Training Guide and Process Map:

Requirements to Launch an APeX Captivate eCourse in SumTotal

UCSF Medical Center

Learning Services

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San Francisco, CA 94118

Updated: 10/26/15

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Document Change Log

Date	Author	Description
8/21/15	Max Ferman	.v1
8/25/15	Max Ferman	Final
10/20/15	Max Ferman	Revisions – Contacts - pg 3 Section 10 numbering: 5, 70
10/26/15	Max Ferman	Revisions : Section 1 – New requirements from EPIC NEW SECTION 3: How to upload to SumTotal STAGE NEW SECTION 4: TEST each eCourse in SumTotal STAGE

Objective

This training guide details the step-by-step process and workflow required for both UCSF **APeX Training** and **Learning Services** contacts to **prepare** and **launch** an **APeX** Captivate eCourse in SumTotal.

Intended Audience:

APeX Training Contacts (10/20/15)

Director

- alissa.porter@ucsf.edu

Trainer

- robert.Schechtman@ucsf.edu

Instructional Designers

- edward.knych@ucsf.edu
- venus.hicks@ucsf.edu

Training Coordinator

- natalie.haas@ucsf.edu

Learning Services

LMS Administrators and eCourse Developers

- maxine.ferman@ucsf.edu
- desmond.chao@ucsf.edu (backup)

Prep NOTES for APeX Training:

Minimum Requirements

1. **EPIC UserWeb Account**
    - Confirm: https://userweb.epic.com/all/uweblogin/login.aspx?ReturnUrl=%2f
2. **UCSF SumTotal Account**
3. **UCSF BOX Account**
4. **Captivate**
5. **HTML Editor**

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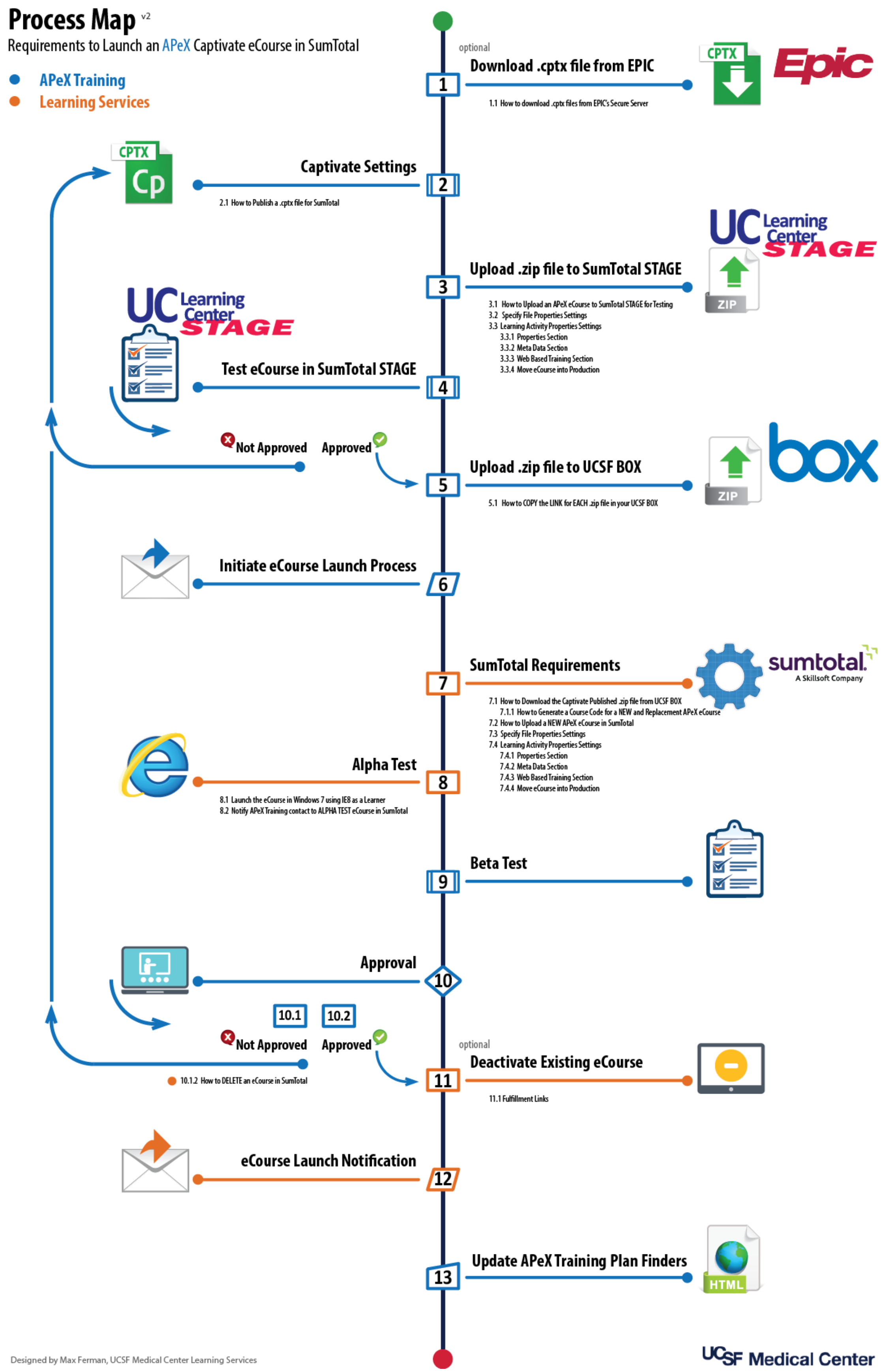
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Designed by Max Ferman, UCSF Medical Center Learning Services
UCSF Medical Center

