

# INQUISIQ<sup>r3</sup>

Unleash the Power of e-Learning

## Administrator Manual - System & Interface Configuration

Version 1.5

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# Administrator Menu

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To access the **Administrator** section, select the 'Administrator Menu' from Inquisiq R3™'s top navigation bar. Once you are in the Administrator Menu, you will first see the general 'Application Information' and 'Statistics' information on the left side. On the right side you will see the four categories of administrator functionality – System, Interface, Users & Groups, and Content. Note that you will only see the categories that you have been given permission to. Remember that only the Master Administrator can set permissions; which is done in the **Users** section (Administrator Menu > Users & Groups > Users).



In the 'Application Information' area to the left, you will see the name of your Inquisiq R3™ instance, along with the 'Contact' information setup in the **Account Settings** section (Administrator Menu > System > Account Settings). 'Expires' shows when your account will expire, though this will usually say "Never". Note that the expiration date is something that is set in the Control Panel when your Inquisiq R3™ instance is created (see the **Inquisiq R3™ Control Panel Manual** for more detail on the Control Panel).

In the 'Statistics' area to the left, 'Users' displays the number of current user accounts, including how many are currently logged-in to your instance. Below that is 'Disk Usage' which displays how much hard-drive space your lessons are currently using in the system.

**Note:** This manual is targeted more toward Hosted/SaaS Solutions; however it is certainly applicable to Installed Solutions as well. This document will note where any functionality may differ between the two Solutions.

# System Configuration and Setup

The first category in the Administrator Menu is **System**. If you click the symbol next to the 'System' title, the group will either collapse or expand depending on its current state. The System category generally includes basic system-level settings that usually are set up initially and then rarely revisited.

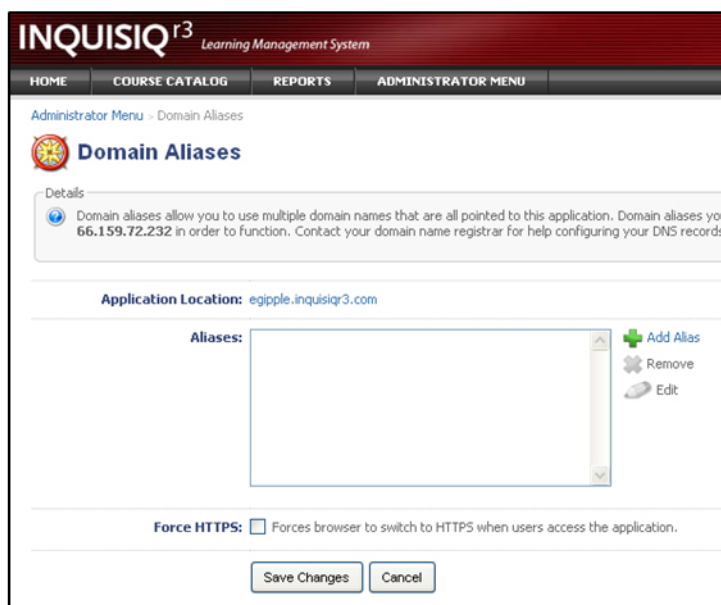


## Account Settings

On this page, you can complete various information settings, such as the name of your LMS ('Application Name'), the primary contact ('Name'), your 'Company' and primary contact 'Email'. The 'Account Name' and 'Login' settings shown on this page are related to the primary Administrator account and CANNOT be changed without contacting [Inquisiq Support](#). You may, however, change the primary Administrator password if so desired.

## Domain Aliases

On this page, you can enter any domain name you would like this instance of Inquisiq R3™ to respond to. Of course, you must control that domain name and be able to point it to the Inquisiq server. As long as the DNS settings are set up correctly for your domain (see the 'Details' note at the top of the Domain Aliases page), the Inquisiq server will resolve that domain to your instance by using the settings listed in the 'Aliases' field. Note however, that while the use of an Alias will allow your users to enter your domain to get to Inquisiq R3™, the address that appears in the browser address bar **will continue to be** the appropriate Inquisiq R3™ sub-domain (yoursite.inquisiqr3.com). If you want the URL that is displayed in the browser address bar to only be your Alias, you must be an Installed Solution and the site will have to be configured by your server administrator. If you are using E-commerce you will also need a SAN type SSL certificate.



## E-commerce



Administrator Menu - System - E-commerce

### E-commerce

Details

Select the payment processor you would like to use. Prior to saving your changes, be sure that your payment processor is PCI compliant. Required items are marked with an asterisk (\*).

