Online Training Module (OTM)

Administrator Manual

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1   Introduction

The Online Training Module (OTM) is a user-friendly program that enables you to create your own online training courses. You can then assign the courses you have created to various users on your system as needed, such as franchisees, corporate staff, and more.

2   Accessing the OTM Administrator Module

To access the OTM Administrator Module, first log on to your Intranet and then navigate to the OTM Administrator link, which is usually called "OTM Admin View." This link can typically be found in your Library in the Intranet Information > Administrator Information folder.

Figure 1: Library Icon

NOTE: As shown above, in this manual we will be viewing the OTM for a fictitious franchise company (Zippy Lube).

3   OTM Administrator Module Main Menu

After you access the OTM Admin link you will see the **OTM Administrator Module Main Page** (*Figure 2*).

Figure 2: OTM Admin Module Main Page

On the **OTM Admin Main Page** you will see the following elements:

• **Navigation Buttons**

   o **Reports** – takes you to the Reports Main Page

   o **Courses** – when you are in the reports or categories section of the OTM Admin Module, use this button to return to the Main Page

   o **Categories** – takes you to the Categories Main Page (see Section)

NOTE: You may access these Navigation buttons throughout the OTM. They are used to navigate to the different areas of the OTM in lieu of "Back" or "Return" buttons.

• **Course Listing**

Under the heading **Courses**, this is the main course listing and course setup options, containing the following elements:

- **Add New Course Link** – allows you to add a new course to the OTM

- **Available Courses section**- lists all courses that have been created in the OTM that are not archived (i.e., all courses that are available to be activated and/or assigned to users)

- **Archived Courses section** - lists all courses that have been created in the OTM that are archived

4   Creating a Course

To create a course in the OTM, you first select the **Add New Course** link, as highlighted in **green** in *Figure 3*.

The course will then appear in the **Courses** listing with the **course setup options** listed to the right, as highlighted in **red** in *Figure 3*.

Figure 3: Sample Course in Course Listing

NOTE: The example in *Figure 3* shows a fictitious course titled "ASE Certification" which we will use throughout this manual to illustrate OTM course creation.

The steps involved in creating a course in the OTM follow this typical flow:

Add new course

⬇

Add course slides

⬇

Add course content (media) to designated course slides

⬇

Add course questions to course question bank

⬇

Assign questions to designated course slides

⬇
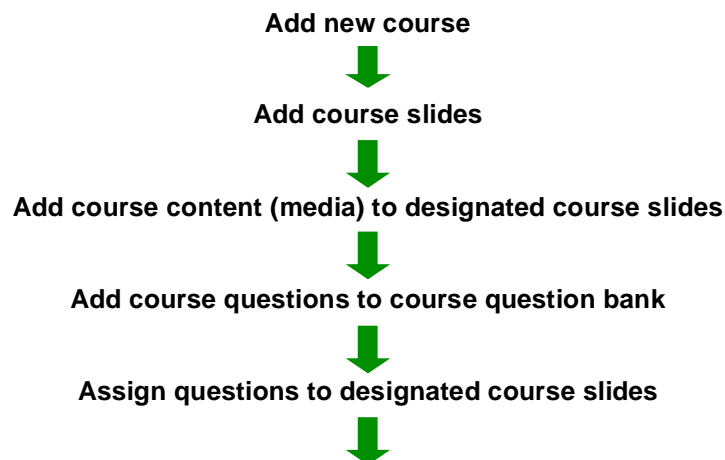
Activate course

Assign course to individual student or list of students

4.1 Add New Course

To create a new course, click on the **Add New Course** link, located just under the **Courses** heading on the OTM Admin Main Page. This will take you to the **Create A New Course Screen** (*Figure 4*).

Figure 4: Create A New Course Screen

Here you can fill in the name of the course, along with other fields that the user (student) will see on their Course Start Page (**Name of Course**, **Brief Description**, **Extended Description**, **Passing Grade**).

In addition, you may fill in a customized **Pass** and/or **Fail Message** that the user will see at the end of their course on the Test Results Screen.

Finally, if you wish this course to be automatically re-assigned to a user if they do not achieve a passing grade on the course, select the **Upon Failure re-assign Course** option. Selecting this option will automatically re-assign the course over and over until the user receives a passing grade on the course.

After filling the fields on this screen, click the **Create** button to create your course. It will then appear in the **Courses Listing** on the OTM Admin Main Page along with all of the **Course Options** (*Figure 3*).

4.2 Create Course Slides

Courses in the OTM are made up of **slides**. Each slide may include any combination of the following **media** to assist in the training:

- Text
- Images
- Videos
- Document links (PDF or Word files, web links)
- Assessment Questions

(For more information and examples of course slides, see the **OTM User Manual**).

NOTE: It is often helpful to plan your course organization before creating your slides. You may want to storyboard your course using Word or PowerPoint, to prepare text and images and layout, as well as to organize how and when content and questions will be presented. The flexibility of the OTM allows you to create different course/assessment formats, allowing you to create test questions at the end of the course and/or throughout the course.

The next step in creating a course is to begin creating the course slides. To do so, you must first click the **Manage Slides** link to the right of the course name, as highlighted in **green** in *Figure 5*.

Figure 5: ASE Course in Course Listing

4.2.1   Add New Slide

After clicking **Manage Slides**, you will be taken to the **Course Slides** screen (*Figure 6*).

Figure 6: Course Slides Screen

To create a new slide, click the **Add New Slide** link, which will take you to the **Create a New Slide Screen** (*Figure 7*), where you can enter the name of the slide.

NOTE: The slide name shows up for the student on the **Course Start Screen**, which lists all of the slides in the course.
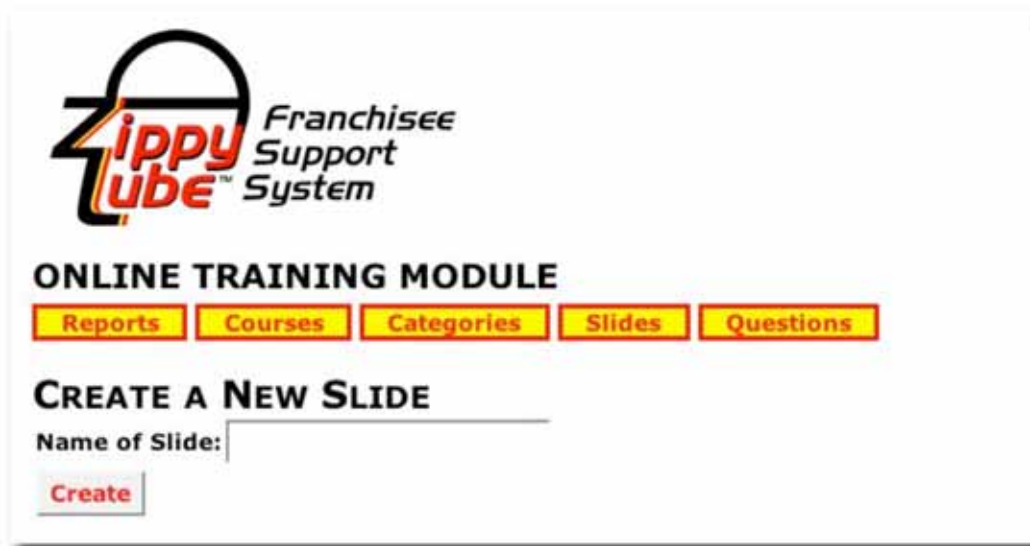
Figure 7: Create a New Slide Screen