Decision Point

APeX Training

If a **NEW** or **REPLACEMENT APeX** eCourse is required in the UC Learning Center (SumTotal), you will either need to either **download** and customize an existing eCourse from EPIC, or **develop** an eCourse that is specific to the UCSF **APeX** workflow.

1. If you need to **download** and customize an existing eCourse from EPIC, please go to **Step 1** of this process.

2. If you need to design and **develop** an eCourse using Captivate Template(s) created by **APeX Training**, please go to **Step 2**.

1

APeX Training

1. Download .cptx files from the EPIC Secure Server

(optional)

EPIC currently hosts all Captivate (.cptx) files and "Published Files" on its secure server, or **Training File Delivery Service (TFDS).**

EPIC only allows two individuals per customer who both have an active UserWeb Account to **DOWNLOAD** files from EPIC's TFDS.

As of October 2015, EPIC issued **NEW** requirements to both download "Published Files" and Captivate source files from the EPIC Training File Delivery Service (TFDS).

From: Alissa Dyreby [mailto:Alissa@epic.com]
Sent: Friday, October 23, 2015 12:34 PM
To: E-Learning Submissions
Subject: Epic 2015 E-Learning Lessons
Bcc… Training File Delivery Service (TFDS) downloaders

Happy Friday,

A couple of quick updates and one reminder for you.

Based on your feedback:

- We have placed e-learning Captivate source files and scripts on TFDS to allow for fast self-service download (as opposed to following a request process). The attached document [SEE Appendix 1] outlines how to locate and download the various file types on TFDS.
- We are continuing to upload Epic 2015 published lessons with LMS settings applied. Published lessons on TFDS are available the standard way (no settings applied), SCORM 1.2, SCORM 2004 (4th edition), and AICC. We're glad you're finding those useful!

Reminder:

- If you haven't done so already, please review the attached document and complete the following quiz: Downloading Epic E-Learning

Thank you, and please let us know if you have any questions regarding Epic E-learning content!

- Alissa
Alissa Dyreby
Training
Epic | 608.271.9000 | alissa@epic.com

From: Alissa Dyreby
Sent: Tuesday, October 20, 2015 9:19 AM
To: E-Learning Submissions <E-LearningSubmissions@epic.com>
Subject: Epic 2015 E-Learning Lessons

Hello,

If you have taken a look at captivate.epic.com recently, you might have noticed **Epic 2015 content is now available**! There are a few additional updates we want to make you aware of.