\* Processing Method:

Status: **VERIFIED**

Transaction Mode:  Developer Account Only  Test Mode  Live

Display Card Icons: Select the cards that your payment gateway account accepts.

VISA  MasterCard  AMEX  Discover

On this page, you can set up the payment processor to use when customers purchase your courseware through the LMS. The Inquisiq R3™ Hosted/SaaS model currently supports two PCI compliant ‘payment gateways’; PayPal Standard, and Authorize.net DPM (Direct Post Method).

The Inquisiq R3™ Installed Solution has support for two additional ‘payment gateways’; PayPal PayFlow Pro, and Authorize.net AIM (Advanced Integration Method), which can be turned on upon installation of Inquisiq R3™ to your server.

In order to use any of the above mentioned ‘payment gateways’, you will need your own account with one of those providers. Note that you should only turn on or use PayPal PayFlow Pro or Authorize.net AIM if your server is housed in a PCI compliant environment.

What information you complete after selecting your payment processor depends on which you pick. PayPal Standard simply requires your PayPal login (email). Authorize.net DPM, PayPal PayFlow Pro, and Authorize.net AIM require more specific information. Refer to your account details with those processors to complete the required fields.

- i) Inquisiq R3™ does not store any processing information. Once the Learner elects to pay for the courses they’ve chosen in your LMS, the transaction is handed over to your payment processor. Inquisiq R3™ will retain records of the purchased courses, but not the specific credit-card information.
- ii) The **E-commerce** section is not available for trial account users. If you are a licensee and E-commerce is not enabled, please contact [Inquisiq Support](#).

## Localization



On this page, you can set the local time zone for your Inquisiq R3™ instance, just as you can do on your own computer. You can also select whether you’d like to use the US or European date formats. The ‘Default Language’ option is where

Administrator Menu - System - Localization

### Localization

Details

Customize the locale settings for this system using the form below. Required items are marked with an asterisk (\*).

\* Time Zone:

Dates and times are automatically adjusted for daylight savings changes.

\* Date Format:  US (ex: January 1, 2000)  European (ex: 1 January 2000)

\* Default Language:

you can set the language for the LMS. At this time, ICS has only developed the English language pack (look for additional language packs available in the future). Once available and installed, you will be able to choose an alternative LMS language via this option. Inquisiq R3™ is 'timezone aware' for scheduling as long as you enter the user's Local Timezone in their profile (see the Administrator Menu > Users & Groups > **Users** section). This means that times for live events will be displayed in accordance with the user's time zone.

## User Authentication

This option is generally disabled. If you need to do account authentication outside of Inquisiq R3™, please submit a ticket to [Inquisiq Support](#) requesting this option be enabled.

- i) **Overview:** In most cases, the default value of 'Inquisiq Built-In' is best. In this situation, user accounts are added to Inquisiq R3™ itself and all logins and authentications are performed against those internal accounts. However, if you have a user account system already established, you can select either 'Active Directory' for an existing AD system (only single-domain directories are currently supported) or 'Other LDAP'. Note that other LDAP systems require the licensing and installation of a third-party processing component (IP\*Works) for Inquisiq R3™ integration.
- ii) **Active Directory:** if you select AD, you will be presented with fields to complete the 'Server', 'Port', and 'DN (distinguishedname)' information, as well as other synchronization options. You should be very familiar with Active Directory if you plan on using this authentication model.



The screenshot shows the 'User Authentication' configuration page in the Inquisiq R3 administrator interface. The page title is 'Administrator Menu - System - User Authentication'. Below the title, there is a 'Details' section with a blue circular icon and the text: 'Configure the system authentication process using the form below. Required items are marked with an asterisk (\*).' The 'Authentication Method' dropdown menu is set to 'Inquisiq Built-In'. At the bottom, there are 'Save Changes' and 'Cancel' buttons.