After creating a new slide, it will show up in the **Course Slides** screen, along with the **Slide Setup Options**, as in *Figure 8*.
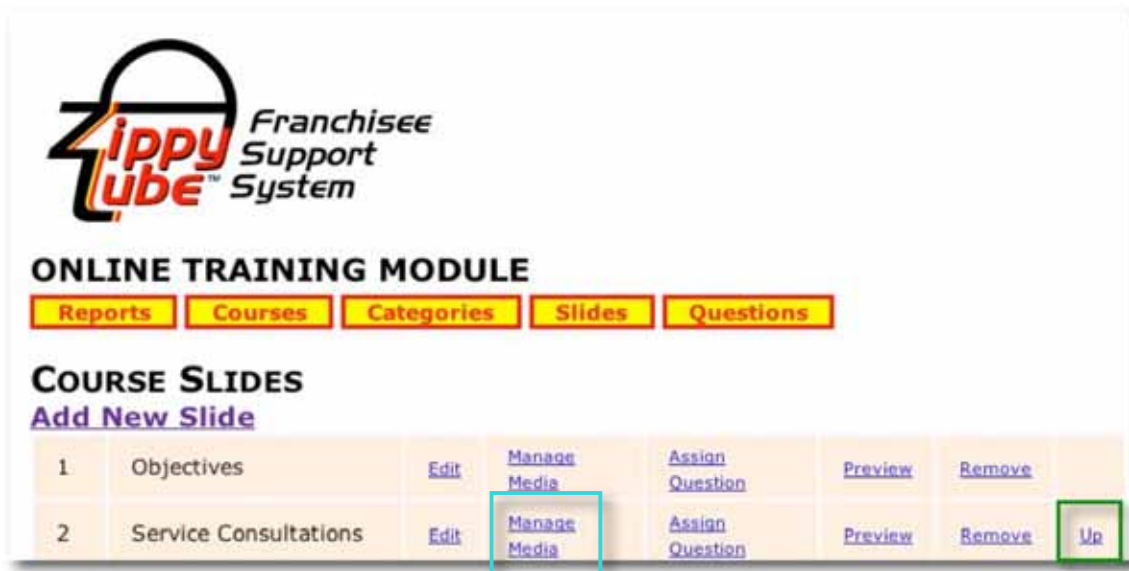
Figure 8: Course Slides Screen with New Slides Added

Slides will automatically be numbered by the system, with each new slide added to the end of the list. However, you may re-order the slides by using the **Up** links, as highlighted in **green** in *Figure 8*.

4.2.2   Manage Media

After adding a new slide, the next step is to add media to the slide. To do this, click the **Manage Media** link to the right of the slide to which you wish to add media, as highlighted **aqua** in Figure 8.

This will bring you to the **Manage Media** screen (*Figure 9*).

Figure 9: Manage Media Screen

On the **Media for Slide** screen, you will see two links that will give you the choice to **Add Media** or **Clone Media**.

After adding or cloning media to the slide, you will see the media listed on the **Media for Slide** screen, as in the example in *Figure 10.*
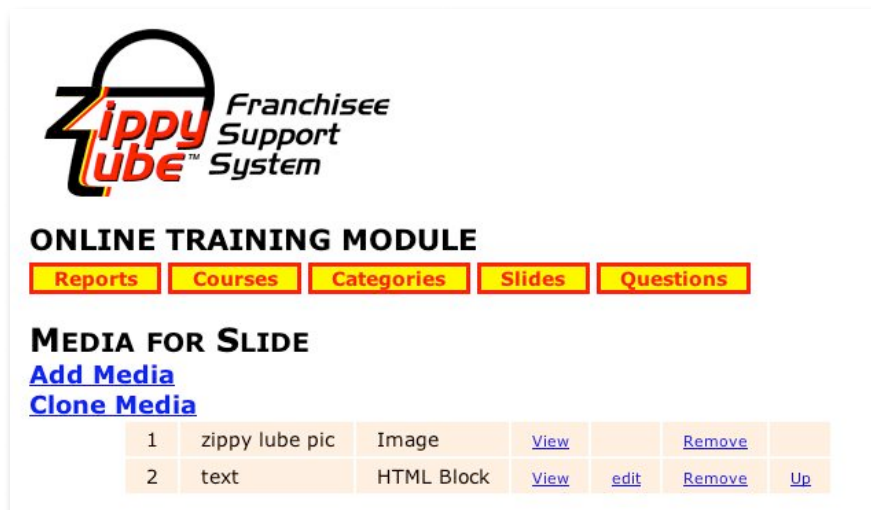
Figure 10: Sample Media Listing for Slide on Media for Slide Screen

The **Media for Slide** screen for each slide allows you to manage media for the slide by utilizing the options (links) to the right of each piece of media, as follows:

> **View** – displays a quick preview of the media piece
>
> **Edit** – available on HTML and video media types only; allows you to edit the media
>
> **Remove** – deletes the media from the slide
>
> **Up** – move the media up in the listing; used to re-order the media pieces