To maintain your access to TFDS:

- We have an updated document for you to review and share with anyone working with Epic's e-learning files (attached). This document outlines our newest guidelines and helpful information about how to store and use Epic e-learning.
- Once you have reviewed the document, please complete the following quiz: Downloading Epic E-Learning
- If you haven't completed the quiz by 11/2, your access to TFDS will be put on hold until it is completed.

Files available in TFDS:

- As part of the Epic 2015 release, we are taking steps to help make our published lessons more 'ready for use' out of the box. In addition to publishing them the standard way (no settings applied), we will now also publish them with SCORM 1.2, SCORM 2004 (4th edition), and AICC.
- If you require the source Captivate or script files for a lesson, the process to follow to access those files is outlined in the attached document.

Thank you, and let us know what questions you have!

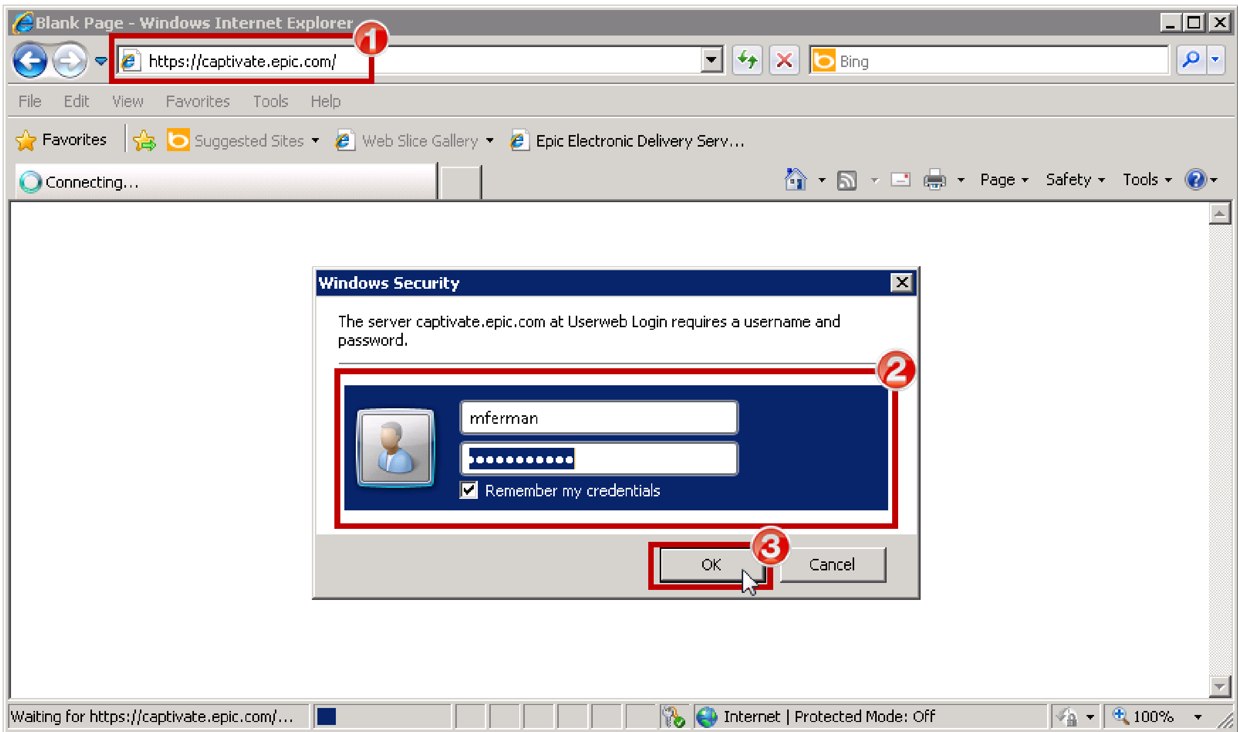
- Alissa

Alissa Dyreby
E-Learning
Epic | 608.271.9000 | alissa@epic.com

1.1 How to Download Epic eLearning Files

After you have read and completed all of EPIC's requirements (**See Appendix 1**), you can login to EPIC's TFDS from the UCSF Network domain with your active UserWeb Account.