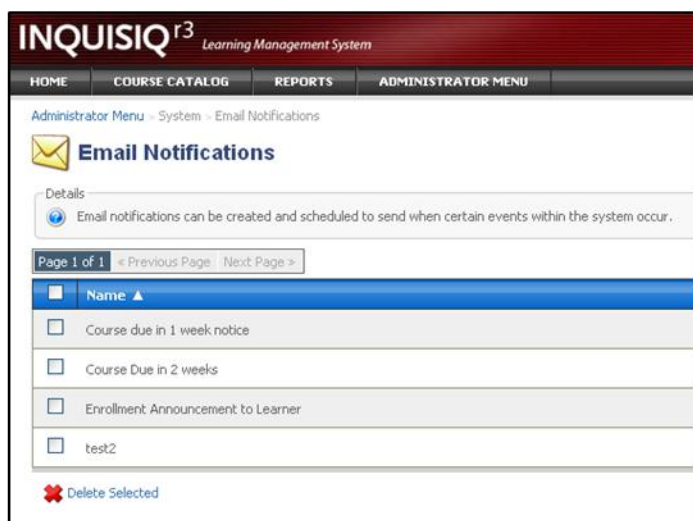


The screenshot shows the 'User Authentication' configuration page in the Inquisiq R3 administrator interface, configured for Microsoft Active Directory. The page title is 'Administrator Menu - System - User Authentication'. Below the title, there is a 'Details' section with a blue circular icon and the text: 'Configure the system authentication process using the form below. Required items are marked with an asterisk (\*).' The 'Authentication Method' dropdown menu is set to 'Microsoft Active Directory'. Below this, there are three required fields: '\* Server:', '\* Port:', and '\* DN (distinguishedname):'. Under the 'Synchronize Options' section, there are two checkboxes: 'User Account Information' (checked) and 'Group Information and Memberships' (unchecked). A 'Synchronize' button with a yellow gear icon is located below the checkboxes. At the bottom, there are 'Save Changes' and 'Cancel' buttons.

## API

An Application Programming Interface (API) is available for Inquisiq R3™. The API allows other software to interact with the Inquisiq R3™ software. Note that only specific functionality is supported by the Inquisiq R3™ API. For more details on the Inquisiq R3™ API please refer to the **Inquisiq R3™ API Manual**, which can be obtained on request from ICS Learning Group technical support - [Inquisiq Support](#).

## Email Notifications



Clicking the Email Notifications link displays a list of all current email notifications. By default, no notifications are set up in a new Inquisiq R3™ instance. You can create your own custom email notifications by associating them with a variety of system events. To create a new notification, click the 'New Email Notification' option at the top-right of the page.



There are two areas of the **Add Email**



Notification page, 'Options' and 'Message'.

- i) **Options:** Enter the 'Name' of the notification (descriptive of the notification's purpose) and whether it is 'Active' or 'Inactive'. Next, in the 'Event/Recipient' fields, select the system event that you want to trigger the email notification and whether that email notification should be sent to the System Administrator, the Learner, the Supervisor (this is the Learner's supervisor, if set in the Learner's user profile), or the Instructor. Note that the available recipients for a specific event depend on the type of event. Additionally, include your 'Reply-To' address in the remaining field.
- ii) **Message:** Here is where you enter the Subject, Priority, and Body of the email message. Note the 'Placeholders' or variables you may copy/paste into your message. These placeholders will then substitute the actual information at the correct spot of your message. For example, enter the placeholder,



##user\_fullname## to insert the full name of the user that is the recipient of the message. Roll-over the placeholders for a brief description of what each one does.

After you click 'Save Changes', you will be notified if any missing fields are required or if the notification has been successfully saved. To verify a saved notification, click the 'Email Notifications' link in the 'breadcrumb' trail at the top of the page. To edit a saved notification, click the 'Modify' icon (pencil) for the selected notification. To delete a saved notification, select the checkbox to the left of the notification in the list, and then click 'Delete Selected'.



Email Notifications may not be available to trial account users. If you are a licensee and Email Notifications is not enabled, please contact [Inquisiq Support](#).

## Datasets

As noted on the page for the Datasets feature, "Datasets hold the raw information that is extracted and sorted into reports. Datasets may be added by connecting to tables or views in the database." There are a few pre-defined datasets, such as Certificates, Course Transcripts, Purchases, and User Demographics. Note that the Purchases dataset is only available when E-commerce is enabled and a 'payment-gateway' (other than PayPal Standard) has been selected and verified. You can add a dataset for reporting purposes via the 'New Dataset' link on the right-side of the page.



When clicking 'New Dataset', the resulting page offers fields to enter the new Dataset's Name, the Table/View, and the Description. The Table/View field is not browsable – you must know the name of the table/view as it exists in the database. For such information, please contact [Inquisiq Support](#).

**Note:** Due to specific rules and functionality concerning datasets, it is advisable to consult with [Inquisiq Support](#) before attempting to create or add your own datasets.

## Login Setup

This option allows you to customize the login options for your Inquisiq instance. These are universal options that affect the behavior for all of your users.

- i) **Self-Registration:** Enabling this option allows users who visit your LMS homepage an opportunity to self-register and create a user account and login for themselves. When the

Self-Registration option is enabled, you can choose to use the registration page that is built into Inquisiq R3™, or you can specify a URL to a custom/external registration page. Note that if you use a custom/external registration page, it must be able to connect to Inquisiq R3™ through the Inquisiq R3™ API or a direct connection.

