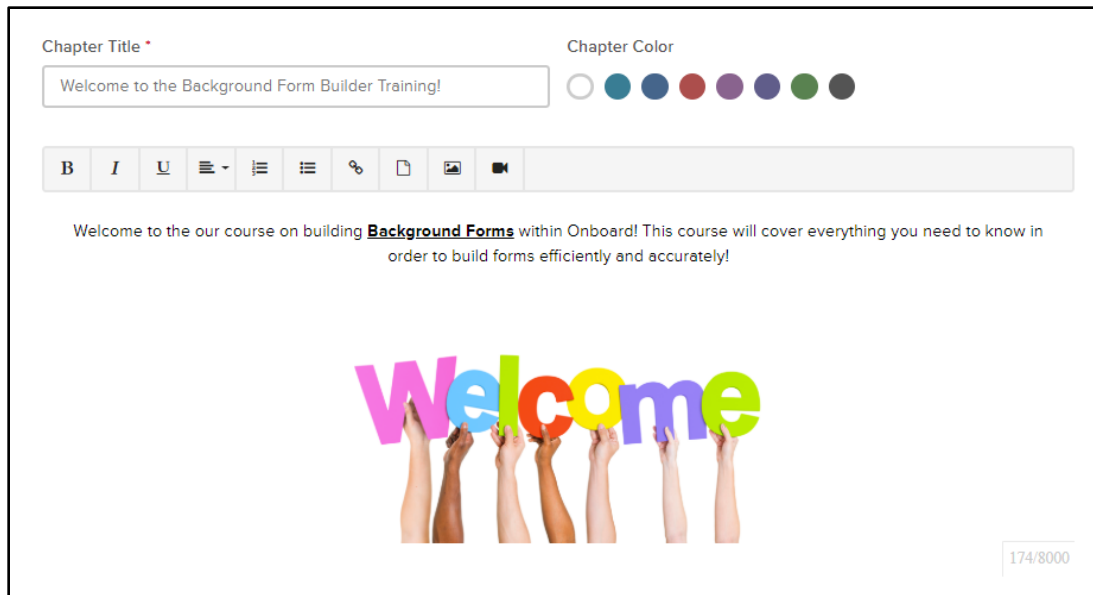


Figure 32: Example Welcome Page

Before we proceed, please note that additional content like attachments or hyperlinks can also be added to the pages from the Rich Text Editor.

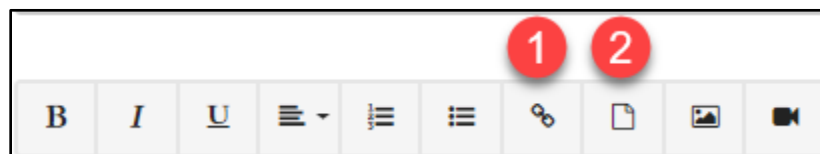


Figure 33: Rich Text Editor Additional Content

1. **Insert Link:** Add a clickable hyperlink to the page
  - a. Gives options for a URL to be entered along with Text for the URL to appear as
  - b. This allows your learners to have easy access to different web pages that might be beneficial to them while taking the course



When adding links, we recommend selecting the “Open in New Tab” option for the best user experience

2. **Upload File:** Add attachments to the page for the learners to download while taking the course
  - a. Select the Upload File icon and either drag and drop the file or browse for it on your computer
  - b. This is a great way to provide learners with supplemental information to assist them in successfully completing the course

## Upload PDF

Another feature available to you when adding content to courses is via PDF. To access this feature, select the Add Content drop-down within the second chapter. We recommend first naming the chapter and inputting any additional information to the main page before doing so.

Before we upload a PDF, let's review some of the options in the Add Content drop-down.

