



The FlexTraining Total E-Learning Solution

Management Guide Version 6.0

Overview

FlexTraining is a web-based training solution for building and delivering education over an Intranet or the Internet. It is a complete framework for structuring and conducting training classes of virtually any length or substance.

FlexTraining gets its name from its high level of adaptability. It may be configured in a variety of ways. Instructors are optional, Discussion Forums are optional, and each course can have a user-defined number of Sections, Tests, Assignments, and Course Guide chapters. Use of the Virtual Document Libraries feature is also optional.

FlexTraining is built on the concept of customer-defined training content. It provides a framework for constructing and administering training classes of almost any type. For example, if your users all have video plug-ins in their web browsers and fast network connections, your content can be loaded with video. If all students will have Audio or Shockwave plug-ins, these types of content are allowed as well.

If, on the other hand, your audience will access the training facility through modem connections over the public Internet, you might choose to use HTML and images only, for faster response time and greater compatibility.

FlexTraining consists of two separate applications, both sharing a common database:

Management Center:

Set system configuration values, establish policies, define courses, tests, and assignments, build course guide, schedule classes, assign instructors, approve enrollments, run reports, and monitor classes. Management Center is also used to define Dynamic Messages and to author training content.

Student Module:

Register for a class, sign on to your class, view course content, navigate through (or download) the course guide, receive assignments, take online tests, track your progress online, make entries in a personal Course Notebook, or jump to the Discussion Forum.

The two applications share student and class data, but each has its own separate address on the web server and its own separate security. The installation procedure installs both modules.

System Requirements

FlexTraining runs on a Windows 2000 Server or newer, with Internet Information Server, version 4.0 or newer.

Server Requirements:

- Microsoft IIS Server 5.0 or better
- Windows 2000 Server or newer, 32 bit (x86)
 - FlexTraining will not function on 64 bit servers
- .NET Framework version 3.5; download available here:
 - <http://www.microsoft.com/downloads/details.aspx?FamilyID=333325FD-AE52-4E35-B531-508D977D32A6&displaylang=en>
- ASP.NET State Server active in the Services panel
- MS Access of SQL Server DBMS with ODBC Drivers (recommend MS Access)

Recommendation: Complete software installation and testing in MS Access prior to migrating to SQL Server.

- Internet/Intranet connectivity depending on expected student/user volume

Management and Student (Browser) Requirements:

- Any forms-capable and table-compatible web browser, at least Microsoft IE 5.0 for Management Center
- Email Client and (optional) News Reader for Online Discussion Forums
- Windows, Mac, or UNIX computer with Internet or Intranet connectivity at 56 Kbps or faster
- Management Center is designed to work best with Internet Explorer.

Installation

FlexTraining installation is very simple, consisting of three steps:

1. Install software from CD
2. Perform manual server setup tasks
3. Verify Installation

Step 1: Install software from CD

At the web server machine, sign on as a member of the Administrators Group.

Run the program FlexTraining60_setup.exe on the FlexTraining Installation CD (if your CD ROM Drive has the auto run capability, the setup program will start by itself). When prompted for a directory to install to, choose any directory on the server. It is a good idea to create and use a target directory such as "d:\FlexTraining6.0" or "e:\FlexTraining6.0."

You may decide to choose the directory called /InetPub/wwwroot on the drive where the web server is. That directory is called the Web Server "Document Root." However, you may install the FlexTraining software on any drive and directory you wish. When the process is complete, you have completed Step 1. You may remove the Installation CD from the CD ROM Drive.

Step 2: Perform manual server setup tasks

Below the directory to which you choose to install, you should have the following directories:

```

FlexTraining
Database***
FlexTraining
    ASP *
        App_Code
        App_Data
        Bin
        Certificates
        Content **
            FT_Libraries
            css
            Exported_Courses
  
```

SCORM
sections

System
Audio
AT_items
Certificates
Hot_spot_images
Backgrounds
Video
images
Flash_Movies
Logos
Photos
guide
assignments

Temp
Images
Flags
Instructor-Bios

Controls
Custom
Help
images
styles
Syllabus
TempFiles**

Images

FlexTrainingAdmin *

Authoring_Tool
Certificates
Cgi
Flexdocs
FlexdocsUpdate
FTChat
FTMB
Images
Instructor**
Interface
Ocx
reporting
TempFiles**

* These are the directories pointed to by your Virtual Directories. They are the actual "home" directories for the three modules.

** The ftAdmin/TempFiles, ASP/StudentNotes directory, the ASP/content/guide directory and the ASP/content/assignments directory all must have **Write** permission set for the Internet Web Server Account, since files may be created here during the class definition process. Your system administrator should be able to use the Windows Explorer to set permissions for any given directory.

*** **The database directory needs to have read, read & execute, write and modify permissions set on the database in order to work properly.**

a. Set Up Virtual Directories

First, right click on your website and choose properties. Click on the ASP.NET tab and make sure that ASP.NET version 2 is chosen from the list and save. The directories marked with an asterisk (*) are the two Application Directories. You should set up a Virtual Directory for each of these Application Directories, using the Internet Service Manager application that comes with the Web Server.

Set up a Virtual Directory for the two applications, making sure you set "Read and Execute" permissions for each. Also, make sure the Default Document (under "Documents") is set to "default.asp" for the Management Center Module and default.aspx for the student module.