- ii) **Forgot Password:** Enabling this option will display an “I forgot my password” link under the LMS login area on the home screen. When the user clicks this link, the LMS will reset the user’s password to a new randomized string of characters and send it to the email address associated with that user. However, if the user does not have an email account under their profile, this feature will not work. If this option is unchecked, users will not be able to reset their password without logging in.
- iii) **Default Landing Page:** This option allows you to select the page your users will first see once they login. Within the LMS, the standard options are ‘Home’, ‘Course Catalog’, or ‘My Account’. The ‘Other’ option allows you to specify any other page URL within the LMS, or an external URL...though directing users away from the LMS on login may cause some confusion.
- iv) **Simultaneous Login:** This option is not enabled by default. Enabling this option allows users to be simultaneously logged into the LMS from multiple workstations, or even browsers on the same machine, under the same user account. If this option is unchecked, once a user has logged into the LMS, any subsequent login attempts under that account will be blocked. The LMS will not allow a second login for the same user account until the original session has been properly closed. This feature adds security and ensures that your users are not sharing accounts. However, it can be inconvenient should a user not properly log out of the LMS.

For example, if a user simply closes the browser without logging out, the user’s LMS session is still active and the system will not allow them to log back in until the original session has timed out (the session timeout duration is dependent on the server but can be up to 20 minutes). However, the Master Administrator can always disconnect a user if they would like to terminate a session. To do this, the Master Administrator would go to Administrator Menu > Users & Groups > **Users** section and click the “Disconnect” button for the appropriate user.

- v) **Login Priority:** When Simultaneous Login is disabled, you have the option of setting the priority of user logins when attempts are made to log into the LMS from multiple workstations. Selecting **First Login** as the login priority means that the first user logged in for a given username maintains their session until logged out or the session expires, and simultaneous login attempts for that username will be denied. Selecting **Latest Login** as the login priority means that the latest user logged in for a given username takes-over; all other sessions for that username will be automatically logged out.

## User Account Data

On this page you can configure the details of the data associated with every user's account. For example, you can determine what data is to be included as part of the user's profile, what the data field will be called, and who is allowed to view or modify it. You can also create a variety of new field types that can use a variety of input mechanisms such as radio select buttons or pull-down lists. You can also designate what fields are required and can even add rules to ensure that the entered data is correct or validated.



To access the **User Account Data** screen, go to the Administrator Menu > System Category and click the 'User Account Data' icon. Note this screen may take a few seconds to display as it contains a lot of data. The screen is made up of the following inputs, options, and controls:

- i) **Registration Instructions:** These instructions appear at the top of the User Registration Form when a user self-registers for an account in your LMS (assuming this option has been enabled on the Login Setup screen). Note that there are some formatting controls under the text entry box that let you do simple things like bold or italicize text. You can also create bullet lists or add links.
- ii) **Field Labels (names):** Note that below the Registration Instructions entry box is a list of all of the data fields in the LMS. This list is extensive and includes all of the data related to each user in the system. The first 37 items are standard fields that the system comes with by default. There are also an additional 10 user-defined fields that you can use for any other purpose. The left-most column in the list is called **Field**. The field column is how the LMS references the data field and cannot be changed. However, the second column is called **Label** and is the name the field displays when viewed in the LMS page itself. In most cases you can probably keep the default, but it can be changed to whatever you prefer. To change the label for a data field, click on the black arrow directly to the right of each data field label. Doing so will bring up a window that will prompt you to enter a new label. Note that you must have your pop-up blocker set to *'always allow pop-ups from this site'* and to allow scripted windows for this function to work properly.
- iii) **Admin. View:** The next column in the list gives you control over

Field	Label	Admin View	User View	Reg. Form	Req.	Options
First Name	First Name 	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Modify	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Modify	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Modify	<input checked="" type="checkbox"/>	
Middle Name	Middle Name 	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Modify	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Modify	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Modify	<input type="checkbox"/>	
Last Name	Last Name 	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Modify	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Modify	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Modify	<input checked="" type="checkbox"/>	
Email	Email 	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Modify	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Modify	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Modify	<input type="checkbox"/>	
Username	Username 	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Modify	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Modify	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Modify	<input checked="" type="checkbox"/>	