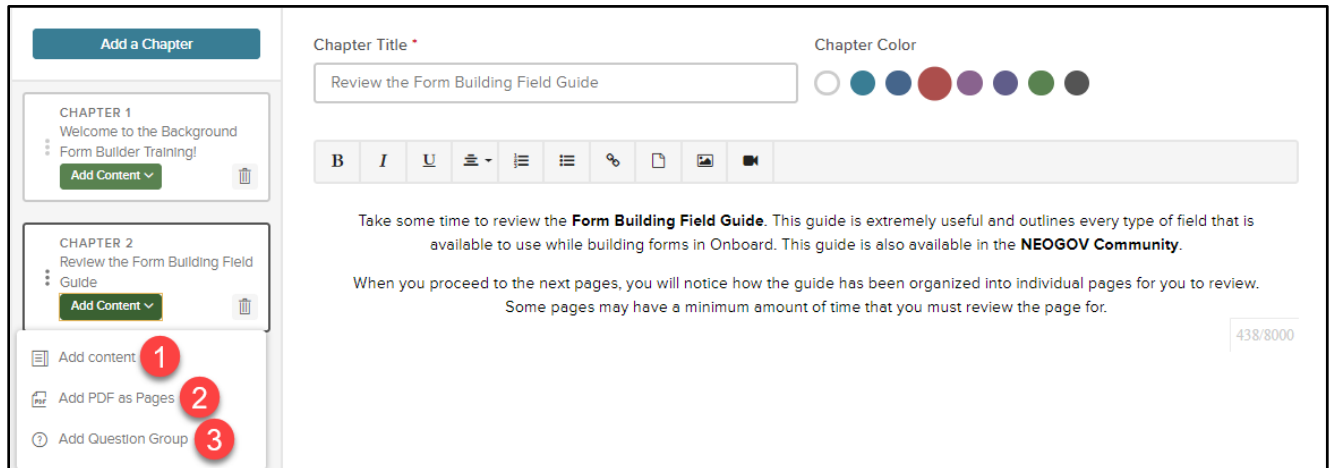


Figure 34: Add Content Dropdown

1. **Add Content:** Add a blank page to your chapter where videos, links, attachments, images, etc. can be added
2. **Add PDF as Pages:** Parses out an uploaded PDF into individual pages within a chapter
  - a. Useful if you have any training material that the learner should read through and review as a part of their course training
  - b. Uploading this information in just a few clicks saves your course creators valuable time



A PowerPoint presentation can also be uploaded if it's converted into a PDF

3. **Add Question Group:** Adds question or quiz functionality to the course
  - a. This allows the course creator to configure any scored or unscored questions for the learner to answer and can be inserted anywhere within the course
  - b. The system auto-scores the quiz once the learner has completed the course, which saves time for administrators



Any file content added to course content has a max file size of 100 MB

Now that the options have been reviewed, lets proceed by uploading a PDF document to the course.

Select Add Content > Add PDF as Pages.

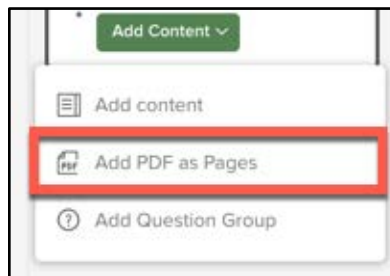


Figure 35: Add Content > Add PDF as Pages

This opens a flyout where the PDF can be dragged and dropped, or simply browse for it on your computer by selecting Upload from computer.

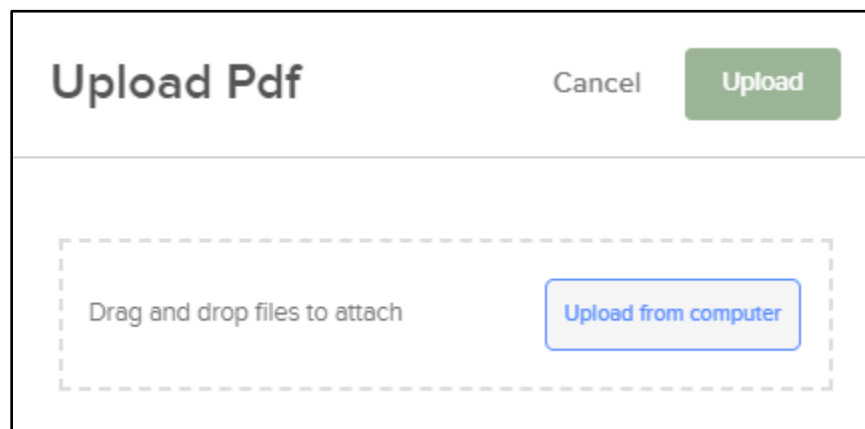


Figure 36: Upload PDF Flyout

Let's upload this document about the Form Builder in Onboard. Once the PDF has been selected, the system displays how many pages the PDF has been parsed into. Select Upload and the PDF is added as individual pages within the chapter.



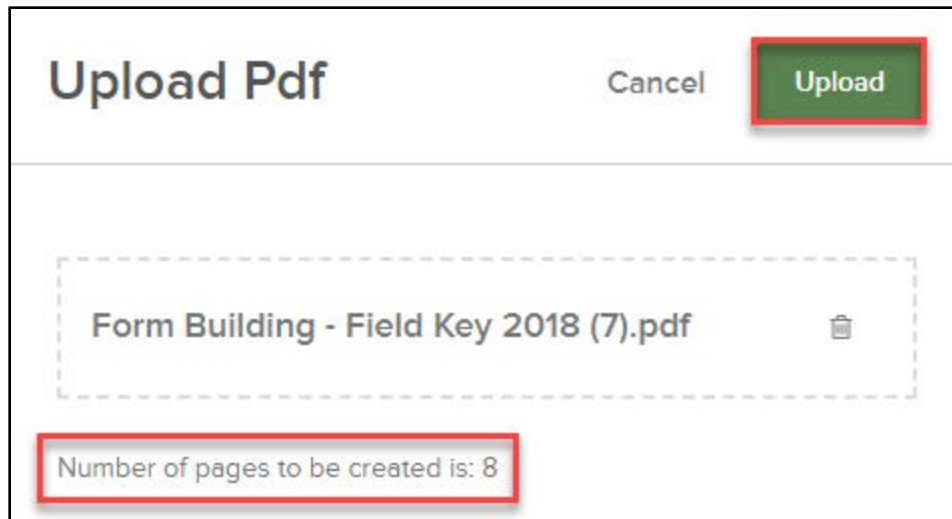


Figure 37: Upload PDF

Once uploaded, notice how the PDF has been parsed into individual pages within the chapter.

