

INQUISIQ^{r3}

Unleash the Power of e-Learning

Version 1.0

Implementation Guide

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Product Support

If you have purchased a support package and have any questions during the use of Inquisiq R3™ that are not addressed in this guide, go to <http://support@icslearninggroup.com>, or call 410-975-9440, or write to:

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<http://www.icslearninggroup.com>

Overview

This Implementation Guide is designed to assist you with the initial setup of your Inquisiq R3 LMS by providing a comprehensive overview of the elements that should be addressed during your initial setup. Note that the details on any one specific topic can be found in the Inquisiq R3 Manuals and this document is more designed to provide a roadmap as to the order of the things that should be considered during your setup. It is also not an exhaustive list of everything that should be considered for every installation, and only includes the items that are most common.

This guide is broken down into two primary areas:

- Inquisiq R3 configuration items that should be completed in a specific sequence.
- Inquisiq R3 configuration items that can be completed at any time, but should be completed before you formally launch your LMS.

If you have additional questions that are not addressed in this guide please also visit our support site at <http://support.icslearninggroup.com> or contact our support staff for assistance.

Initial Inquisiq R3 Configuration - Sequential

When you first get your Inquisiq R3 LMS, it is basically a “blank sandbox”, and you will need to configure everything in the system to suite your needs. When you first create your LMS account, whether through a free trial or through the control panel, you will be creating the “Master Administrator” login account. It is important to note that the Master Administrator is NOT a user in the system, so they may not enroll in courses (they have no “My Account” screen). The Master Administrator has all the administrative rights available in the system, plus one extra permission that only they can have, which is the ability to assign permissions to other users.

After you have created your new account, the following is the general sequence of items that you should follow to get the most out of your new Inquisiq R3 LMS.

Step #1 – Create yourself as a user

After you create your new account, you will have to login for the first time as the Master Administrator (username “administrator” or “admin”) along with the password you selected when you created your account. Once logged in, click the “Administrator Menu” tab in the menu bar, open the “Users and Groups” area, click on “Users”, and then click on “New User” to create yourself as user in the system. After you save that, click on the “Permissions” tab in the Tools menu block, and check off all of the boxes and save it. This will assign all the permissions to you as a user. From this point forward, unless you need to assign someone specific permissions, you will want to login as you, the user.

Step #2 – Login as you the user

If you are still logged into the system as the master login, log out, and log back in as you the user. You will notice now that you have a “My Account” menu link. Click on the “Administrator Menu” tab in the menu bar to begin your system configuration.

Step #3 – Configure your “Login Setup”

At this point you will need to decide how your users are going to get into the system (self –registration, admin upload, synchronized from outside sources, or some combination of these). In the Administration menu, open the “System” folder, then open the “Login Setup” and set everything. Complete details can found in the Inquisiq R3 System & Interface Configuration manual. By default, your application will allow users to create their own account by using the registration link on the home page.

Step #4 – Configure your “User Account Data”

After you have decided how users will get registered into the LMS, you will need to determine what User Account Data you would like to collect. This will usually differ if you have your users self-register vs. importing them from another system. In the Administration menu, open the “System Folder”, then open the “User Account Data” and set everything. In that menu, you will have roughly 50 separate items that you may collect as user account data. By default, Inquisiq R3 requires a “First Name”, “Last Name”, “Username” and “Password”. You cannot change these. All of the other fields you may change, including the label, who can view them, and if they are required or not. In addition, we give you 10 “User Defined Fields”, which you can configure any way you want. Complete details can found in the Inquisiq R3 System & Interface Configuration manual.

Step #5 – Configure “Localization”

Localization is important if you plan to have synchronous events such as classroom or web meeting sessions. Localization will make sure that all your users show up at the correct time regardless of their time zone. You will also set your date format here (US or European format). In the Administration menu, open the “System Folder”, then open “Localization” and set everything. Complete details can found in the Inquisiq R3 System & Interface Configuration manual.

Step #6 – Configure “E-commerce”

If you plan on selling your courseware, you will need to configure the E-commerce system. In the Administration menu, open the “System Folder”, then open “E-commerce” and set everything. Complete details can found in the Inquisiq R3 System & Interface Configuration manual.

Step #7 – Upload and configure your Courseware

Since Inquisiq R3 is a pure LMS, it has no ability to create courseware. As such, you will need to create your courseware in one of the many SCORM compliant authoring tools on the market (ie: Articulate, Captivate, Lectora, Rapid Intake) and upload the SCORM compliant .zip file into your LMS. Once uploaded into Inquisiq, you may configure the SCORM package as a complete course or as an individual lesson. In the Administration menu, open the “Content” area, and then use both “SCORM Packages” and “Courses” to set everything. Complete details can found in the Inquisiq R3 Content manual.