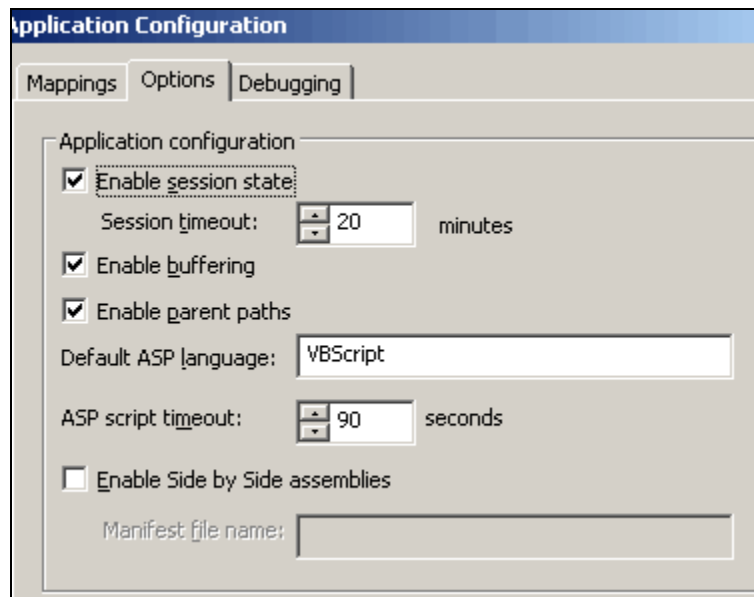
	Virtual Directory Name (alias)	Referenced Location
1	Any Name (suggest "FT")	FlexTraining/FlexTraining/ASP (Student module Application Directory)
2	Must be "FlexTrainingAdmin"	FlexTraining/FlextrainingAdmin (Management Center Application Directory)

Next, we will tell the IIS server that it's okay for the administrator to see what files are available in the server's content area to help the administrator in building courses. Using the Internet Service Manager: Locate the directory called "Content" just under your **FlexTraining Virtual Directory** (may be named "FT" or "FlexTraining"). Then:

1. Right click on the "Content" directory.
2. Choose Properties.
3. Place a check in the "Directory Browsing Allowed" box.

Now that your Virtual Directories are set up, be sure to Enable parent paths in your FlexTraining Admin folder.

1. In IIS, right click on the Virtual Directory for FlexTraining Admin and choose “Properties”.
2. Go to the Virtual Directory tab and click on “Configuration”
3. Click on the “App Options” or “Options” tab and select the box for “Enable parent paths”.



b. Set Up Directory Security

All the directories in FlexTraining version 6.0 should have anonymous access (read/write/execute) permissions given to the IUSR_MachineName account and ASP.NET machine account, with the exception of the directories noted on page 7.

c. ASP-based Uploading Steps

NOTE: If you are using Windows 2003 Server, you will need to change the metabase for ASPMaxRequestEntityAllowed entry. The default value is approximately 200k, but you can set it to the maximum size necessary for your environment.

d. Set Up an ODBC Source

FlexTraining uses ODBC to connect to the database in the Management Center. Before you can run any of the FlexTraining modules, you must define an ODBC Source on the Web Server machine. Please make sure this matches the DB_String_inc.asp file.

1. Open the Control Panel, click on Administrative Tools and Select the "Data Sources/ODBC" icon.
2. Click on System DSN.
3. Click on Add.
4. Select the Microsoft Access Driver (or SQL Server) and click on Finish.
5. Enter Flextraining6 as the data source name.
6. Enter a description, such as "FlexTraining database."
7. Click on the Select button.
8. Choose the Flextraining6.mdb file in the directory FlexTraining/database.
9. Close each dialog box by clicking on OK.
10. Repeat steps 1 through 9 but enter FT60MB as data source name and the choose FT60MB in the directory FlexTraining/database for step 8.
11. In the Student Module, you must open the file called Web.config using a text editor like Notepad or FrontPage. Find the entry for the Database Path and modify it to match the correct physical path on your server to the FlexTraining6.mdb file.

e. Register Graphing Tool (An Optional Step)

FlexTraining includes an Instant Performance Graphing feature in the Management Center. It instantly graphs test performance, plotting class averages against your defined passing scores.

If you plan to use the graphing feature, you need to "register" the graphing tool on the server, as follows:

1. Locate and identify the graphing tool "teechart.ocx" file in the directory "OCX" under your FlexTrainingAdmin directory.
2. Note the full path to this file. For example, if you installed FlexTraining on the Server's D drive: d:\inetpub\wwwroot\flextrainingadmin\ocx\teechart.ocx.
3. At the server, either open the Run box (Click on Start/Run) or go to DOS mode and type the following command.

Regsvr32 fullpathToYourOCXfile:

For example:

Regsvr32 d:\inetpub\wwwroot\flextrainingadmin\ocx\teechart.ocx

If you are unable to register the TeeChart OCX file (which may be the case if a third party is hosting FlexTraining for you, for example), FlexTraining will still operate normally. The ONLY feature you will not be able to use is the Performance Graphs feature on the FlexTraining Management Center menu.

f. Register FTControls_5_3.dll

FlexTraining includes a FTControls_5_3.dll file that automates certain features in FlexTraining. Version 6.0 still uses the 5.3 version of this controller for management side activities. The student side has its own controller that does not need registering.

You need to "register" the **FTControls_5_3.dll** on the server, as follows:

1. Locate and identify the FlexControl.dll file in the directory "CGI" under your FlexTrainingAdmin directory.
2. Note the full path to this file. For example, if you installed FlexTraining on the Server's D drive: `:\inetpub\wwwroot\flextrainingadmin\cgi\FTControls_5_3.dll`.
3. At the server, open the Run box (Click on Start/Run), or go to DOS mode and type the following command.

```
Regsvr32 fullpath To Your FTControls_5_3.dll
```

For example:

```
Regsvr32 d:\inetpub\wwwroot\flextrainingadmin\cgi\FTControls_5_3.dll
```

Step 3: Set Up Your Management Center Login

The first time you access the Management Center, the login is set to the system default:

Login: Admin

Password: default

This login is for first time use and should be changed immediately for your own security. You may change your login by going to the User's Menu. Click the pencil icon by Admin to change the login.