4.2.3   Add Media

To add media to a slide, click the **Add Media** link on the **Media for Slide** screen. This will take you to the **Add Media Screen** (*Figure 11*).
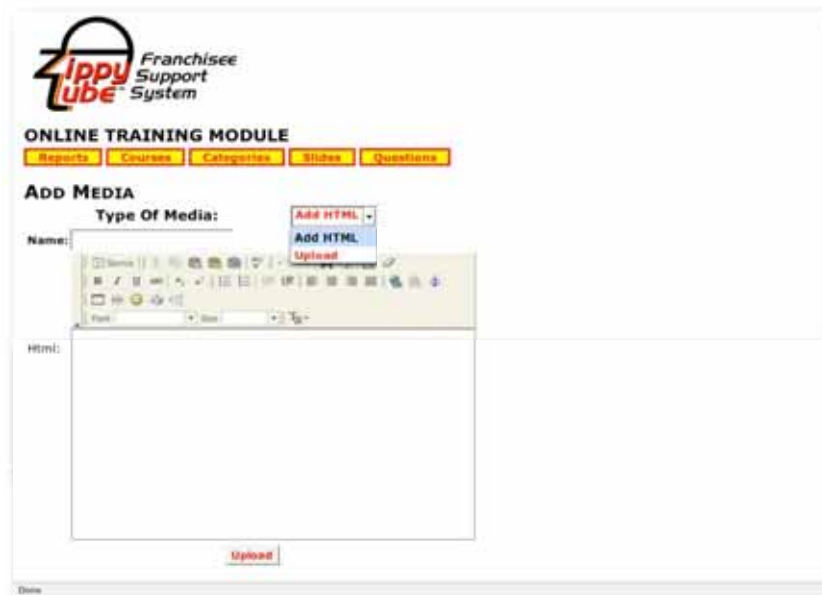
Figure 11: Add Media Screen

The **Type of Media** drop-down list allows you to select from two categories of media:

- **Add HTML** – allows you to add text to the slide
- **Upload** – allows you to add images, video and/or documents to the slide

4.2.3.1   Add HTML

This is the default choice, which will always appear when after you click **Add Media**. This choice displays the **HTML Editor**, as seen in *Figure 11*.

The HTML editor is similar in look, feel and function to a word processing program such as Word. It allows you to add text to your slides.

To add text to your slides using this screen, first type a name for this piece of media into the **Name** box. This is the name you will use to identify this piece of media when it is listed on the slide in the **Media for Slide** screen.

Next, type the text you wish to appear on the slide into the body text area of the HTML editor, and use the editing buttons to format your text.

When you are ready to add the media to your slide, click the **Upload** button. You will then see your media listed on the **Manage Media** screen for the current slide (see *Figure 10*).

4.2.3.2   Upload

When you select this option from the **Type of Media** drop-down list, you are presented with the **Upload Options** screen (*Figure 12*).

Figure 12: Upload Options Screen

From the **Upload Options** screen, you may choose several different types of files to upload via the **Type of File** drop-down list (*Figure 13*).

Figure 13: Type of File Drop-Down List

To upload files, simply select the type of file you wish to upload from the **Type of File** drop-down list.

Next, type a name for the piece of media in the **Name** box. Then click the **Browse** button to locate the file on your computer.

To upload the media to the slide, click the **Upload** button. You will then see your media listed on the **Manage Media** screen for the current slide (see *Figure 10*).

NOTE: For all file types except Flash (*.swf) video, you do **NOT** need to type any values into the **Height** and **Width** boxes. When using Flash video, you will need to type in a size to display the video. A common size is 480 (height) x 640 (width), but the boxes will accept any numerical value.

In addition, the other video file types (*.wmv, *.avi) are labeled NOT AVAILABLE; however, IFX can add these types of video for you. Contact IFX at **support@ifxonline.com** to request them to be added.

4.2.4   Clone Media

The **Clone Media** option allows you to copy, or "clone" image files that you have already used on other slides in the same course. This allows for quick copying of the image, preventing you from having to upload the same image repeatedly using the **Add Media > Upload** function.

To clone an existing image, click the **Clone Media** link on the **Media for Slide** screen. This will bring you to the **Clone Media** screen (*Figure 14*).

Figure 14: Clone Media Screen

On the **Clone Media** screen, all media from the course are displayed. Because images are the only media that may be cloned, images have a **Clone** button

available, whereas all other types of media have a message stating, "Cannot be Cloned."

To preview an image before cloning it, click the **View** link to the right of the image.

To clone the media and copy it to the current slide, click the **Clone** button. You will then see your media listed on the **Manage Media** screen for the current slide (see *Figure 10*).

4.3 Create Course Questions

4.3.1 Course Question Bank

To create course questions, it is necessary to first add the questions to the **Course Question Bank**. Then you may assign a question to a designated slide that you have created for this purpose.

NOTE: A slide may contain any combination of media (i.e., text, images, videos, etc.). However, a slide may only contain **ONE** question.

To access the **Course Question Bank**, click the **Questions** button.

NOTE: The **Questions** button may only be accessed from the **Course Slides** or **Media for Slide** screens for the course. In other words, because each course you create in the OTM has its own unique question bank, you will never see a **Questions** button on the **OTM Admin Main Page**. Instead, you must navigate inside a course (i.e., by clicking **Manage Slides** for a course on the main page) to access the Questions button.

After clicking the **Questions** button, you will be taken to the **Course Question Bank** screen (*Figure 15*).

Figure 15: Course Question Bank screen

4.3.2 Add Question

To add a question to the **Course Question Bank**, click the **Add New Question** link. This will bring you to the **Create Question and Answers** screen (*Figure 16*).

Figure 16: Create Question and Answers screen

From this screen you may create three different types of assessment questions: using the **Type of Question** drop-down list: **True/False, Multiple Choice,** or **Write-In.**

To create any type of question, first type the question text in the **Question** box.

NOTE: The **Strength Displayed in this question** box is inoperative at this time.

Next, in the **Reviewable** drop-down list, you may select from four different reviewing options. These options allow you to control whether or not the student can review the question and answer in the **Test Results** screen at the end of the course. The question and answer is displayed, along with the correct answer highlighted in bold, along with the answer the student selected. The reviewing options are as follows:

- **Reviewable** - allows the student to always see this question and its answer choices in the Test Results screen at the end of the course, regardless of whether the student passes or fails the course.

- **Not Reviewable** - hides this question and its answer choices from the student, so that it does not display in the Test Results screen at the end of the course, regardless of whether the student passes or fails the course.

- **Reviewable Only If Failed -** allows the student to see this question and its answer choices in the Test Results screen at the end of the course ONLY if the student fails the course. This option is typically used in conjunction with the "Upon Failure re-assign Course" option (*see **Section 4.1***).

- **Reviewable Only If Pass** - allows the student to see this question and its answer choices in the Test Results screen at the end of the course ONLY if the student passes the course. This option is typically used in conjunction with the "Upon Failure re-assign Course" option (*see **Section 4.1***).

4.3.2.1 Adding True/False Questions

When you select **True/False** from the **Type of Question** drop-down list, you will be presented with the **True/False Options** screen as displayed in *Figure 17*.

To create a true/false question, type your question stem in the **Question** box, and then select "true" or "false" from the **Pick** drop-down list to indicate whether the question stem is true or false, as in the example in *Figure 17*.