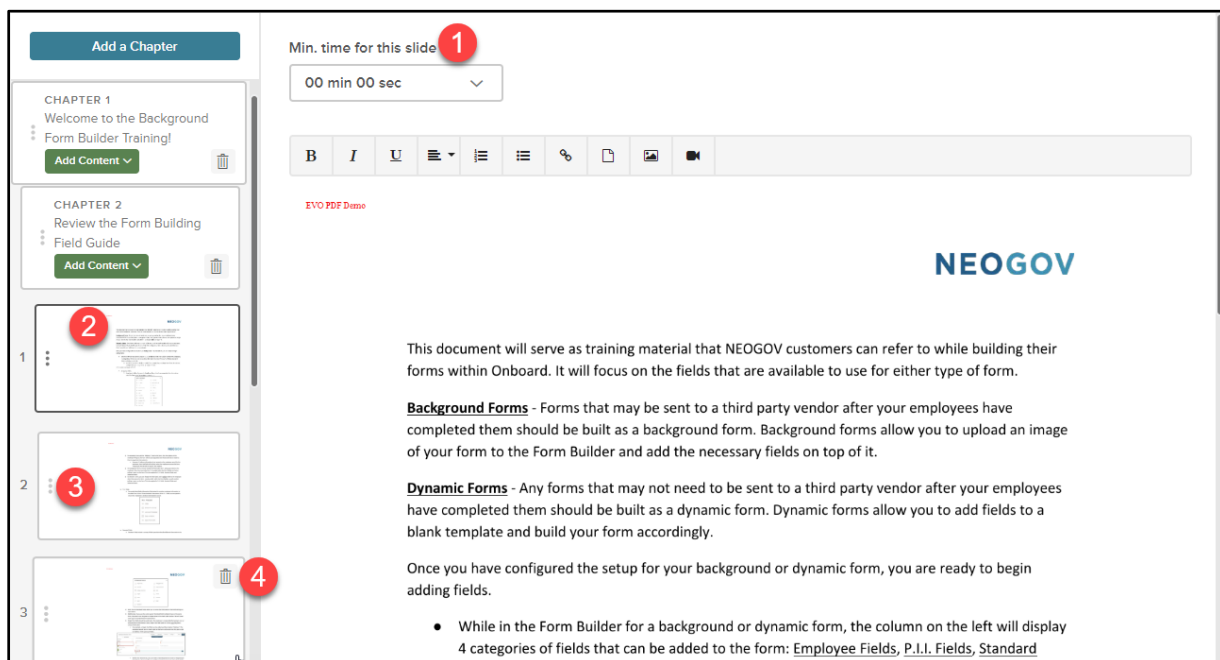


Figure 38: Parsed Out PDF

1. **Minimum Content Time:** Set a minimum amount of time (using minutes and seconds) that the learner must stay on each page for
  - a. This helps HR ensure learners are spending an appropriate amount of time on each page of the course, ultimately helping them absorb more knowledge
  - b. This value defaults from the Advanced Settings (if enabled) but can be changed per page
2. **PDF as Pages:** The PDF has been parsed into individual pages within the chapter
3. **Rearrange:** Use the rearrange icon to drag and drop the courses into a different order
4. **Delete:** Deletes individual pages from the course

**NOTE:** Additional content can be added within the page, above or below the image of the PDF page.

## Upload a Video

Another feature available to you when adding content to courses is via videos for learners to watch. As best practice, another chapter has been added for the video(s). Once the chapter has been named and any additional information is added to the main page, select the **Add Content** drop-down and choose **Add Content**.

Once the new page has been added within the chapter, a video can be uploaded. This is a great way to give your learners more interactive and engaging content to review as part of the course. The system supports videos with audio as well. The acceptable file formats are MP4, WMV, and MPG/MPEG.

To upload a video, select the Insert Video icon within the Rich Text Editor.