Step 4: Verify Installation

Please note the Virtual Directory names you used in the last step. Those names, when combined with your server's fully-qualified name, will become the URLs (addresses) for the three applications.

For example, if your server's Host Name is "train" and your domain is "mycompany.com," then the address for the FlexTraining Management Center is:

<http://train.mycompany.com/FlexTrainingAdmin>

And the address for the Student module is:

<http://train.mycompany.com/FT>

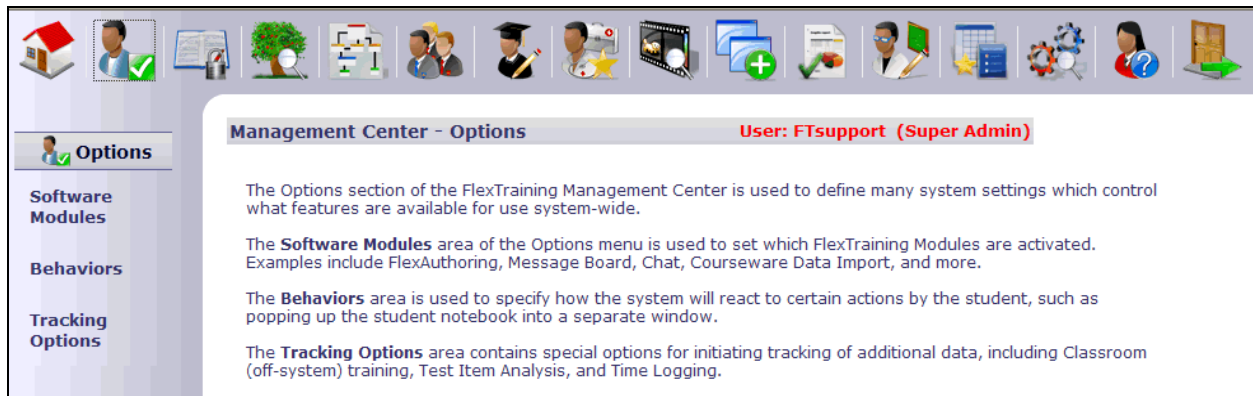
Students use this address to SIGN UP for classes as well as participate in each class once they are enrolled.

Verify Installation

Access the FlexTraining Management Center at:

<http://train.mycompany.com/FlexTrainingAdmin>
(Use your actual host and domain name.)

Choose the second button on the screen, the “Options” button. You should see a page displayed on the screen that resembles the following:



If you see a screen like this one, you have successfully installed FlexTraining’s Active Server Pages and database. If you don’t, recheck the preceding steps in the installation procedure.

Tuning Your "Time Out" Settings

ASP applications, such as FlexTraining, maintain information about each user in what is called a "Session Object." The Session Object remembers things like who you are, what you are doing and the name of the database with which you are working. A separate Session Object is maintained for each user each time they access any FlexTraining module.

The IIS Web Server, not FlexTraining, creates and maintains all Session Objects. If you are inactive (you don't change screens or click on any links) for a period of time, the server erases your Session Object in order to free up memory for someone else to use. When this happens, it is called "Timing Out."

How long does the Web Server wait before timing someone out? Well, that's up to you. You can set the timeout value, in minutes, for each application on your system, including FlexTraining's Student module, Instructor module and Management Center. The default value in the server is usually 20 or 30 minutes, but you can change the setting if you find that too many users are "timing out."

For example, some administrators find that the system times out when they are defining test questions and answers in the Management Center. As a result, they will go and adjust the timeout value for the Management Center to a higher number.

To Change the Setting for a Given Application: (These instructions are for IIS version 5.0. They may vary slightly for newer versions of the Web Server).

1. Open the Microsoft IIS Management Console (Internet Service Manager) and locate the Virtual Directory you have established for the module you are interested in (ex: FlexTrainingAdmin). The Virtual Directory names are normally highlighted in blue.
2. Right-click on the Virtual Directory name, choose Properties, choose the "Virtual Directory" tab and then click the "Configuration" button near the lower right.
3. Choose the App Options tab and then find the Session Timeout field. Set this value and then click OK until all dialogue boxes are closed. Be careful if setting a value much more than 45-60 minutes, since keeping the Session Objects alive for too long wastes memory and could slow the server down.

Changing Database Management Systems

FlexTraining is shipped with an MS Access database. For most customers and situations, you should use MS Access as your database Management System throughout the life of your training system. It is very easy to use, it is portable so that you may easily move it to a new server if you need to and it supports a large volume of activity. Even though it is called a "desktop" database, Access works quite well with FlexTraining in a network/internet environment.

It is recommended that you initially set up FlexTraining using MS Access, do a quick run through to make sure that everything is working properly and then migrate to MS SQL. This will help troubleshooting immensely if any issues arise.