When you are finished creating your question, click the **Add** button to add it to the **Course Question Bank**.

Figure 17: True/False Options Screen

4.3.2.2 Adding Multiple Choice Questions

When you select **Multiple Choice** from the **Type of Question** drop-down list, you will be presented with the **Multiple Choice Options** screen as displayed in *Figure 18.*

To create a multiple choice question, type your question stem in the **Question** box, and then type in your answer choices in the **Answer** boxes provided.
If you need more answer choices, click the **Add Multiple Question Answer** link to add more Answer boxes.

Next to each Answer box is a drop-down list where you will select either **Correct** or **Not Correct** for each answer choice.

When you are finished creating your question, click the **Add** button to add it to the **Course Question Bank**.

Figure 18: Multiple Choice Options Screen

4.3.2.3   Adding Write-In Questions

When you select **Write-In** from the **Type of Question** drop-down list, you will be presented with the **Write-In Options** screen as displayed in *Figure 18.*

To create a write-in question, type your question stem in the **Question** box, and then type in your answer choices in the **Possible Answer** boxes provided. If you need more answer choices, click the **Add Possible Answer** link to add more **Possible Answer** boxes.

NOTE: Possible Answer boxes on write-in questions are **case-sensitive**. Thus, you may wish to include possible answers that account for capitalization errors (if your course requirements allow them) as in *Figure 19.*

However, even if you do not allow for this variable while creating your question, you still have the option to review the answers given by a student and correct them if needed.

For example, in the sample question shown in Figure 19, "The sky is…," if the student writes "bLUE" in their answer box while taking the test, the system will mark that answer as incorrect. When you as the administrator review the test results, if you wish to grant the student credit for that answer, you do have the option to override it and make it correct in the **Reports** area.

When you are finished creating your question, click the **Add** button to add it to the **Course Question Bank**.

Figure 19: Write-In Options Screen

4.3.3 Assigning Questions to Slides

After you create your questions, in order to utilize the questions in your course, you will need to assign each question to its own individual slide. To assign a question to a slide, you must first make sure that you have created all of the slides to which you intend to assign questions.

Next, navigate to the **Course Slides** screen for the course (accessed by clicking the **Slides** button within the course, or clicking the **Manage Slides** link next to the course on the OTM Admin Main page).

Then click the **Assign Question** link next to the slide you wish to assign a question (as highlighted in **green** in *Figure 20*).
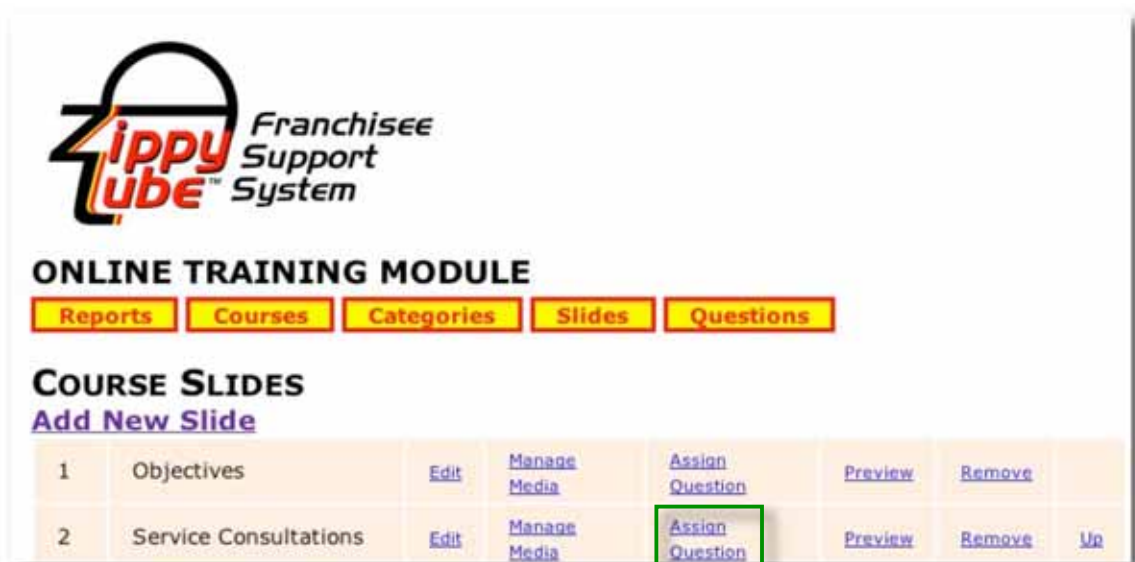

Figure 20: Assign Question link

This will bring you to **the Assign Question to a Slide** screen (*Figure 21*).
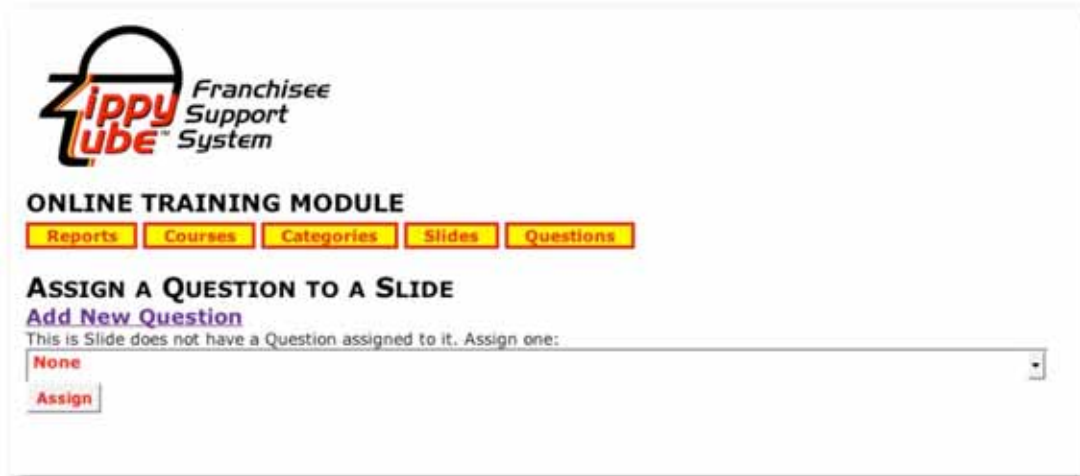
Figure 21: Assign Question to a Slide screen

On this screen is the **questions drop-down list**, which contains all of the questions currently available for assignment in the **Course Question Bank**. Directly above the questions drop-down list it states "This Slide does not have a Question assigned to it. Assign one."