- whether or not the Administrator can view and modify a specific data field. In general, it is required that for a data field to be used, it must be viewable by the Administrator. If you want to essentially disable a particular data field, you can uncheck the view control box for the Administrator. The field will remain in the database but it will be invisible (since no one will see it). Notice that you can also control whether or not the Administrator can modify a field. In general you will want to allow your Administrator to modify most fields but there may be cases where you want this locked down so that only the user can change it.
- iv) **User View:** This control allows you to specify which fields users can view and modify in their own profile. For example, there may be fields like Job Title that can only be changed by a supervisor with User Manager administrative permissions.
  - v) **Reg. Form:** This column lets you control which fields will appear on the User Registration form that is presented to users who are self-registering for an account in your system (assuming Self-Registration has been enabled). This control is very important if you wish to create a custom registration form and capture specific user profile data. Also note that you can use the custom user-defined fields to capture any additional information that does not come as a standard data field. See the **Options** description below to learn how you can create pull-down selection lists as well as add rules that can validate the data entered by your users.
  - vi) **Req. (required):** Checking this box makes the data field required. This means that it will always appear with a small red asterisk next to it indicating that the field must be completed. Trying to save the form without this field filled-in will cause an error and the user will be prompted to complete all required information.
  - vii) **Options:** The Options dialog lets you configure any options that are specific to the data type you selected in a given data field. Note that many of the fields that are standard come with a data type built-in so you cannot change them. However, for the user-defined fields at the bottom of the list, the Options dialog is critical and must be set up.

For example, let's say that you would like to add a custom field called 'Access code', where this code must be entered by a registering user to gain access to the system. In other words, if the code is not correct they will not be allowed to complete their registration. To do this, follow these steps:

- a. Click the 'Change Label' icon (the little black arrow) next to the label for User-Defined Field 00. When the Label dialog box pops open, enter 'Access Code' and click Save.
- b. Next decide if you want the Administrator and the user to view and modify this field. In this example we will select 'Yes' so either the admin or user can view and change the field. Click the View and Modify check boxes in both the Admin View and User View columns.
- c. To make sure that this field appears on our User Registration Form, click the View check box in the Reg. Form column. Note that the Modify box is automatically

checked since users must be able to modify fields on the Registration Form (i.e. enter text).

d. Now let's decide if this should be a required field. In this case, the whole purpose

Field	Label	Admin View	User View	Reg. Form	Req.	Options
User-Defined Field 00	Access Code	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Modify	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Modify	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Modify	<input checked="" type="checkbox"/>	
User-Defined Field 01	User-Defined Field 01	<input type="checkbox"/> View <input type="checkbox"/> Modify	<input type="checkbox"/> View <input type="checkbox"/> Modify	<input type="checkbox"/> View <input type="checkbox"/> Modify	<input type="checkbox"/>	
User-Defined Field 02	User-Defined Field 02	<input type="checkbox"/> View <input type="checkbox"/> Modify	<input type="checkbox"/> View <input type="checkbox"/> Modify	<input type="checkbox"/> View <input type="checkbox"/> Modify	<input type="checkbox"/>	
User-Defined Field 03	User-Defined Field 03	<input type="checkbox"/> View <input type="checkbox"/> Modify	<input type="checkbox"/> View <input type="checkbox"/> Modify	<input type="checkbox"/> View <input type="checkbox"/> Modify	<input type="checkbox"/>	
User-Defined Field 04	User-Defined Field 04	<input type="checkbox"/> View <input type="checkbox"/> Modify	<input type="checkbox"/> View <input type="checkbox"/> Modify	<input type="checkbox"/> View <input type="checkbox"/> Modify	<input type="checkbox"/>	

of this is keep people out of your system unless they have provided access code that you give them. In such a case, make sure this box is checked to make the field required.

- e. The next step is to configure the Options for this data field. Click the pencil icon to bring up the Options dialog box. Set the input type by using the pull-down selector and chose from the options; Text Field, Date, Radio Buttons, Checkboxes, Select Box (single select), or Select Box (multiple select). Depending on what input type you select, other parameters may be required. For this example we will select 'Text Field'.
- f. The final step is to configure the Regular Expression so that this field will only get a match (validate) when the user enters the provided access code. If we just have one access code we simply enter it into the field. However if we had several codes, we would enter them here with the proper nomenclature. Please see the **Grouping Rules** section or any [other references on regular expressions](#) to learn more.

viii) **User Agreement:** just as with the registration instructions, you can choose to include a User Agreement. There are the same formatting controls under the text entry box. In addition to crafting a user agreement, you can optionally display a check box under the user agreement on the registration for labeled "I agree" that the user will be required to check in order for their registration to be accepted.

ix) **Form Previews:** the form preview buttons at the bottom of the page allow you to view how the registration and user account forms will look to both the administrator and the user, based on the selections from the Data Fields section further up on this page.