1. **GO TO: https://captivate.epic.com**.
2. **TYPE** your EPIC username and password.
3. **CLICK OK.**

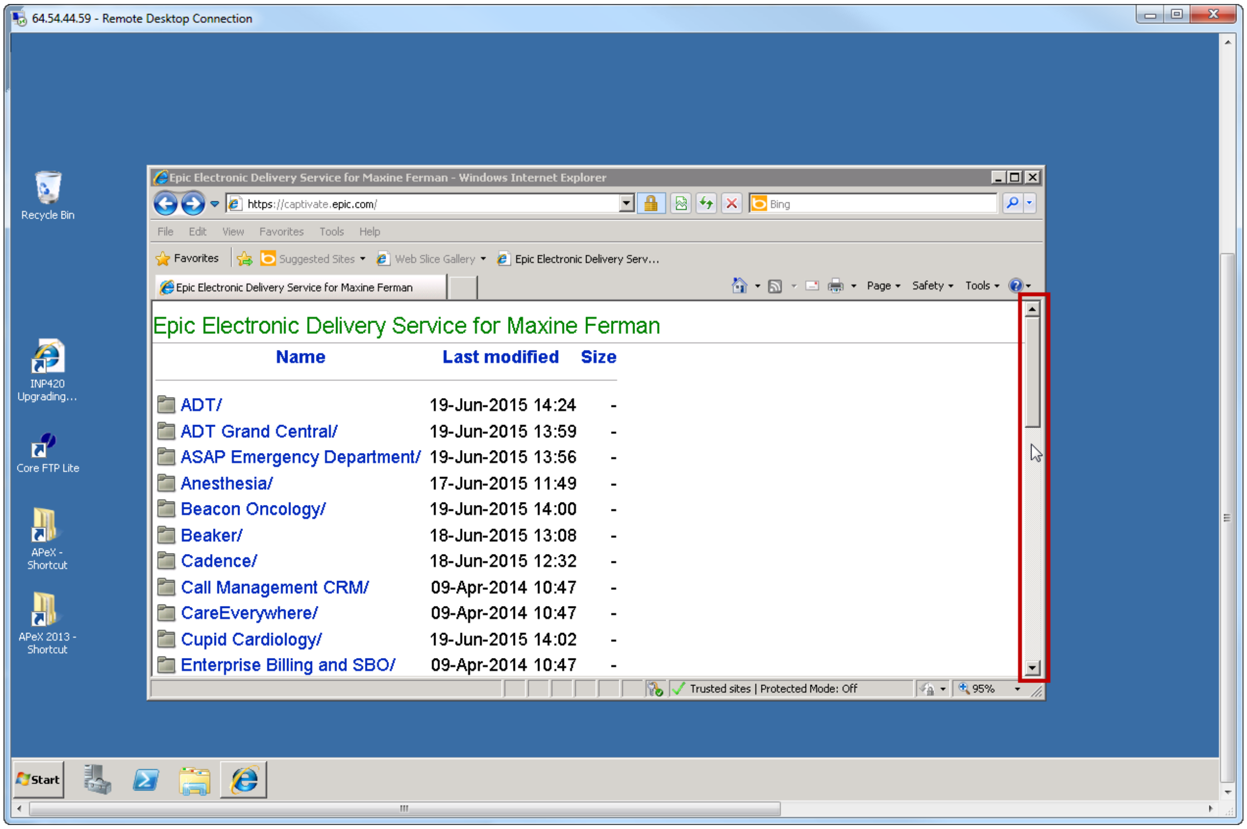


See Appendix 1

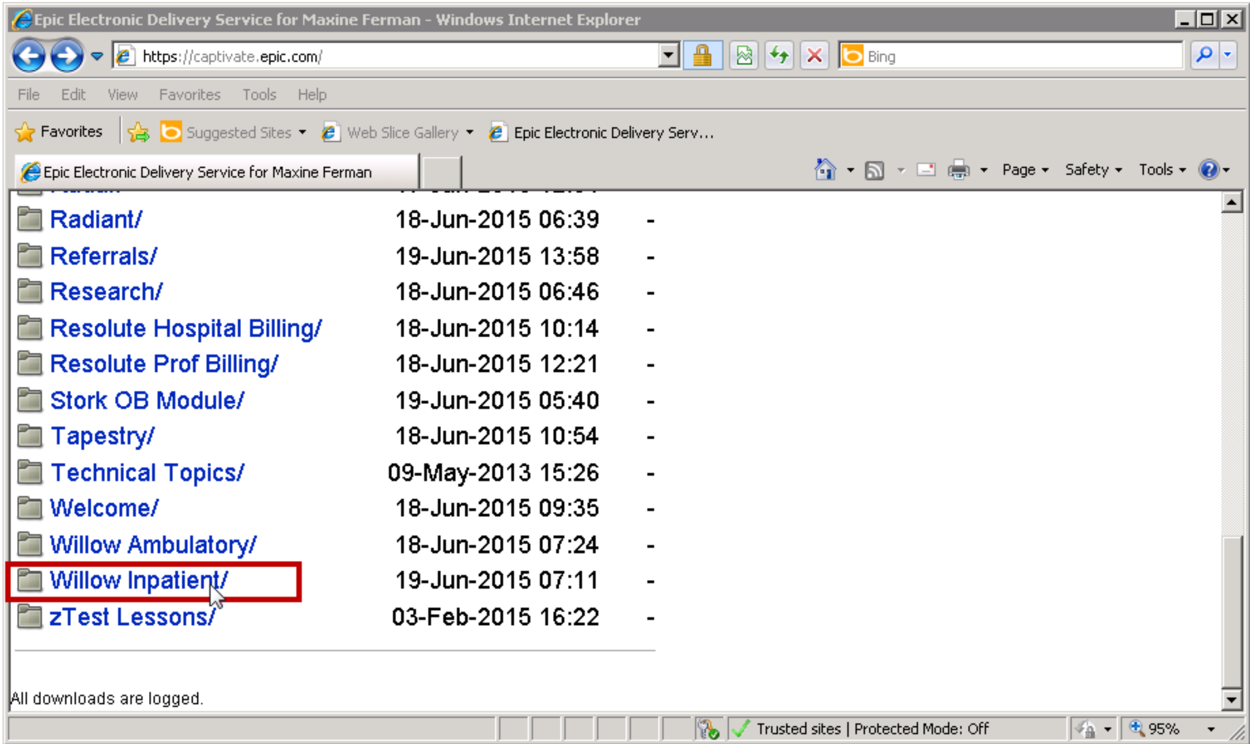
Document:	**Downloading Epic E-Learning Files**
Received:	10/23/15
FROM:	alissa@epic.com

You will see a list of EPIC topics in alphabetical order.

1. **SCROLL** to locate the correct directory.