To assign a question to the slide, select the question from the questions drop-down list, as in the example in *Figure 22* below.

Figure 22: Questions Drop-Down List

NOTE: The default choice listed in the questions drop-down list is "**None**." "None" is actually a choice; if you select "None" and click **Assign**, it will "un-assign" any currently assigned question from that slide. *(See **Section 4.3.4**).*

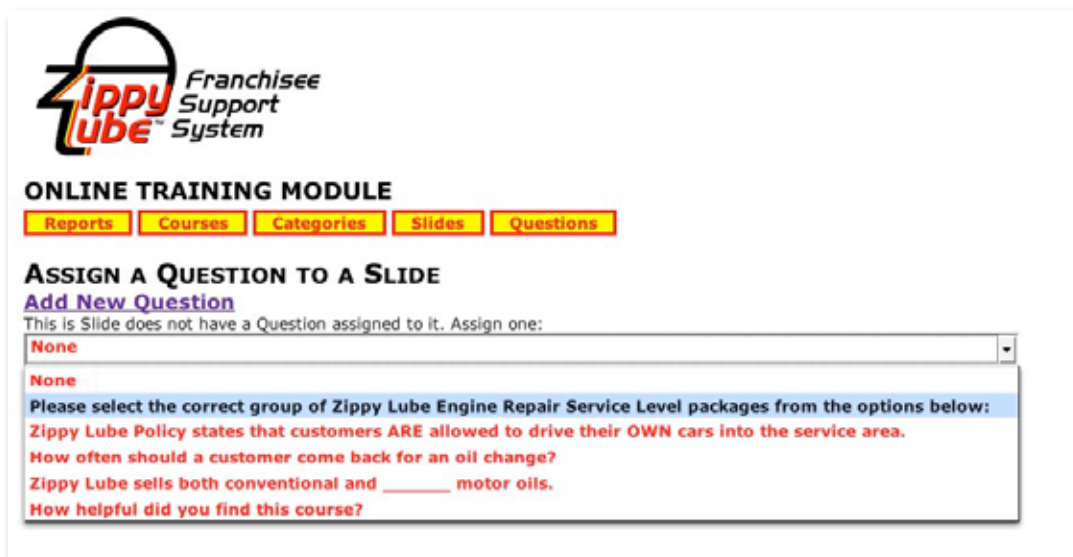After selecting your question from the drop-down list, click the **Assign** button to assign the question to the slide. You will then be taken back to the **Course Slides** listing.

To make sure the question has been assigned correctly, click **Preview** next to the slide to which you have just assigned the question.

4.3.4   Removing/Re-Assigning Questions from Slides

To remove, or **un-assign** a question from a slide, navigate to that slide on the **Course Slides** menu and click **Assign Questions**.

Next, on the **Assign a Question to a Slide** screen, you will be able to see the question currently assigned to that slide in just above the questions drop-down list, as highlighted in **green** in *Figure 23* below.
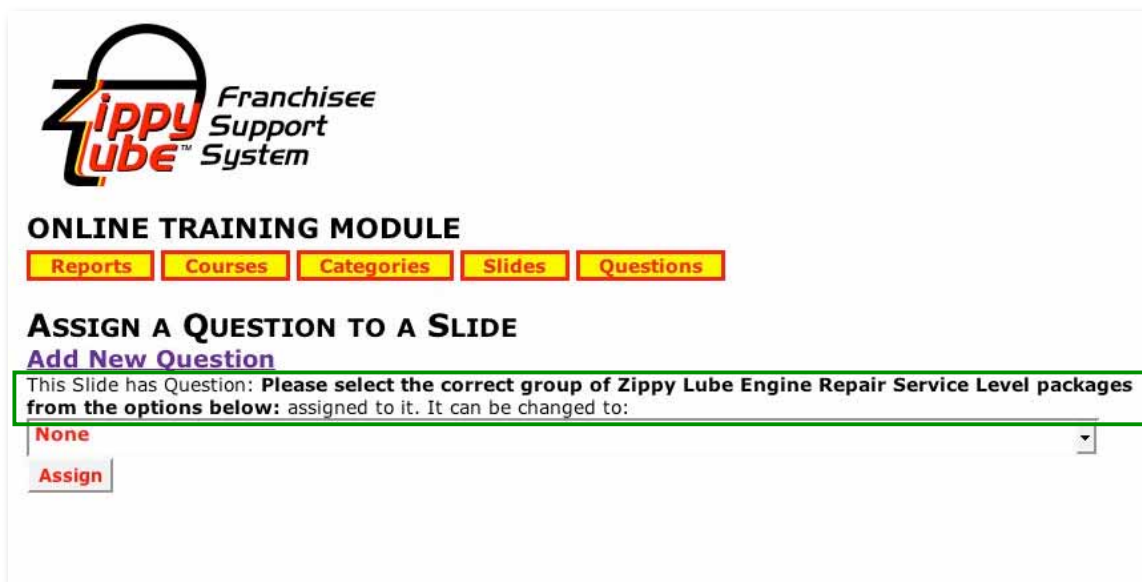

Figure 23: Removing a Question from a Slide

To **remove the question** from the slide, select **None** from the questions drop-down list, then click **Assign**.

To **assign a different question** to the slide, select the question you wish to assign from the questions drop-down list, then click **Assign**.

NOTE: Only questions that are available to be assigned will be present in the questions drop-down list. Available questions are questions that are not currently assigned to a slide. Therefore, if a question is already assigned to a slide ("Slide A" for example) and you wish to assign it to a different slide ("Slide B" for example), you must first make the question available to assign to Slide B by removing it from Slide A.

4.4 Activate/De-Activate a Course

After you have completed a course, you will not be able to assign it to any users unless you **activate** it. The **Activate** function is a fail-safe designed to prevent you from accidentally assigning a course to students before it is ready. If a course is not activated, even if you try to assign it to a user, it will not show up on their screen until it is activated.

To activate a course, click the **Activate** link to the right of the course (*Figure 24*).

Figure 24: Activate a Course

The **Activate** link acts as a toggle switch; as soon as you click **Activate**, you will see **De-Activate** displayed in its place (*Figure 25*).

Figure 25: De-Activate a Course

To **de-activate** the course, click the **De-Activate** link, and then you will see the **Activate** link displayed again.

4.5 Assign a Course

There are two options for assigning individual courses: you can either assign the course to an **individual** student, or you may assign that course to a **list** of users. These options are listed to the far right of the course (*Figure 26*).

Figure 26: Assign to Student or List

After assigning a course to a user (or list of users), they will see the course appear in their personal course listing when they login to the OTM (via the **OTM User View** web link).