If you have decided, due to very high usage or a corporate standard, to move the data to MS SQL Server, you can do so very easily. In summary:

1. Migrate the data from Access to SQL Server using one of the Microsoft-supplied data migration tools, either upsizing from Access or importing into SQL Server.
2. Edit the file called "DB_String_inc.asp" in your FlexTrainingAdmin directory, your Flextraining/ASP directory. In each file, simply change the connect string to match your database manager, your database name and your database ID and Password, if required. YOU MUST EDIT THE CONNECT STRING in both the DB_String_inc.asp file in the Management Center and the web.config file in the Student Module asp folder.
3. These files contain template strings that are very easy to edit. It's really just a matter of commenting and un-commenting a couple of lines of code and editing the Database Login information.

After making the edits, you can restart (open any module from a new browser session) the FlexTraining Modules and they will connect to the new database.

If you have problems, contact your Network or Database Administrator.

NOTES:

1. *If you do not have sufficient technical and database (SQL Server) expertise internally to migrate a set of tables from Access, then by all means, you should consider keeping the data in Access. Most FlexTraining customers leave their data in MS Access permanently. Those who do not feel comfortable migrating to SQL Server and managing a SQL server database will need to keep their data in Access. FlexTraining code supports SQL Server, and has been tested with it.*
2. *Our database structure has been carefully and intentionally designed to not include validation logic, data relationships, and even record keys within the database, so there is no "Schema" to migrate, only tables to copy. That keeps migration very simple.*
3. *Sometimes when you copy database tables from Access to SQL Server, SQL Server fails to properly set up the auto-increment fields. These are fields that automatically set their own value (a counter) whenever a new record is added. You will want to verify that for every table, the field called "ID" is set to be an auto-increment field in SQL Server. The one exception to this is the Course Definition table, where the auto-increment field is called "Course_Def_Number." Within SQL server, you can use the table management interface in the Enterprise Manager (GUI) to set the auto-Increment flag for these special fields.*
4. *Sometimes when you convert your data to SQL Server, the online tests with FlexTraining will have errors. If this happens, you can easily resolve the errors by making data type changes within SQL Server: In the Test_Detail table, set the Type for field "Question" to "nvarchar" and the length to be any number up to 4000 (depending on the length of your questions). You will also want to set the Type for field "Rationale" to "nvarchar" and the length to be any number up to 4000 (depending on the length of your rationale). In the Classes table, make sure that the Type field for "Syllabus_Address" is set to "nvarchar." You can set this length to be 255 characters (or more) and this will alleviate the need to have shorter Syllabus URLs.*
5. *For issue resolution and ease-of-support, MS Access is the preferred database for FlexTraining.*

Operating the Management Center

The Management Center gives you complete control over the structure and flow of each class offered. It lets you configure system behavior, course content, class scheduling, student signup and use of optional features such as the Message Board and the Instructor module.

All setup, definition and course management functions may be accomplished through the administrator buttons.

Recommendation: Run the “set-up check” on the Management Center Home Page or in the Utilities Menu regularly. Running the “set-up check” will alert you to a variety of potential errors, such as incomplete courses, missing student data, and other data integrity issues.

Concept: “Course” vs. “Class”

A **Course** is a collection of definitions and material, such as content sections, a course guide, tests, and optionally, assignments. A course is not scheduled and has no instructor(s) or students.

When a course is scheduled (placed in the Course Catalog) it becomes a **Class**. A Class may be thought of as an instance of a Course. One Course may be offered several times, and therefore several classes may be built on the same Course.

A Class has Start and End dates and may have an Instructor. Students may enroll in a Class once it is placed in the catalog. From then on, all Student activity is associated with that Class.

Courses and Classes are both defined from the Management Center menu. You create a Course under the Course Builder option, and you create a Class under the Scheduling Wizard option.

Options Menu

Software Modules

The system allows you to customize and configure your e-Learning environment without programming. Your setup options are organized into related groups and are placed under the appropriate menu item. Make selections, save your changes and jump between option groups as needed.

Enable Content Authoring Tools

Indicate whether or not you will be using the built-in FlexTraining Authoring Tool. Enter "Yes" if you wish to activate the Authoring Tool. This selection affects certain screens during course building.

Enable Media Library Objects

Indicate whether or not you will be using FlexTraining Dynamic Messaging windows. This is used primarily in conjunction with page authoring and interactive "hot spots."

Enable FlexAuthoring

Choose "Yes" if you have licensed the FlexAuthoring Premium Content Authoring module. System will check your run code to verify licensing and then activate FlexAuthoring.

Activate Skills Tracking

Set to "Yes" to activate the Skills and Skill Group tracking features. Set to "No" if no tracking is required for courses and Skill Groups.

Activate Virtual Document Libraries

If you have electronic images you want to make available within the Student and Management Center modules, set to "Yes." If set to "No," there will be no mention of these features in the Management Center and Student modules screens.

Enable Message Board

Set to "Yes" or "No." If "Yes," the Control Panel will contain a button for accessing the Message Board for the class the student is signed onto.

Enable Chat Room

Set to "Yes" or "No." If "Yes," the Control Panel will contain a button for accessing the Chat Room for the class the student is signed onto.

Courseware Data Importing

Import third party courseware data records. Rarely used.

PPT to Flash Converter

Set to “Yes” or “No.” If “Yes,” this integrated feature will convert PowerPoint slide shows into Flash, dramatically speeding up the online delivery of your dynamic training files and eliminating the need for your students to have PowerPoint on their computers.