## Grouping Rules



Grouping Rules provide a powerful feature that allows you to create rules that will automatically add users to specific groups based on their user account data or profile. In other words, based on the users address, company, job title, or any other user data field, they can automatically be added to specific groups. Grouping Rules can even be used to automatically create groups on the fly if desired. Of course, once the user is in a group, all of the group functions such as automatic group course enrollments, access to private course catalogs, and providing scope control over permissions, come into play.

To access the **Grouping Rules** screen go to the Administrator Menu > **Systems** section. Click the 'Grouping Rules' icon to bring up the related screen. You will notice that this Grouping Rules screen is divided into two areas, each accessed by a tab on the top of the screen.

- i) The first tab, **Properties**, allows you to specify what scenarios will trigger the Grouping Rules and cause them to be executed. There are eight scenarios that are broken down into how the user data gets changed; the first four relate to a new user account being created and the last four scenarios relate the user data being modified. Additionally, the scenarios are further separated into the different mechanisms that may have created or modified the account data.

For example, you can differentiate between a situation where a user self-registers or modifies their own account data, versus a situation where an Administrator changes the data or performs a batch upload. Generally speaking, you will want all scenarios to cause the rules to run. However, if desirable, you can have certain actions cause rules to run while others do not. Also note that these scenarios apply to the execution of **all** of the rules. At this time you cannot select different scenarios for different rules. In other words, the scenarios that you check will cause all of the rules to run. Once you select the scenarios you want, make sure to click the 'Save Changes' button on the bottom of the screen.

- ii) The second tab, **Rules**, provides access to the rules themselves. Any rules that currently exist will be listed on this screen. To edit one of the existing rules, click it to display the associated

Actions on the right side of the screen. You can both modify and delete rules as well as move them up or down in the rules list (if you have multiple rules set up). The list order is important because the rules run in the order that they appear in the list. This allows you to establish, as part of a specific rule, whether you want the rule to be skipped based on matches in previous rules.

- iii) To create new rule, click the 'New Rule' icon on the right side of the screen. This will cause the Add Rule window to pop open prompting you to configure the rule. The rule will have the following elements that define how it will behave:



- (1) **Field:** This is a pull down list that will allow you to select which User Account Data field the rule will be based on. For example, if you want this rule to add the user to a group based on the value of their Department field, you would select 'Department' from the pull-down list. Note that the pull-down list will contain all of the user profile fields that you have set up in the **User Account Data** section – including any User Defined fields that you may have set up.
- (2) **Matches:** This field is where you enter the 'regular expression' that will be used to determine if a match exists, causing the user to be added to the specified group. Note that solid knowledge of regular expressions is important at this point and should be investigated before continuing. There is an abundance of resources that are available to explain the use of regular expressions that can be easily identified with any search engine. It should also be pointed out that the regular expressions that are implemented in Inquisiq R3™ are not case-sensitive.

As a simple example, let's say that you want to determine when the department field is equal to "safety," then you would simply enter the word "safety" in this field. However, note that if you have departments called "fire safety" or "safety 1" then those would also be considered matches. To be more specific you could define the regular expression as "^safety&" which will only match when "safety" alone is present. Again, detailed knowledge of regular expressions is important, especially if you want to develop more sophisticated expressions. Below is a table that shows some very basic examples of how you may decide to use regular expressions.

Regular Expression example	Description	Examples that will match
Safety	Will match any expression that has the letters "safety" imbedded within it.	'Safety', 'Fire safety', 'safety1', ...
^Safety&	Must match "Safety" exactly	'Safety' only

^(safety1 safety2)\$	Will only match for safety1 or safety2 exactly	'Safety1' or 'Safety2' only
----------------------	--	-----------------------------

(3) **Join User To:** This field allows you to select what group the user will join if a match exists between the selected field and the regular expression, if any. Select a specific group you want the user added to from the pull-down list of all groups within the system.

If you select the other option, 'group with name', then you are prompted to enter the name of a specific group. You can also set the rule to automatically create the group if does not already exist. This can be a powerful feature as it lets you create groups on the fly and add the user to that group.

(4) **Options:** This field allows you to control whether or not the rule should be skipped based on whether or not a previous rule was matched for the same user account data field, or optionally, for any user account data field.

iv) In addition to setting up scenarios whereby the grouping rules are activated, you can also apply the various grouping rules that you've set up immediately by clicking on the Apply All Rules Now button on either tab.