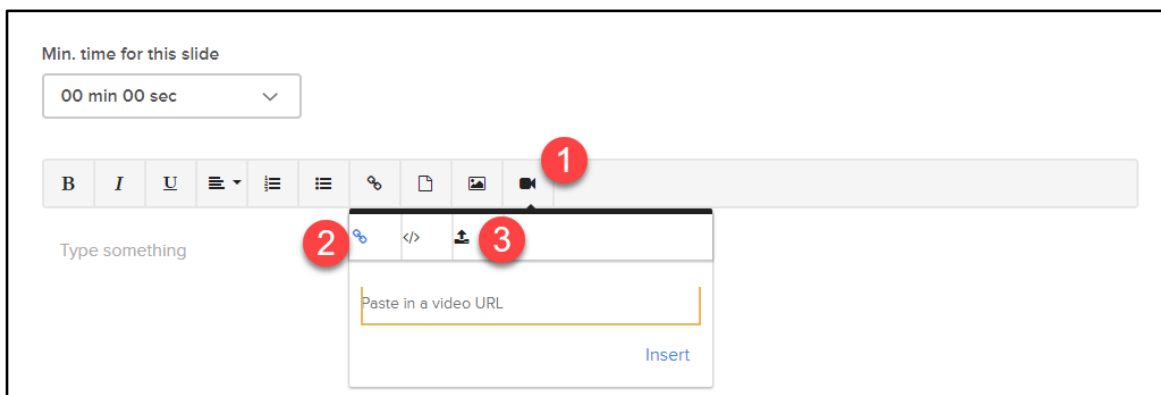


Figure 39: Insert Video Icon Options

1. **Insert Video:** The Insert Video icon on the Rich Text Editor
2. **Paste a Video URL:** Copy and paste a YouTube URL to upload the video into the course
3. **Upload Video:** Upload a video file from your computer via drag and drop or browse

Once the video has been added, the video renders within the page.

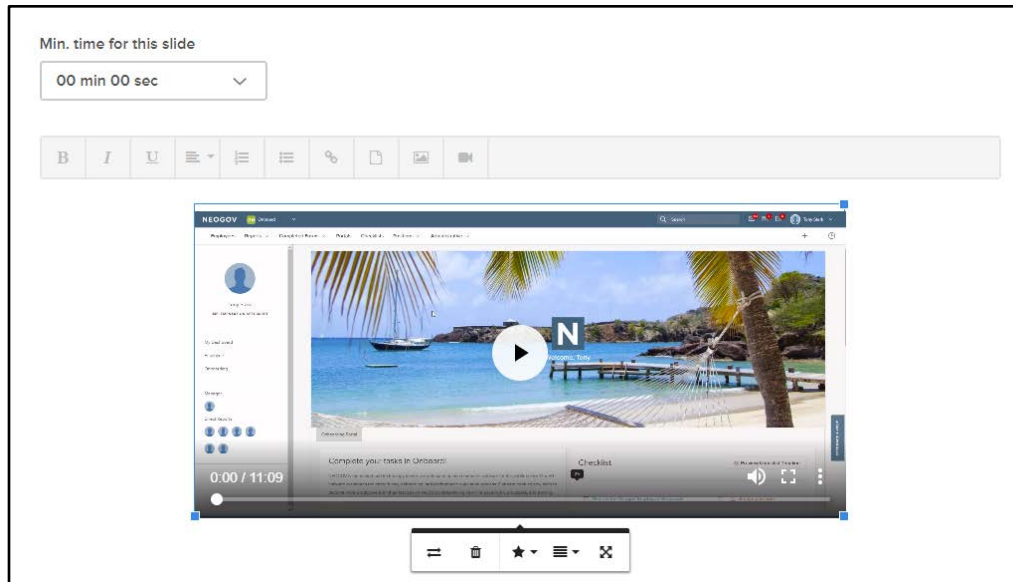


Figure 40: Integrated Video

Be sure to adjust the size, alignment, and add any additional content within the page as needed.



Consider setting the Minimum Content Time to the length of the video to ensure your learners spend an adequate amount of time on the page

## Add a Question Group

The last feature to showcase is the quiz functionality. If any questions should be asked of the learners at any point within the course, a Question Group can be added. This is also how quizzes can be configured within the course, using scored or not scored questions.

As best practice, another chapter has been added for the quiz. Once the chapter has been named and any additional information is added to the main page, select the Add Content drop-down and choose Add Question Group.

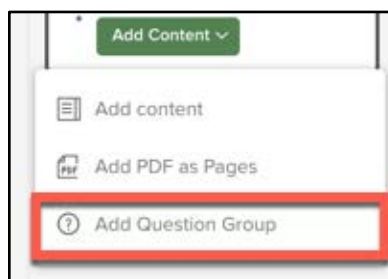


Figure 41: Add Content > Add Question Group

Once added, the Question Group page appears below its chapter.