Question	Yes	No
Would you like to use Content Authoring Tools?	<input checked="" type="radio"/>	<input type="radio"/>
Would you like to enable the Media Library?	<input checked="" type="radio"/>	<input type="radio"/>
Would you like to enable FlexAuthoring?	<input checked="" type="radio"/>	<input type="radio"/>
Would you like to use Skill Groups?	<input checked="" type="radio"/>	<input type="radio"/>
Would you like to enable Virtual Document Libraries?	<input checked="" type="radio"/>	<input type="radio"/>
Would you like to enable the FlexTraining Internal Message Board?	<input type="radio"/>	<input checked="" type="radio"/>
Would you like to enable the FlexTraining Internal Chat Room?	<input type="radio"/>	<input checked="" type="radio"/>
Would you like to enable the Courseware Data Import Tool?	<input type="radio"/>	<input checked="" type="radio"/>
Would you like to use the PPT to Flash Converter (requires installation of FlashSpring SE)?	<input checked="" type="radio"/>	<input type="radio"/>

[Save Changes](#)

Behaviors

Enable External Collaboration Tool (Discussion Forum)

Set to "Yes" or "No." If "Yes," the Control Panel will contain a button for accessing a Discussion Forum for the class the student is signed onto.

Show Skills Tracking Information

Set to "Yes" or "No." If "Yes," the Skills Box will be available for student use.

Allow Students to View a Catalog

Set to "Yes" or "No." If "Yes," the Catalog will be available for student use.

Allow Students to Use Course Finder

Set to “Yes” or “No.” If “Yes,” the Course Finder will be available for student use.

Allow Students Create/View Task List

Set to “Yes” or “No.” If “Yes,” the student can create their own Task List.

Allow Students to View the Class Calendar

Set to “Yes” or “No.” If “Yes,” the Class Calendar will be available for student use.

Allow Students to View/Change their Personal Profile

Set to “Yes” or “No.” If “Yes,” the student may modify their address and personal information.

Show Student a Demonstration Upon First Entry

Set to “Yes” or “No.” If “Yes,” upon entering the student module for the first time, the student will see a popup flash tutorial to instruct the proper use of FlexTraining.

Show Setup Alerts on Management Center Home Screen

If you have a large number of courses and classes and notice a delay in the opening of your Management Center Home Screen, setting this to “No” may speed up the load.

Allow Setup Alert Counts on the Management Center Home Screen

Set to “Yes” or “No.” If “Yes,” a link to the alerts and licensing monitor will appear on the management center home screen.

Prevent Session Timeouts

The main purpose of this option is for overriding the asp session timeout if Windows Server does not accept your changes in IIS.

Windows Media Player

Displays Stop, Rewind and Play buttons when students view .wmv movies.

Option	Yes	No
Would you like to enable the External Collaboration Tool?	<input checked="" type="radio"/>	<input type="radio"/>
Would you like to show Skills Tracking information on each student's home page?	<input checked="" type="radio"/>	<input type="radio"/>
Would you like to allow students to view a catalog of all classes that they are allowed to take?	<input checked="" type="radio"/>	<input type="radio"/>
Would you like to allow students to search for available classes using the Course Finder?	<input checked="" type="radio"/>	<input type="radio"/>
Would you like to allow students to create/view their own task list?	<input checked="" type="radio"/>	<input type="radio"/>
Would you like to allow students to view the Class Calendar?	<input checked="" type="radio"/>	<input type="radio"/>
Would you like to allow students to view/change their Personal Profile?	<input checked="" type="radio"/>	<input type="radio"/>
Would you like to force a popup demo onto students upon their first entry into the student module?	<input type="radio"/>	<input checked="" type="radio"/>
Would you like to display setup alert counts on the Mgmt Center Home Screen?	<input checked="" type="radio"/>	<input type="radio"/>
Automatically prevent session timeouts? (If you choose Yes, both FlexTraining modules - Student and management - will not "time out" even after long periods of inactivity)	<input checked="" type="radio"/>	<input type="radio"/>
If the system is not set to automatically prevent time outs, after how many minutes should a session timeout occur? (Only matters if you answered No the option above)	<input type="text" value="45"/>	
Would you like to show the video control bar on Windows Media Player videos in the Authoring Tool?	<input checked="" type="radio"/>	<input type="radio"/>
Would you like to show the audio controls in the Navigation on Windows Media Player videos in the Authoring Tool?	<input checked="" type="radio"/>	<input type="radio"/>

Save Changes

Tracking Options

Track Classroom (Off-system) Training

Set to "Yes" or "No." Set to "Yes" if you also plan to track training classes that are not conducted on this training system. In other words, "Classroom Training." Set to "No" if you are only tracking classes offered through FlexTraining.

Allow Item Analysis

Set to "Yes" or "No." Set to "Yes" to activate DETAILED logging of each test question and answer by each student, which is necessary for Item Analysis Reporting. Use with caution as it creates MANY database records.

Enable Time Logging

Set to "Yes" or "No." Set to "Yes" to activate DETAILED logging of student activity (i.e., access to course material and test records).

Disable Right-Click

Set to "Yes" or "No." Set to "Yes" to prevent students from easily viewing the source code of their courses. This helps prevent theft of course materials like SWF files that are meant to remain private.

Enable Management Center Access Logging

If you wish to log all critical activity happening in your Management Module, turn this feature on. If you have more than one Management Center user, it is recommended that this setting be turned on.

Tracking Options

Would you like to track Classroom Training (off system)? Yes No

Would you like to enable Item Analysis? Yes No

Would you like to enable Time Logging? Yes No

Would you like to Disable the student's ability to right-click when viewing course content? Yes No

Management Access Logging type:

Off - No Management Access Logging
On - Logs Logins/Logouts and changes to Policy/Options/Environment/Users

Policies Menu



Management Center - Policies User: FTsupport (Super Admin)

The Policies menu provides a means for setting certain rules for how a Manager or a student will access your FlexTraining Environment.