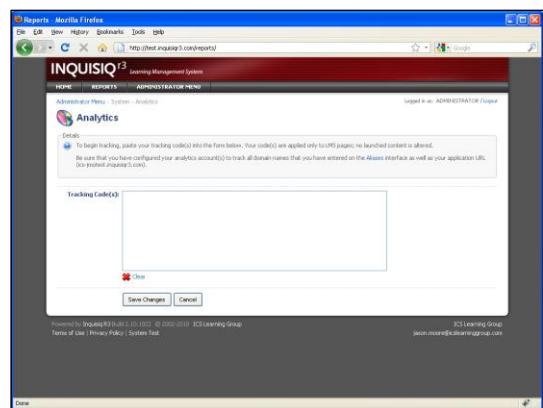


This will execute the rules immediately, regardless of the scenario. So, if you wanted to create a new group and assign some of your existing users to that group based on a field that was already entered, you could set up a rule for this and use this button to assign them to the new group immediately.



Google Analytics or other web traffic analytics solution can be used with Inquisiq R3™. These tools will give you insight into how users navigate through your LMS and what pages are popular. To use these tools you will first need to set up an account with the solution provider you prefer. These tools will give you tracking codes that can then be put into your LMS to enable the analytics tracking to occur.

To set up your analytics tracking codes go to the Administrator Menu > System Category and select the 'Analytics' icon. This will bring up the Analytics page where you can enter your tracking codes. Make sure to click Save before leaving the page.

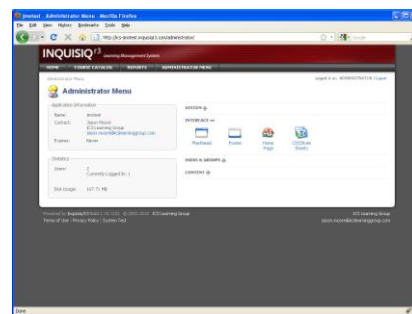


Once you enter your tracking codes, Inquisiq R3™ will automatically embed your tracking codes on key pages within your LMS which will now be tracked by your solution provider. The LMS pages that will contain the tracking code are shown in the next table.

<b>Inquisiq Analytics: Tracked Pages</b> <b>(pages that your tracking code is added to)</b>
Home Page
User Registration Page
All Course Details Pages
All Catalog Pages
User Self-Enroll Action Page
Catalog Search Results Page
Catalog Session Details Popup Page
PayPal Pages (forward to PayPal for payment, success, and cancel when using Website Standard option)
My Account / Shopping Cart Page
My Account Page
My Account / Profile Page
Enrollment (Lesson) Launch Action Page
My Account / Enrollment Details View Page
Site Offline Page
Privacy Policy Page
Terms and Conditions Page

# Interface Configuration

The second category in the Administrator Menu is **Interface**. If you click the symbol next to the 'Interface' title, the group will either collapse or expand depending on its current state. This category is where you can customize the user interface components of your Inquisiq R3™ instance. For example, the banner along the top, the home page message, and the footer information that appears at the bottom on the screen can all be changed to your preferences.



## Masthead

With this option, you can configure the image(s) shown at the top of your Inquisiq instance. There are three components to that top banner (aka 'masthead'); the left-side image, the right-side image, and the background – which can be an image or just a fill color.

**The Left-side Image:** Each Inquisiq instance comes with a supplied default image for the left side (the Inquisiq R3™ Logo). You can replace it this with your own image. The left-side image will be aligned to



the top left of the screen and will appear as it would in its original form (it is not resized to fit specific dimensions). Note that once you upload your own image, you cannot “delete” the image (revert back to the default image), you can only replace the image you have uploaded with another image.

**The Background Image:** The background image is optional and can be either an uploaded image or a selected color. Note that the left-side and the right-side images will always sit on top of the background. It is also important to note that the background image will always tile itself to fill the entire banner space – although all that you will see is what is not covered up by the left and right-side images. The amount of tiling is dependent on the background image's size relative to your left and right-side images.

**The Right-side image:** The right-side image is optional and will always stay aligned to the right side of the screen.

The image below shows the three elements working together to create the site banner.

Left-side Image	ckground	Background	Background	Background	Right-side Image	
	ckground	Background	Background	Background		
	ckground	Background	Background	Background		

Image types are limited to JPEG, PNG, and GIF (BMP will not work). Note that you can use any size image you want for any of the three Masthead images, but a good practice is to limit the height of the image to approximately 50 pixels. The height of the banner will be determined by whichever image is tallest amongst the left or right-side image (the background image height has no bearing on banner height).

## Footer

In this area, you can modify the properties of the footer that appears on the bottom of every page in the LMS. These properties are for display only and have no internal LMS functionality. None of these properties are required.