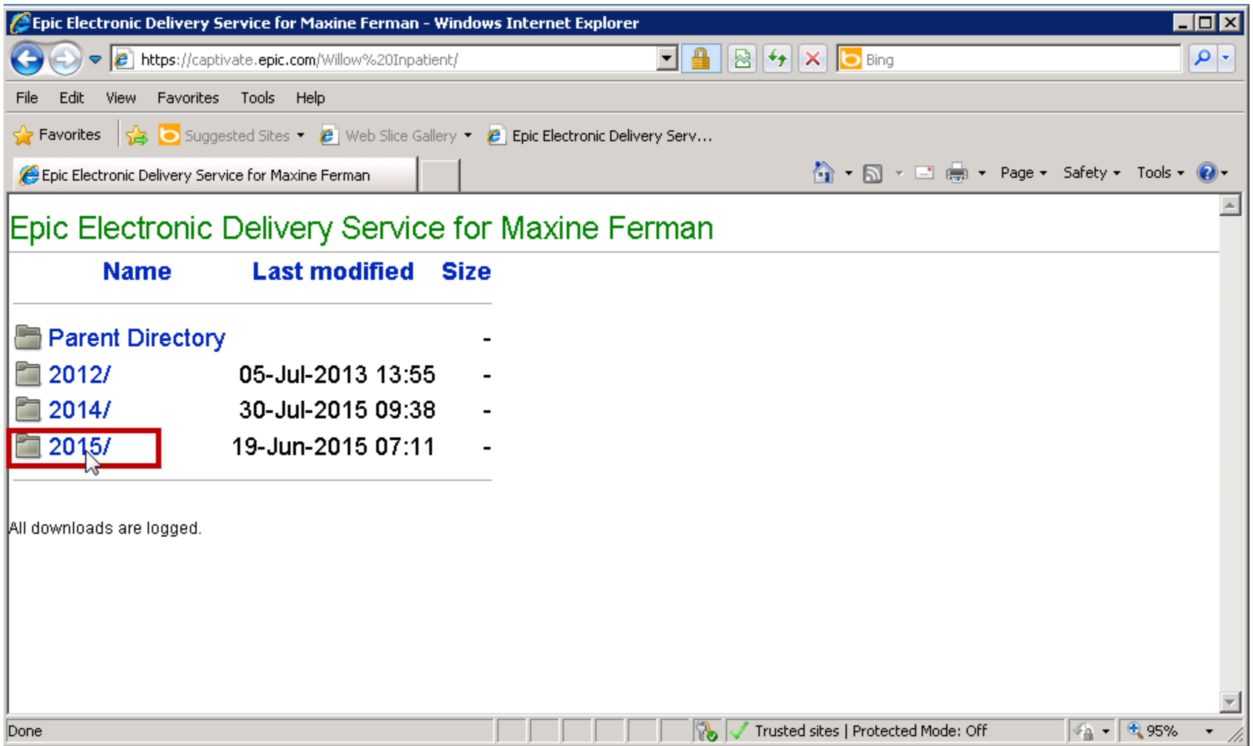


2. CLICK the EPIC topic for the eCourse.

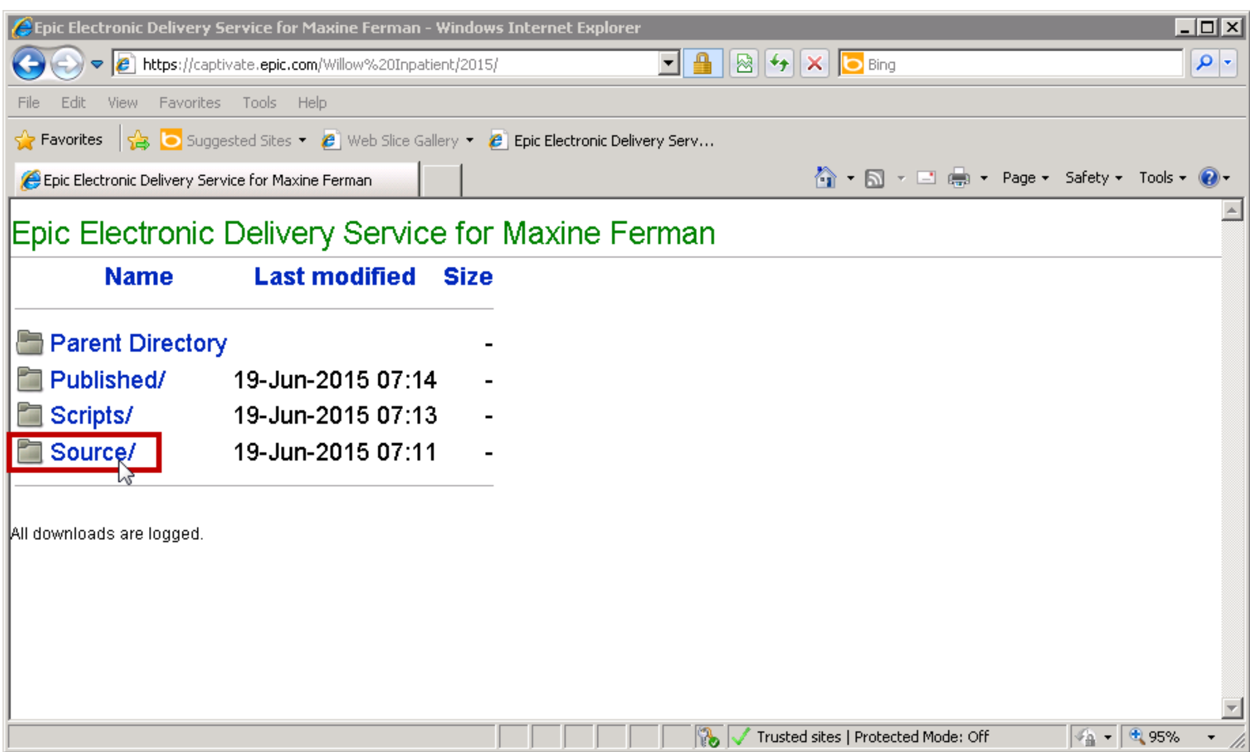


For security purposes, EPIC tracks all files that are download while