4.5.1 Assign a Course to a Student

To assign a course to a student, click the **Assign to Student** link (*Figure 26*).

This will bring you to the **Assign Course to Student** screen (*Figure 27*).

Figure 27: Assign to Student screen

The **Assign Course to Student** screen lists the names all of the users in your Intranet (in both the parent-org and all sub-orgs), allowing you to assign a course to any user on your system. This screen also lists the outside-world email address in the users' profiles, as well as how many courses have been assigned to this student, and how many the student has passed or failed.

NOTE: In order to show up in this list, users **must** have an outside-world email address listed in their Intranet profile (as listed in the **Email** column in the **Assign to Student** screen).

To assign a course to an individual student, select the date you would like the course to be assigned, then click the **Assign** button. The number in the **Assigned** column will change to reflect the new assignment.

4.5.2 Assign an Individual Course to a List of Students

To assign a course to a student, click the **Assign to List** link (*Figure 26*).

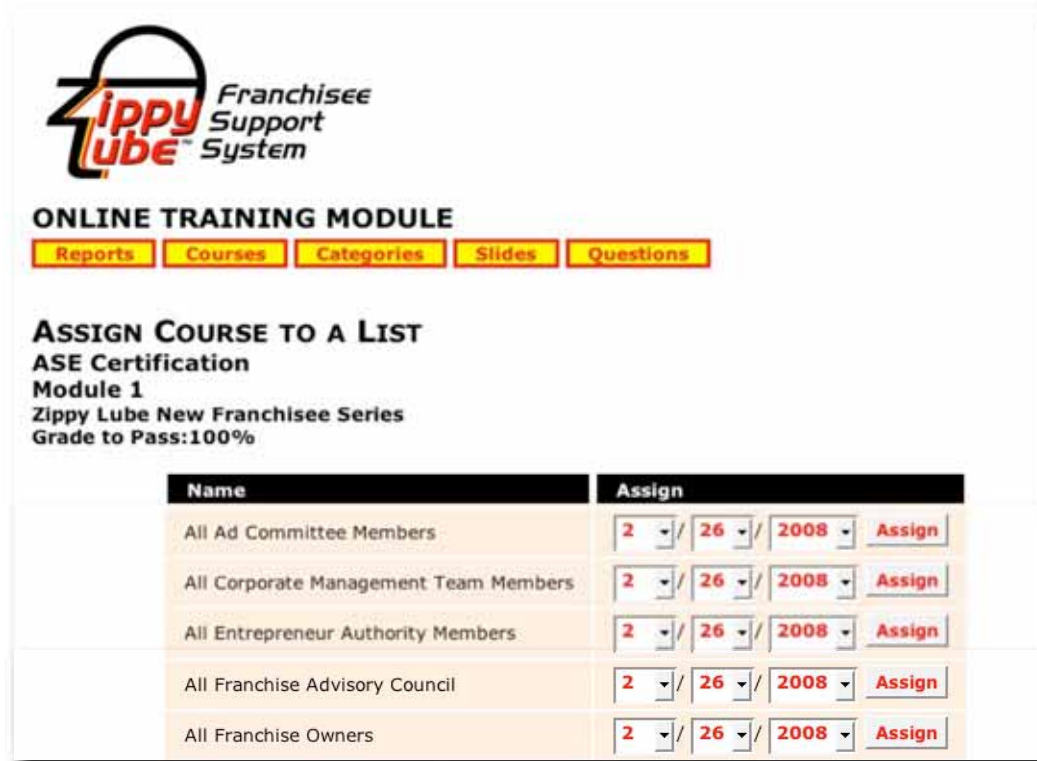This will bring you to the **Assign Course to A List** screen (*Figure 28*).

Figure 28: Assign Course to a List screen

The **Assign Course to a List** screen lists all of the white icon mailing lists in your Intranet, allowing you to assign a course to users on any white icon list on your system.

To assign a course to a list, select the date you would like the course to be assigned, then click the **Assign** button.

5 Categories

The Categories section of the OTM Admin Module allows you to create your own categories, which you can use to organize courses that you have created into groups by category. This allows you to assign categories of courses to students, which in turn allows you to assign multiple courses at one time to students.

To access the **Categories** section of the OTM, click the **Categories** navigation button at the top of the screen.

This will take you to the **Categories Main Page** (*Figure 29).*

Figure 29: Categories Main Page

The **Categories Main Page** contains three main elements:

- **Add New Category** link – allows you to add new categories

- **Available Categories** section – lists all of the categories that currently exist in the OTM

- **Assignable Courses** section – lists all of the active (non-archived) courses that currently exist in the OTM

5.1 Add a Category

To add a category, click the **Add New Category** link on the Categories Main Page. This will display the **Create New Category** screen (*Figure 30*).

Figure 30: Create New Category screen

Type the name of your category in the **Name of Category** box.

The **Brief Description** box is provided for you to type in a description of the category if needed, but it is not a required field.

To create your category, click the **Create** button. You will then be returned to the Categories main page, where you will see your newly-created category, as in the example in *Figure 31*.

Figure 31: Sample Category Listed on Categories Main Page

To the right of the category are the category options, as follows:

- **Assign to Student** – allows you to assign the category to a student; this will assign all of the courses within that category to the student at the same time (*see Section 5.4*)

- **Edit** – allows you to edit the name and description of the category

- **Archive** – allows you to archive (aka delete) the category

5.2 Adding a Course to Category

To add a course to a category, scroll down to the **Assignable Courses** section of the **Categories Main Page** (as highlighted in **green** in *Figure 32*).

Figure 32: Assignable Courses section

Next, click the **Assign to/Remove From Categories** link to the right of the course that you would like to add to a category (as highlighted in **red** in *Figure 32*).

In our example, we will be adding a course to the category called "Current Franchisee Training," which is the only category available.

Clicking the **Assign to/Remove From Categories** link will bring you to the **Assign to Categories** screen (*Figure 33*).

Figure 33: Assign to Categories screen: Add Course to Category

On the **Assign to Categories** screen, the **Assignable Categories** will be listed. To assign the course to a category, click the **Add To** link next to the category to which you would like to add the course (as highlighted in **green** in *Figure 33*).

NOTE: You may assign a course to multiple categories at the same time. In this example, we are trying to add the ASE Certification course to the Current Franchisee Training category, which is the only category currently created. If there were more categories, you could add the course to additional categories at the same time on this screen.

After adding the course to the category on the **Assign to Categories** screen, you will see a message in place of the **Add To** link that states **"Added"** (*Figure 34*).