The **Registration & Login Policies** screen allows you to set a default status for all new enrollments. It also lets you specify whether a student who is logged in should be prompted for his/her Name, e-mail Address, or for a unique value like an employee number or Social Security Number.

The **E-Commerce** settings screen is for companies who want to use e-commerce to accept payments from their students for training. You can set up your Merchant account and/or your PayPal account by entering your account information.

The **Promo Codes** settings screen is used to manage promotional codes. These promotional codes will provide alternative pricing to students for the specified class.

Registration and Login

Set Enrollment Status for New Students

Enter the status to which new student's enrollment will be set. If it is set to "Active," students may sign on immediately. If set to "Pending," the Administrator must approve enrollment before student can sign on. Use "Payment" to require credit card processing.

Allow self-registration for first-time students

Set to "Yes" or "No." "Yes" enables students to register without administrative approval.

Collect Student Demographic Information

Set to "Yes" or "No." If "Yes," designated demographic information will be collected in student profiles.

Use Time Limited Subscription Enrollments

Set to "Yes" or "No." This function works like a subscription where students would have access for a set period of time.

Define Default Enrollment Subscription Period

Determine the length of subscription that will be available.

Use Due Dates on Classes

Set to "Yes" or "No." This function establishes class access for a set period of time.

Define Default Class Due Period

Determine the length of time that the class will be available.

Decide How Learners Access the Student Environment

Choose from email address or unique ID.

Registration and Login

Would you like students to be automatically enrolled (Active), require administrator approval for enrollments (Pending), or be enrolled upon processing payment (Payment)?

Allow self-registration for first-time students? Yes No

Would you like students to collect demographic information in students' profiles? (race, gender, birth date, educational level) Yes No

Subscriptions

Use Time Limited Enrollments (subscription style)?

Select Default Enrollment Subscription Period:

OR

Due Dates

Use Due Dates on Classes?

Select Default Class Due Period:

I want my online learners to access the student environment by: 1. Entering his/her Email Address 2. Entering his/her Unique ID

E-Commerce

In order to process credit cards, you need to have an account with an online clearing house. Basically, a clearing house offers a service that approves or declines the credit card that is sent to them electronically via FlexTraining.

Setup

This will require system settings to be entered within the E-Commerce section of the Policies Menu.

The clearing house that you have chosen will give you specific information relating to your account with them. This should include, but is not limited to, a username, password and gateway URL.

Enter the above information in the corresponding E-Commerce Account, Login and Password input boxes.

Once these few changes have been made, you will want to verify that the names and values are set up to your Clearing House specifications. Then you are finished with this page.

FlexTraining has an electronic form already created (Payment.aspx). When a student registers for a class, this page posts to the payment gateway, and the gateway responds with the approval or decline directly to that same page (Payment.aspx).

Use the E-Commerce section to specify how you will process credit cards.

E-Commerce Payment Type(s)

Choose the type of payment that you would like to accept.

E-Commerce Account

Enter account name or number in the input box.

E-Commerce Login

Enter e-commerce account login.

E-Commerce Password

Enter e-commerce account password.

E-Commerce Transaction Key

Enter your Authorize.net Transaction Key.

PayPal Account

If you would like to enable students to pay for classes using their PayPal Account, enter your Business PayPal Account.

E-Commerce Test Mode

Set to "On" or "Off." If "On" is selected, transactions will be simulated but not sent to the bank. If "Off" is selected, transactions are live and will be submitted for processing. This function does not apply for PayPal transactions.

NOTE: Tuition information is covered in the Courses Menu section under the Class Schedule Wizard.

Promo Codes

Add a Promo Code

Entering a promotional code requires a code name, class selection, promo code, price, start date and expiration date. Promo codes offer percentage-based promo codes and discount pricing to students who enter the code when enrolling in a course.

Code Name	Class	Promo Code	Price or Discount	Start Date	Expire Date	Actions
Early10	FlexAuthoring Demo (narrated)	EARLYREG	10% off	1/19/2009	3/19/2009	
SkillSet	FlexTraining in a Nutshell	SKILLSET	\$50.00	1/19/2009	4/19/2009	

Add New Promo Code

Required Fields Manager

Required Fields Manager

The field options for the student profile may be selected from this screen. If you elect to enable Demographics, each demographic field can be turned on and off individually on this page.

First Name, Last Name, User Name (Unique ID), Email and Password are always required and are always shown in the student profile. Please note: if Demographics is disabled in your system, all other fields may be turned off and will not show in student's profile regardless of the settings on this page.

Profile Field	Required field?	Show this field in profile?***
Organization	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Location	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Department	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Job Title	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Address Line 1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Address Line 2	<input type="checkbox"/>	<input checked="" type="checkbox"/>
City	<input type="checkbox"/>	<input checked="" type="checkbox"/>
State	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Zip Code	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Country	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Phone Number	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Display Date Format		<input checked="" type="checkbox"/>
Gender	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Race	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Educational Level	<input type="checkbox"/>	<input checked="" type="checkbox"/>

First Name, Last Name, User Name (unique id), Email, and Password are always required fields and are always shown on profile.

*** Please note that if Demographics is disabled in your system, demographics fields (i.e., race, gender, educational level) will not show in student's profile regardless of the settings on this page. If Demographics is enabled in your system, each demographic field can be turned off individually on this page.

Save Required Field Settings

Demographics

Student Demographic Tracking

Student data fields are available for organizational demographic tracking and reporting. This constructive feature includes an on/off option to capture the desired level of preferred, statistical analysis. The fields include Race, Gender and Educational Level, and may be modified as needed. Three additional Generic fields are available for customization. These fields may be turned on/off in the Required Fields Manager.