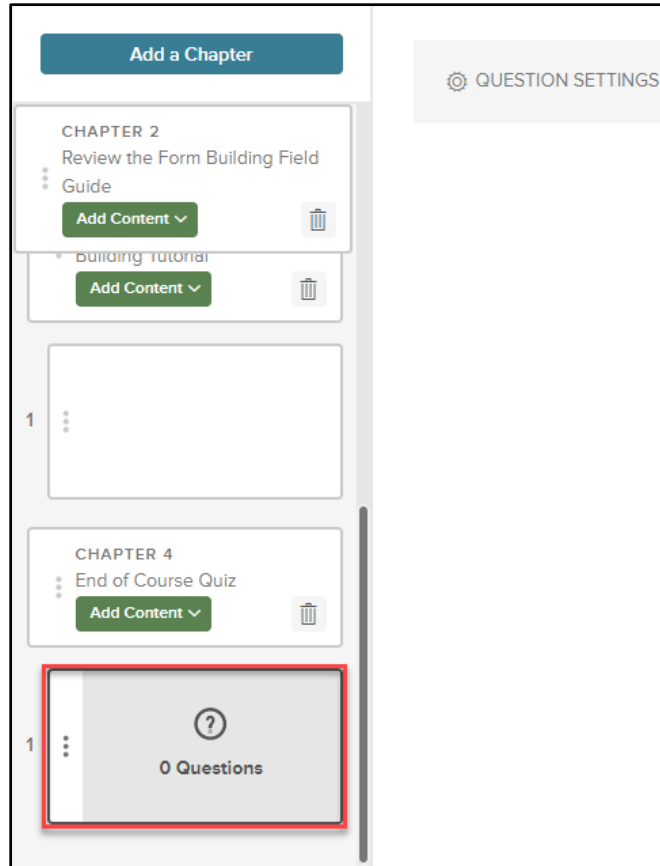


Figure 42: Question Group Page

If not already on the page, select the Question Group page to begin configuring the questions.



Figure 43: Question Settings

Before questions are added, be sure to review and configure any of the Question Settings for the Question Group. Select the Question Settings drop down to review the settings.

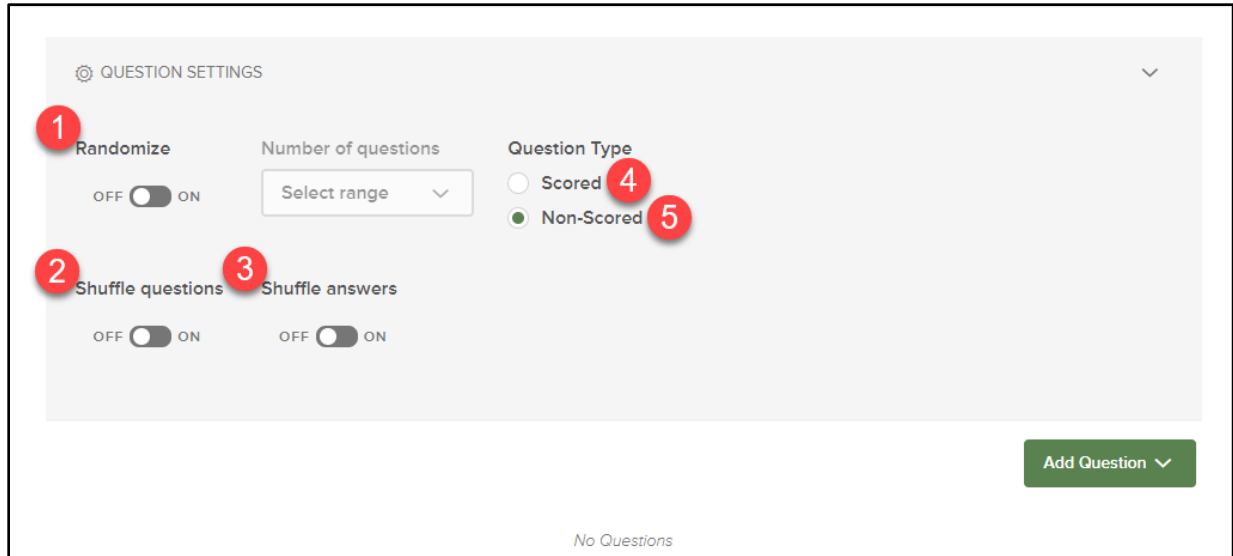


Figure 44: Question Settings Dropdown

1. **Randomize:** Opt to select only a certain number of questions from a larger question pool
  - a. For example, if 5 questions are within the Question Group, but only 3 should be asked in the course, select Randomize then enter 3 into the Number of Questions field; each time a learner takes the course, 3 of the 5 questions are asked
  - b. This helps administrators use a variety of questions that really test the learner's knowledge, while also keeping the amount of questions limited to the appropriate amount
  - c. Please note, this can only be configured once multiple questions have been added to the Question Group
2. **Shuffle Questions:** Changes up the order of questions each time the quiz is taken
  - a. Shuffling questions curtails any information sharing among learners, ensuring utmost honesty
3. **Shuffle Answers:** Changes up the order of answers each time the quiz is taken
  - a. Like the previous setting, shuffling answers prevents learners from sharing the exact order of their responses to anyone else, as the order varies for each test taker
4. **Question Type - Scored:** Select if the learner must pass the course by achieving the Passing Score percentage set by the course creator
  - a. Please note, if you set a Passing Score percentage, there must be at least one question group in the course that is Scored.
5. **Question Type - Not Scored:** Select if the questions do not need to be scored
  - a. Please note, even if the questions are not scored, learners still have to answer them to complete the course
  - b. Not Scored questions are great to include before the course content to establish a baseline of knowledge or throughout the course as challenge questions to ensure learners are paying attention and understanding the material

After the Question Settings have been reviewed, be sure to add questions below by selecting the **Add Question** drop down menu.