Step #8 – Set up your Course Catalog

Now that you have your courses uploaded and configured, you can build and arrange them into your course catalog. You will want to consider if you want catalogs within catalogs, and which catalogs that you want to remain “Private”. Catalogs that are labeled as Private may be assigned to any group or individual. You will first create all your catalogs, and then you will assign the courses included in each

catalog. Once you have all your catalogs and courses setup, you will assign catalog rules. In the Administration menu, open the “Content” area, then open “Catalog” and set everything. Complete details can found in the Inquisiq R3 Content manual.

Step #9 – Create your “Groups”

The “Group” function is one of the most powerful features in the Inquisiq R3 LMS, and by using them correctly you will be able to automate many enrollment processes. You will want to create all your groups now. Each user can be in none, some or all of your groups. You may assign each group any number of course enrollments along with access to private catalogs. A key point is that groups have inheritance, which means that any user who joins the group will inherit the enrollments, private catalog access and permissions assigned to that group. In the Administration menu, open the “Users and Groups” folder, then open “Groups” and create everything. Complete details can found in the Inquisiq R3 Users and Groups manual.

Step #10 – Create your “Grouping Rules”

Grouping rules are automated ways to have your users join groups. You may assign a rule attached to any input in the User Account Data to put a user into any Group. For example, if you had a group called “Bob’s Group”, and in your User Account Data area, your user had “Bob” in the Supervisor field, you could make a rule that if that if the Supervisor field equals Bob, put them in the “Bob Group”. In the Administration menu, open the “System” folder, then open “Grouping Rules” and set all your rules. Complete details can found in the Inquisiq R3 System Interface and Configuration manual.

Step #11 – Setup “Coupon Codes”

If you plan on selling your courseware, you may want to use the Coupon Codes to offer discounts to your clients. In the Administration menu, open the “Content” folder, then open “Coupon Codes” and set everything. Complete details can found in the Inquisiq R3 Content manual.

Step #12 – Setup your “Certificates”

If you plan on awarding viewable and printable certificates to your users upon completion of a course or series of courses, you will want to configure all your certificates now. While Inquisiq gives you a generic certificate template, we highly encourage you to scan in your unique blank certificate template, and upload the .jpg image of the template into your LMS. In the Administration menu, open the “Content” folder, then open “Certificates” and set everything. Complete details can found in the Inquisiq R3 System Content manual.

Setup any time before you go live

While some items should be setup in a certain order, there are a few items that can be setup and configured any time prior to your formal launch of your LMS. The following items are listed in no particular order.

Create your Branding

Branding is a powerful feature of Inquisiq, which allows you to create a unique banner, footer, menu bar and homepage for each LMS instance. In the Administration menu, open the “Interface” folder, then

open the appropriate folder and set everything. Complete details can found in the Inquisiq R3 System Interface and Configuration manual.

Create any Domain Aliases

You may alias any domain that you own to your LMS instance. For example, if you find that “bobsonlineuniversity.com” is available, and you register it, you may alias that domain to your LMS. In the Administration menu, open the “System” folder, then open the “Domain Aliases” folder and enter your aliases. Complete details can found in the Inquisiq R3 System Interface and Configuration manual.

Create your Email Notifications

If you plan to automatically notify users, supervisors or the system admin of certain events that have happened or are about to happen via email, you will want to setup your email notifications. In the Administration menu, open the “System” folder, then open the “Email Notifications” folder and build all of your notifications. In this area, you will be setting both the email trigger along with the actual message. Complete details can found in the Inquisiq R3 System Interface and Configuration manual.

Configure any API accesses

Since Inquisiq R3 is a web application, it can communicate with other web applications via the built-in API. The most common use of the API is “single sign-on”. Since the API is considered custom programming, the use of the API is not covered in the standard support agreement. In the Administration menu, open the “System” folder, then open the “API” folder and configure your API accesses. Complete details can found in the Inquisiq R3 System Interface and Configuration manual along with the Inquisiq R3 API Reference manual.

The Final Step before going Live – Input your Users

After you have configured everything in your LMS, you are now ready to put your users in the system and start using it as an LMS. If all your users join through “Self Registration”, you are done. If you will be putting your users in the system individually, via a batch upload or other synchronization method, you will do that now. If everything was configured correctly, all of your new users should be automatically put into their correct groups, be enrolled in the appropriate courses, be assigned their private catalogs, and receive emails notifications on these events. To input users individually or by a batch upload, in the Administration menu, open the “Users and Groups” folder, then open the “Users” folder and select your user input method. Complete details can found in the Inquisiq R3 Users and Groups manual.