Figure 34: Course Added Message

Now that you have added the course to the category, you will be able to see it listed to the right of the course in the **Categories** listing, as highlighted in **green** in *Figure 35*.

Figure 35: Course Added to Category

5.3 Remove a Course from a Category

To remove a course from a category, scroll down to the **Assignable Courses** section of the **Categories Main Page** (as highlighted in **green** in *Figure 32*).

Next, click the **Assign to/Remove From Categories** link to the right of the course that you would like to add to a category (as highlighted in **red** in *Figure 32*).

In our example, we will be removing a course called "ASE Certification" from the category called "Current Franchisee Training," which is the only category available.

Clicking the **Assign to/Remove From Categories** link will bring you to the **Assign to Categories** screen (*Figure 36*).

Figure 36: Assign to Categories screen: Remove course from category

On the **Assign to Categories** screen, the **Assignable Categories** will be listed. To remove the course from a category, click the **Remove From** link next to the category to which you would like to add the course (as highlighted in **green** in *Figure 36*).

NOTE: You may remove a course from multiple categories at the same time. In this example, we are trying to remove the ASE Certification course from the Current Franchisee Training category, which is the only category currently created. If the course was assigned to multiple categories, you could remove the course from any additional categories at the same time on this screen.

After removing the course from the category on the **Assign to Categories** screen, you will see a message in place of the **Remove From** link that states **"Removed"**

Figure 37: Course Removed Message

5.4 Assign a Category to a Student

To assign multiple courses (within a category) to a student, click the Assign to Student link to the right of the category, as highlighted in **green** in *Figure 38*.
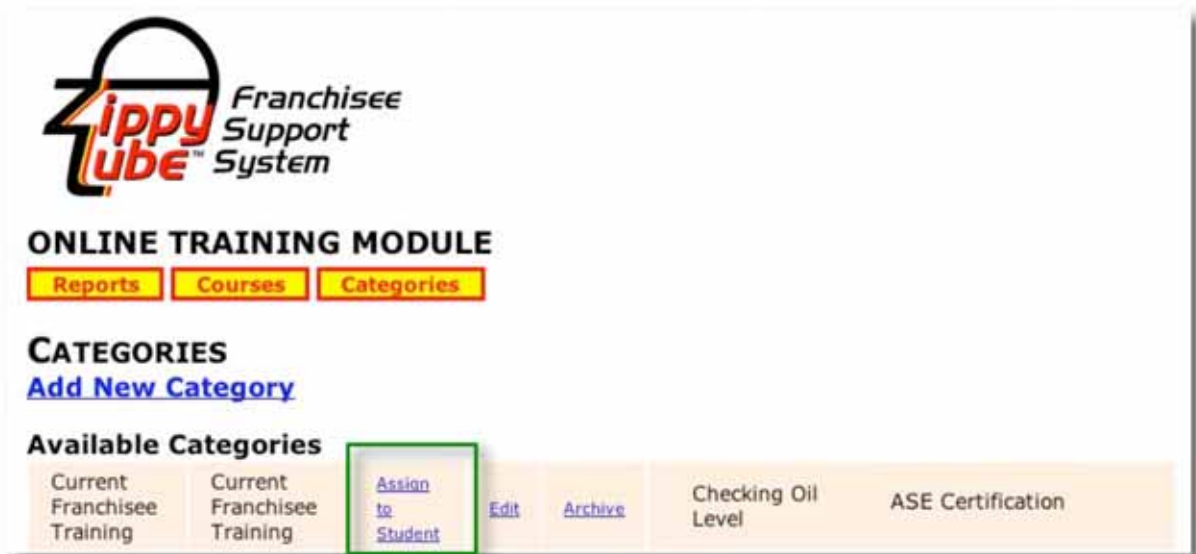

Figure 38: Assign (Category) to Student Link

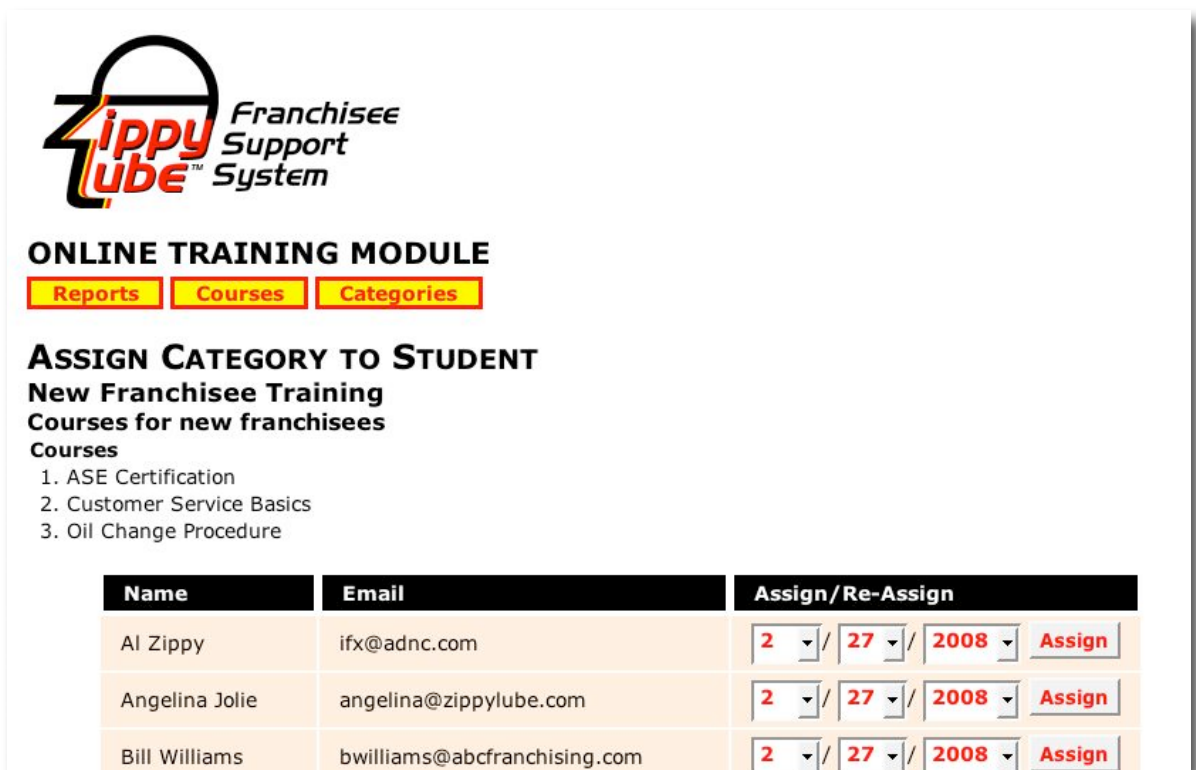This will bring you to the **Assign Category to Student** screen (*Figure 39*).