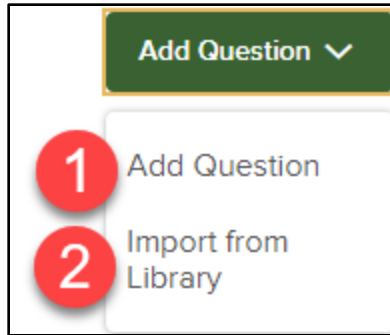


Figure 45: Add Question Dropdown

1. **Add Question:** Creates a brand-new question
  - a. Types of questions available: Single Selection, Multiple Selection, or True/False
  - b. A quick and easy way for course authors to create new questions to keep their courses as up to date and current as possible
2. **Import from Library:** Pull pre-made questions from the Question Library
  - a. This helps save course authors a lot of time by quickly choosing from a library of questions rather than spending time creating new ones

Let's review how to add questions through both options listed above. First, select Add Question from the drop-down menu. This opens the **Add Your Question** flyout.

Figure 46: Add Your Question Flyout

1. **Question Text:** Enter the question that needs to be asked of the learners
2. **Question Type:** The kind of question being asked

- a. Options are Single Select, Multiple Select, or True/False
3. **Answers:** Configure the answer options the learner can choose from
  - a. Please note, ensure the correct answer(s) is selected before saving the question
4. **Add this question to the library:** Check if the question should be saved to the Question Library so it can be used for other course quizzes
5. **+ Add an Answer:** Select this option if additional answers need to be added to the question
  - a. Please note, this option is only available for Single Select and Multiple Select questions
6. **Cancel/Save:** Once the question has been configured, select Save; if the process should be canceled, select Cancel

Notice how the answer options can also be deleted or rearranged, as seen below.



*Figure 47: Answer Option Configurations*

Now let's review how to add questions from the Question Library. Select Import from Library from the drop-down menu. This opens the Question Library.

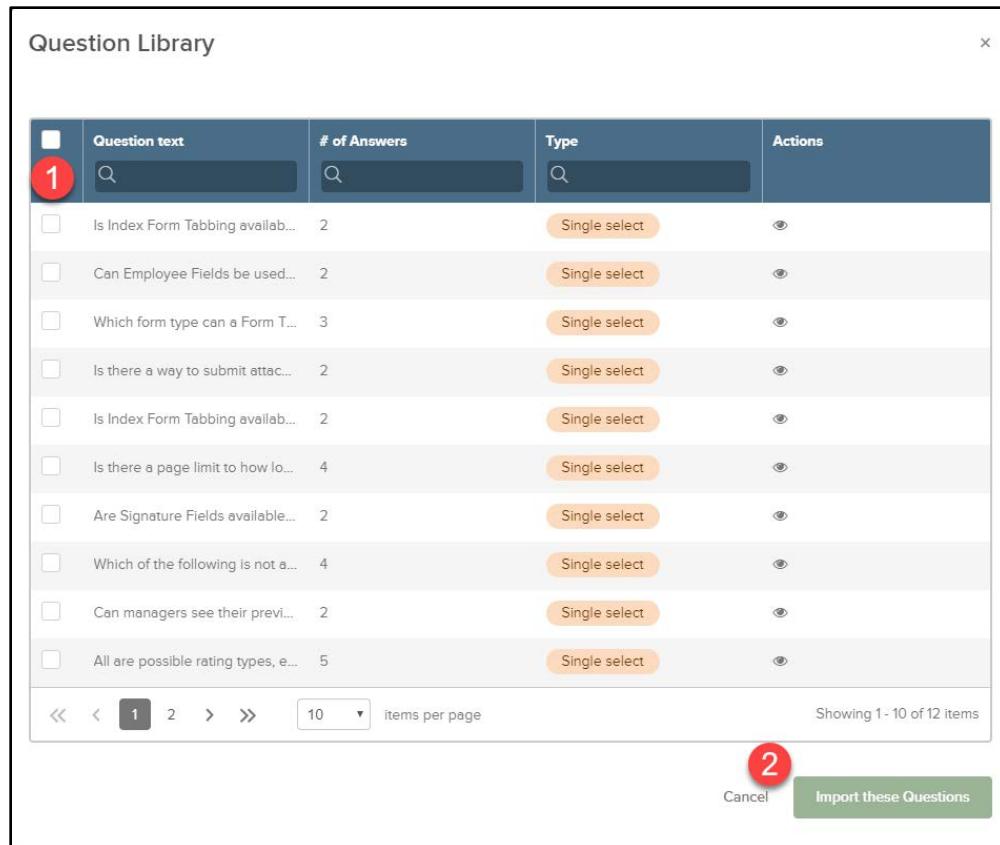


Figure 48: Question Library

1. **Question Selection:** Mark the checkboxes on the left to select the question(s)
  - a. Use the column filters to search for questions by the name, number of answers, or type
  - b. The question can also be previewed by selecting the eye icon in the Actions column
2. **Import these Questions:** Add the question(s) to the course
  - a. To cancel the process, select Cancel

Now that questions have been added, notice how they can be rearranged, edited, or deleted.