- **Company Name:** type your company name or whatever other information you'd like to display in this part of the footer. The information you enter here will be displayed on the bottom right side of the screen.
- **Email:** enter the email address that you want people to use to contact you. This should be a real, valid email address as it will automatically be formatted as a 'mailto' link. This is a good way for your customers or users to contact you for support or other such issues.
- **Web Site:** select 'http://' or 'https://' in the pull-down and then enter the URL for your company website, or any other website you'd like to link to from the Inquisiq footer. The Company Name that you enter above will become a clickable link that will go to the address you provide in the Web Site field. Note that since the 'http://' or 'https://' is provided for you as a selection, you should NOT include these in the address field you type in.

## Main Menu

In this section, you can configure the main menu for the site. The menu for the site is very configurable and you can change the order of the menu items as well as the actual text and you can even add your own custom menu items.



To rearrange the order of menu items, simply click on one in the menu representation on the page and drag it to a different position, then click the “Save and Apply Changes” button. To add a new menu item, click on the “+” button which will appear to the right of all the other menu items and has the following fields to fill in:

**Button:** this is actually not a field that can be changed but rather is an indicator of what the button represents. For added buttons, the label will read “[CUSTOM\_00]”, “[CUSTOM\_01],” and so forth. For the other buttons, a label that is appropriate to that button will display, such as “[COURSECATALOG].” This can be helpful if one has customized the standard buttons to have different text from the default.

**Label:** this will affect the actual text of the button. Please note that Inquisiq will only display upper case letters in the menu, and so will convert any lowercase letters to capitals.

**Login Required:** if checked, then the menu item will only be visible when a user has successfully logged in.

**URL:** this is the website url which is the new button will link to when clicked. Select ‘http://’ or ‘https://’ in the pull-down and then enter the URL. Note that since the ‘http://’ or ‘https://’ is provided for you as a selection, you should NOT include these in the address field you type in. Optionally you can check the box “Open this URL in a new window when clicked” which is underneath the URL field. Checking this box, as the text indicates, forces a new browser window to be opened when the button is clicked.

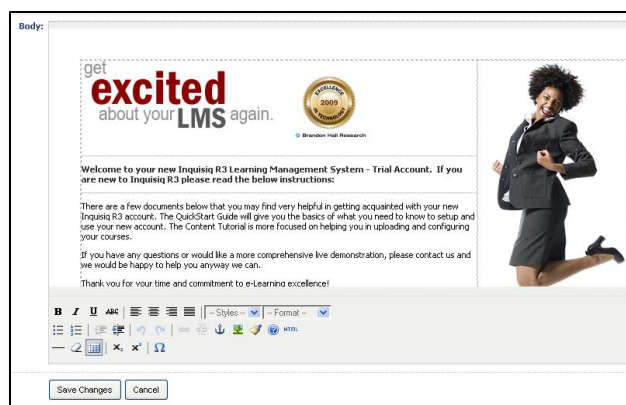
Once all the fields are entered, click the Update Preview. You will now see the menu item in the menu bar on the page (not the real menu bar), and can continue to add new menu items, delete items, and reorder them. **Please note, however, that for any of these changes to stick and to go live on your site, you must hit the “Save and Apply Changes” button before exiting the page. Otherwise, any changes or additions will be lost.**

If you wish to delete a custom menu item that you have added, you can do so by clicking on the red x next to the text on the menu bar representation on this page, and then clicking on the “Save and Apply Changes” button to confirm the deletion.



## Home Page

In this section, you can configure the appearance of the ‘home page’ of your Inquisiq instance. The home page is likely the first page visitors see when they go to your Inquisiq URL. By default, this contains



minimal information, though you can stylize your message using the basic formatting tools provided or you can create a completely custom page by editing the HTML.

You have two 'Page Style' options:

- **Simple:** if selected, all you enter is a Headline. This is the default.
- **Advanced:** if selected, you can edit the body of the message. Several formatting tools are available below the Body field for stylizing the message and you can even embed your own html that you've written in an external editor.

## CSS / Styles

Here you can go even deeper into customization of the LMS 'look and feel' by creating a custom style sheet. As noted on this page in the LMS, it is recommended that you use a developer tool such as Firebug to edit and preview your changes prior to saving – additionally, such a tool is necessary to discover the IDs and Classes for the various page elements of Inquisiq R3™'s interface since there currently is no document available that includes this information. Use care when modifying display properties of elements and make sure to test your modifications on as many different browser versions as possible, since necessary parts of the page can be inadvertently obscured on one browser but not another.