Race		Actions
White		
Hispanic		
Black		
Native American		
Eskimo		
Asian		
Add New Race		

Gender		Actions
Male		
Female		
Other		
Add New Gender		

Educational Level		Actions
High School Diploma		

Environment Menu

Management Center - Environment User: FTsupport (Super Admin)

The Environment screen is where you tell FlexTraining about your learning system environment. This important area must be configured properly for all functions to work properly throughout FlexTraining.

The **Training Environment** screen is used for quickly customizing your installation with your own logo, company name and site name, along with other options.

The **System Environment** area is used to assign technical information such as your server URLs to your Admin and Student Modules, the physical path to the Student Content directory, your IP address, your Run Code, and your database manager. Your System or Network Administrator should be able to supply this information.

Training Environment

Enter Company Name

Enter your company name.

Name Your Training Environment

Enter the name for your training facility, organization, company or site. This will be used on various screens.

Enter Company Logo/Banner Image

You may upload a company logo or banner image for the training environment.

Select a Login Image, Login Text or Both

Choose an image to display on the login pages in your admin and student modules. If you choose only text, the image will display in the admin module but not the student module. The text will appear in the student module only.

Select an Image for Login Pages

Choose an image to display on the login pages in your admin and student module.

Enter Text for Login Pages

Enter text that will appear in your student module.

Enter Email Address for Your Training Administrator

This is the Email address of the system or course administrator. Mail will go to this address if a student clicks the Email Administrator link.

Group Related Courses

You are able to group related courses. Specify if you want to use a term other than "group."

Assign Levels

You are able to assign levels to courses. Specify if you want to use a term other than "level."

Environment

Training Environment

System Environment

Mail Settings

Email Target Matrix

Training Environment

Enter your Company Name ⁱ FlexTraining Solution Center

Enter a Name for your Training Environment ⁱ FlexTraining Solution Center

Enter a company logo/banner image ⁱ flextraining_tels.gif [Show](#)

Would you like to use an login image, login text, or both Image Text Both

Select an image to use on the login pages ⁱ conference_room_uplink_ha.gif [Show](#)

Enter Text to use on the student login page ⁱ

What is the Email Address for your Training Administrator? ⁱ help@flextraining.com

FlexTraining allows you to group related courses. If you wish to use a term other than "group", enter that term here. ⁱ Group

FlexTraining allows you to assign levels to your courses. If you wish to use a term other than "level", enter that term here. ⁱ Level

[Save Changes](#)

System Environment

Enter Full URL to Your Student Module

Enter the full URL for your Student Module, as installed. Include Domain, host name and directory where the application lives.

Enter Full URL to Your Administration Module

Enter the full URL to the FlexTraining Management Center module. Normally it is your server's URL followed by "FlexTrainingAdmin."

Enter Full URL to Your Training Content Directory

Enter the full URL to the root of all course content. Other directories are created under this directory during the Install to hold course material, notes, assignments, etc.

Enter Disk Path to Your Training Content

Enter the full path to the root of all course content. Other directories will be created under this directory to hold course material, notes, assignments, etc.

Enter Full URL to Your Message Board

Enter the full URL to the FlexTraining Message Board directory.

Enter Full URL to Your Chat Room

Enter the full URL to the FlexTraining Chat Room directory.

Enter IP Number of Your Web Server

Enter the IP # for the web server on which you are running. This number is used for various internal system calls. Student Module will not run properly without a correct IP # entered here.

Enter Run Code (based on Server IP Number)

Enter entire Run Code EXACTLY as issued for your specific software license. If you move FlexTraining to a new server, you MUST obtain a new Run Code.

Enter Run Code Expiration Date

Enter the Run Code expiration date.

Define Default Date Display Format

Set the date configuration to reflect the preferred, local date display format.

Select Database Manager

Set to "MS Access" if using MS Access as your database. Set to "SQL Server" if using MS SQL Server as your database software. Impacts some internal formatting of database cells for date-related operations.

Select Time Zone Offset

This sets the FlexTraining server to match student time, not server time, if applicable.

System Environment

Enter the full URL to your Student Module

Enter the full URL to your Administration Module

Enter the full URL to your Training Content Directory

Enter the Disk Path to your Training Content

Enter the full URL to your Message Board Directory

Enter the full URL to your Chat Directory

Enter the IP Address of your Web Server
Should be: 24.73.167.188

Enter the Run Code assigned to you by your FlexTraining representative
(based on IP Address)

Run Code Expiration Date
(do not modify unless directed)

Default Date Display Format

Which Database Manager are you using? Microsoft Access SQL Server

Select the number of hours to adjust the time

Server Local Time:
9:37:24 AM

Adjusted Display Time:
9:37:24 AM

Mail Settings

Choose Mail Service

Select the mail service that you would like to use with your FlexTraining Software. When using a Windows 2003 Server or better, you must choose either CDO or Remote SMTP. CDO is the recommended choice.

Enter Remote SMTP Server

Remote SMTP allows you to connect to your own privately run mail server located on a different system than the FlexTraining installation. Enter the web address of this external server here.

Select Remote Security Type

Security Type is the type of login access required to use the remote SMTP mail server. The three options are: 1) Anonymous, which is the least secure method of connection, 2) Basic, which sends the password in clear-text format, and 3) NTLM, which is an encrypted password format. You will need to use the format that is dictated by your Remote SMTP server's configuration.

Enter Remote SMTP Login

If you choose Basic or NTLM for the Security Type setting, you must specify a login name here.