Figure 39: Assign Category to Student screen

The **Assign Category to Student** screen lists the category you are assigning, along with the courses within that category. Below this is the listing of students available for you to assign the category to. This list is composed of all of the users in your Intranet system that have an email address listed in their Intranet profile.

To assign the category to a student, set the date that you wish the course to be assigned in the **Assign/Re-Assign** column, then click the **Assign** button.

6 Reports

The **Reports** section of the OTM Admin Module allows you to run various score reports to track your students' progress.

To access the Reports section of the OTM, click the **Reports** navigation button from any screen in the OTM. This will bring you to the **Reports Main Page** (*Figure 40*).

Figure 40: Reports Main Page

The **Reports Main Page** has two reporting links available for you to access:

- **Assignment Report Builder** – allows you to build a custom report on students, tests taken, date range, etc.
- **Tests Taken** – displays an overview of all tests taken and scores received

6.1 Assignment Report Builder

Clicking the **Assignment Report Builder** link on the **Reports Main Page** will bring you to the **Assignment Report Builder** screen (*Figure 41*).

Figure 41: Assignment Report Builder screen

The **Assignment Report Builder** screen consists of various drop-down lists that allow you to select different variables to include in your report, in any combination you wish. If you wish to create a custom report, select any combination of criteria from the available drop-down list options, which are:

- **User** – filters the report for an individual **user**

- **Course** – filters the report for an individual **course**

- **Result** – filters the report for a result; either courses that have been **Passed**, **Failed**, or **Both**

- **Taken/Not Taken** – filters the report for **status**; either courses that have been **Taken**, **Not Taken**, or **Both**

- **From this day/Ending at** – filters the report by **date range**

If you wish to bring up a list of all users and tests taken, do not select any options, and then click the **Execute Report** link, which will display the report in the **Report Result** section (*Figure 42*).

Figure 42: Assignment Report Builder Results Example

To return to the **Reports Main Menu**, click the **Reports** button at the top of the screen.

6.2 Tests Taken Report

The **Tests Taken** link on the **Reports Main Page** will bring you to the **Tests Taken** screen (*Figure 43*).

Figure 43: Tests Taken Report Example

To return to the **Reports Main Menu**, click the **Reports** button at the top of the screen.

7   IFX Support

If you have any questions please contact an IFX Online support staff member at:

      E-mail: **support@ifxonline.com**

      Phone: **858-724-1024**

Appendix A: Test Taker Module

Overview

The Test Taker Module is included with your standard OTM (standard = the OTM Admin and OTM User Modules). The Test Taker Module enables you to allow your franchisees to assign courses that you have created to their employees via the Test Taker Admin Module, and the employees to take the courses via the Test Taker User Module.

Thus, the OTM consists of four levels:

Level 1: OTM Administrator Module

This is the overall administrator module, which allows you to do the following:

- Create courses
- Assign courses to franchisees and/or corporate staff (i.e., anyone with a regular Intranet account in the parent-org or in a sub-org)
- View an create score reports for users to track their progress

Level 2: OTM User Module

This is the user module that franchisees and/or corporate staff access in order to take the courses you have assigned to them using the OTM Admin Module. In other words, this is the link that anyone with a regular Intranet account in the parent-org or in a sub-org will use to take OTM courses.

Level 3: OTM Test Taker Admin Module

This is where the franchisee can assign courses to their employees, as well as create temporary "test taker" accounts for their employees. (**NOTE:** The franchisee has no ability to create courses via this module; course creation is only possible via the OTM Admin Module (Level 1)).

Level 4: OTM Test Taker User Module

Allows franchisee's employees to take courses assigned to them by the franchisee via the Test Taker Admin Module.

Test Taker Admin Module: Setup and Preparation

As outlined above, the OTM Test Taker Admin Module works in conjunction with the OTM Test Taker User Module, which allows the employee to access their courses.

However, because the franchisee's employees will need to access the Intranet in order to access the Test Taker User Module, an Intranet administrator will need to create a secondary "store" login for each franchisee. This is necessary because in order for the franchisee to create a test taker account for an employee the franchisee will need to associate the test taker account with an Intranet login, and provide that login to the employee along with his/her test taker login.

Thus, when the employee logs in, they will first login to the Intranet using the store login, then access the OTM Test Taker link, then login there using their OTM Test Taker login.

Thus, the recommended admin setup that should be utilized before allowing franchisees access to the OTM Test Taker Admin Module is as follows:

1. **Create a "Training Library" and new mailing list called "All OTM Store Logins."**
   a. Create a new library called "Training Library."
      i. Go into the red icon list called "Can Access Training Library" and click Edit Membership, then add the accounts of the individual OTM administrators.
   b. Create a new white icon mailing list called "All OTM Store Logins."
      i. Add the red icon list called "Can Access Training Library" to the All OTM Store Logins" list.
   c. Re-create all four OTM web links in the Training Library.
   d. Hide the OTM Admin and User links accordingly:
      i. OTM Admin link should be made viewable only to individuals who are OTM administrators
      ii. OTM User link should be made viewable to the "All Franchisees" and "All HQ (Corporate Staff)" white icon lists
      iii. OTM Test Taker Admin link should be made viewable only to the "All Franchisees" white icon list and the individual OTM administrators
      iv. OTM Test Taker link should be made viewable only to the "All OTM Store Logins" and "All Franchisees" white icon lists, and to the individual OTM administrators

2. **Create OTM Store Login accounts for all of your franchisees.**
   a. Go into each franchisee's sub-org and create a store login account.
   b. When creating the store login accounts, follow a common naming convention. For example, in the Edit Basic Info section, the First Name on the account could be the store/unit location, and the Last Name could be the words "StoreLogin." Then the actual login name could be store location + "OTM." (For example, you could have an account named "Hollywood Store Login," for which the login name would be "OTMHollywood.")
   c. After creating all of the store login accounts, add all of the new store logins to the white icon list called "All OTM Store Logins."

3. When ready to train the franchisees, give them access to the Training Library.
   a. Do this by going into the "All Franchisees" white icon list, then Edit What Lists this is a member of, and then add the red icon list called "Can Access Training Library."

4. **Train your franchisees on the Test Taker Admin Module**
   a. Instruct your franchisees on the following:
      i. How to add test taker accounts and associate them with their store login
      ii. How to add courses and categories to test takers
      iii. How to run score reports
      iv. How to double-check their test taker accounts by accessing the Test Taker User Module