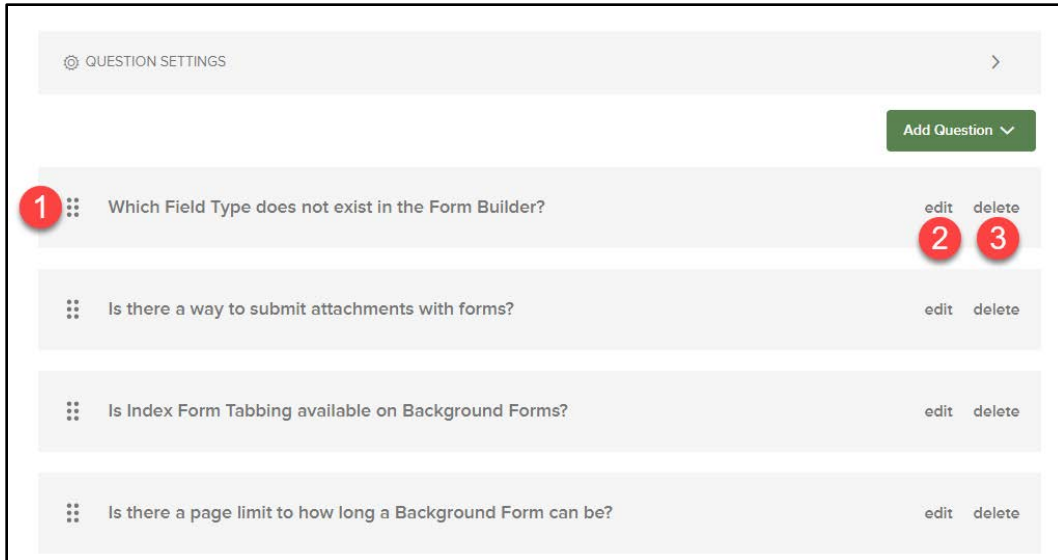


Figure 49: Question Arrangement

1. **Rearrange:** Drag and drop the questions into a different order
2. **Edit:** Change the details of the question
3. **Delete:** Delete the question from the course question group

Preview Course

Now that all the core components of the Custom Online Course have been configured, let's preview the course. To preview the course from the beginning, select Preview from Chapter 1.

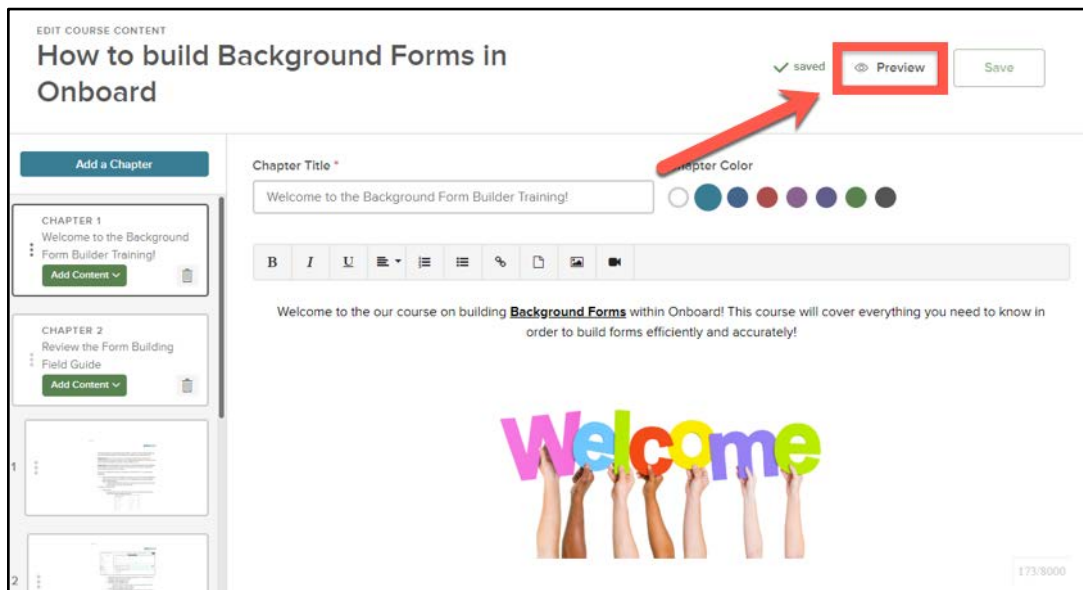


Figure 50: Preview Button

From here, the system loads a preview of the course.