Enter Remote SMTP Password

If you choose Basic or NTLM for the Security Type setting, you must specify a password here.

Select Remote SMTP SSL

If your remote SMTP server requires the use of Secure Socket Layers, specify "Yes" here.

Environment

Mail Settings

Mail Settings

Choose a Mail Service to use: CDO Remote SMTP

If you chose Remote SMTP, enter the following data. If you didn't chose Remote SMTP, leave these fields blank.

Remote SMTP Server:

Remote SMTP Security type: Anonymous Basic NTLM

Remote SMTP Login:

Remote SMTP Pwd:

Remote SMTP Server uses SSL?: No Yes

Save Changes

Email Target Matrix

The Email Target Matrix designates various online training events, such as registration, course completion and test results. Establishes email target settings for administrators, class instructors, students and other interested parties. The “Course Reset” selection ensures that email notifications are automatically sent to designated recipients if the administrator uses the gradebook to reset a student’s progress or changes the course completion status from complete to incomplete.

Event	Send Email to Administrator	Send Email to Class Instructor	Send Email to Learner	Send Email to christine@flextrainin	Send Email to Learner's Manager
Registration by Learner	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Registration by Admin	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Enrollment by Learner	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Enrollment by Admin	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Edit Profile by Learner	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Edit Profile by Admin	<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Unenroll by Learner	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Unenroll by Admin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Course Reset	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Course Passed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Test Passed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Test Failed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Skill Group Warn	<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Organization/Hierarchy Menu

Management Center - Organization User: FTsupport (Super Admin)

You may define your own unique organizational hierarchy, where there are multiple levels of users. A hierarchy of 1-4 levels is used to determine what data each user can access.

There are a couple of one-time setup tasks you have to do. They include setting the number of levels in your management hierarchy, the names of each level, and the entities within each level.

You may return to these sections at any time to add new values to a level or change the terminology used for each level. **If you have any doubt as to what structure to choose, you should select a Flat structure.**

If you wish to revert to a flat organization, click on the "Edit Structure" link in the Org Menu to the left.

You may define your own unique organizational hierarchy where there are multiple levels of manager, authors and other users of the Management Center. A hierarchy of 1 to 4 levels is used to determine what data each user can access.

There are a couple of one-time setup tasks you must do. They include setting the number of levels in your management hierarchy and entering the names of each level, plus the entities within each level.

You may return to these sections at any time to add new values to a level or to change the terminology used for each level. If you have any doubt as to what structure to choose, you should select a Flat structure.

If you wish to revert to a flat organization, click on the "Edit Structure" link in the Organization Menu to the left.

Hierarchy & Terminology

To setup your hierarchy, use the "Hierarchy & Terminology" item from the left-hand navigation.

The following screen will appear, allowing you to setup the hierarchy.

Hierarchy and Terminology

Select the number of desired levels in your hierarchy:
 1 2 3 4

Organization Terminology User: FTsupport (Super Admin)

Level	Term Used
Level 1	Zone
└─ Level 2	Divison
└─ Level 3	Region
└─ Level 4	Regional Manager

Terminology Structure User: FTsupport (Super Admin)

```

graph TD
    Zone --- Divison
    Divison --- Region
    Region --- RegionalManager[Regional Manager]
  
```

View/Edit Hierarchy

You may view or edit the existing hierarchy using the corresponding menu item.

The screenshot shows the 'View Hierarchy' page for a user named 'FTsupport (Super Admin)'. The interface includes a sidebar with navigation options: Organization, Hierarchy & Terminology, View/Edit Hierarchy, Default Hierarchy for Self-Registration, and Edit Structure. The main content area displays a hierarchical tree structure with expand/collapse icons and edit/delete symbols. The tree is organized as follows:

- Employee
 - Marketing
 - Midwest
 - Northeast
 - Southeast
 - West
 - + Add New Region Here
 - Sales
 - International
 - Midwest
 - Northeast
 - Southeast
 - West
 - + Add New Region Here
 - + Add New Division Here
- Public
 - + Add New Division Here
 - + Add New Zone Here

Default Hierarchy Level for Self-Registration

You may set a default hierarchy level for all students that self register. This allows you to keep privately offered classes out of public view.

The screenshot shows the 'Default Hierarchy Levels for Self-Registration' page for a user named 'FTsupport (Super Admin)'. The page includes a sidebar with navigation options: Organization, Hierarchy & Terminology, View/Edit Hierarchy, Default Hierarchy for Self-Registration, and Edit Structure. The main content area contains the following text and form:

When a student registers themselves into the student module, they need to be assigned into the hierarchy at a default level.

Choose Default Levels for Self-Registration

Zone: Employee (dropdown)
 Division: Marketing (dropdown)
 Region: Midwest (dropdown)
 Regional Manager: Brenda Andersen (dropdown)

Save Default Levels (button)

Edit Structure

This feature allows you to choose between a Flat (regular) or Hierarchy Structure.

The screenshot shows the 'Management Center - Organization' interface. At the top, there is a navigation bar with various icons. Below this, the page title 'Management Center - Organization' and the user 'User: FTsupport (Super Admin)' are displayed. On the left side, there is a sidebar with the 'Organization' section selected, containing two radio button options: 'Flat (regular)' and 'Hierarchy'. The main content area contains two sections of text:

- What is a Flat Organizational Structure?**
There will be one user of the Management module. Or, there may be several users who (while they may have access to different system features depending on their assigned Role) all have access to the same parts of your organization.
- What is a Hierarchical Organizational Structure?**
There may be multiple levels of users, using a hierarchy of 1-4 levels defined to determine what data each user can access.