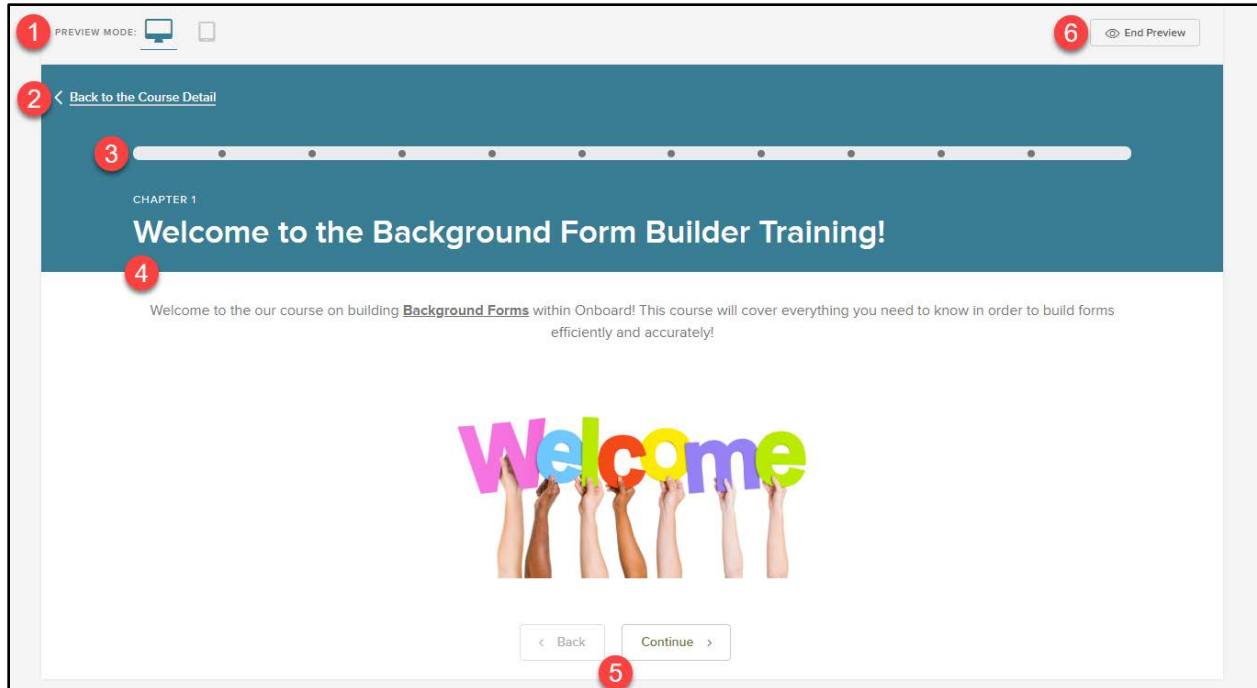


Figure 51: Preview Mode

1. **Preview Mode:** Allows the course creator to preview what the course looks like from a desktop/laptop or a tablet
  - a. Use the two icons to toggle between those different views
  - b. This is a great way to quickly preview the course from multiple device types without having to enroll yourself and take the course
2. **Back to the Course Detail:** Easily navigate back to the course detail page
3. **Progress Bar:** Shows where the user is within the course content
  - a. As each page of the course is previewed, the Progress Bar increases
  - b. Please note, you can click on any dot to jump to that page of the course
4. **Course Content:** Any content included in the course can be viewed here
  - a. Including chapter titles, images, uploaded PDF's, attachments, videos, etc
5. **Back and Continue:** Navigate through the course pages
6. **End Preview:** Return to the Edit Course Content page

The ability to preview the course, along with some other helpful features, can also be taken from the course details page.

ONBOARD

## How to build Background Forms in Onboard

This course will review how to build and configure Background Forms within Onboard. Onboard is another product from NEOGOV that allows us to facilitate our onboarding processes electronically online. A key component of Onboard is building forms and this course will train you on how to build Background Forms, which is one of the two types of forms you can build in Onboard.

Enrolled: 0  
Pending: 0

Publish OFF  ON

REQUIRED SCORE: N/A  
COURSE CODE: ON-BF-01  
SELF ENROLL: OFF  
NO APPROVAL REQUIRED

TAGS: Form Building, Attention to Detail, Background Forms, Accuracy

**1** Edit Course **2** Copy Course **3** Preview Associations

### Learner List

Edit status

Enrolled Pending

First Name	Last Name	Position	Due Date	Score	Status	Actions
No records available.						

Showing 0 - 0 of 0 Items

### Course Content

**4** + Add/Edit Content

- Welcome to the Background Form Builder Training! (0 Pages, 0 Question Groups, 00h 00m)
- Review the Form Building Field Guide (3 Pages, 0 Question Groups, 00h 00m)
- Watch the Background Form Building Tutorial (1 Page, 0 Question Groups, 00h 00m)
- End of Course Quiz (0 Pages, 1 Question Group, 20h 00m)

COURSE INFO

#### Attachments

no attachments

Figure 52: Course Details Page Options

1. **Edit Course:** Edit the course details, including any of the Advanced Settings
2. **Copy Course:** Copies the original course and its content
  - a. Useful if another version of the course needs to be created but with some changes
  - b. Once copied, make any changes necessary before publishing the course and making it available for enrollment
3. **Preview:** Another area where the entire course can be previewed
4. **+ Add/Edit Content:** Re-access the Edit Course Content page to add material or make changes
5. **Publish:** Displays the course in the Course Catalog and be available for enrollment

**NOTE:** To publish the course, there must be at least one page of content added. Additionally, if there is a Passing Score percentage configured for the course, there must be at least one scored question included in the course.