you are logged in to your account.

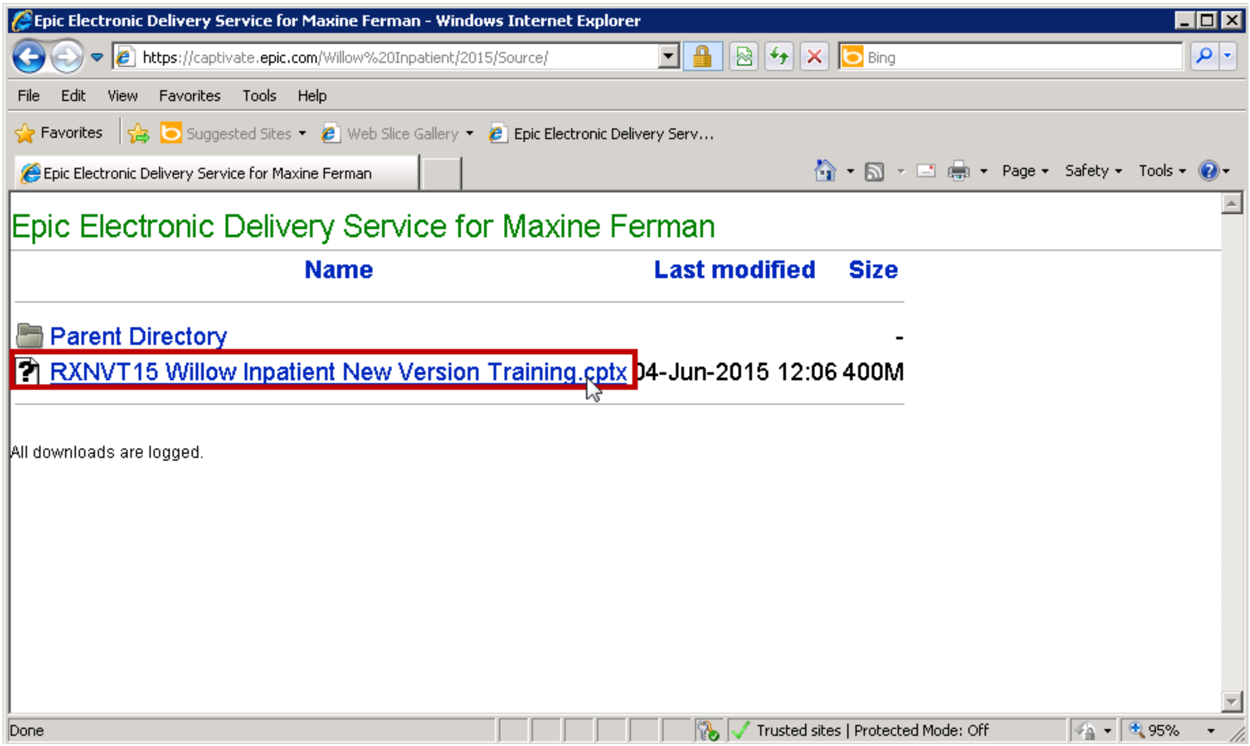
3. EPIC has organized its file structure by year. Locate the year that you are looking for, and **CLICK** to open.



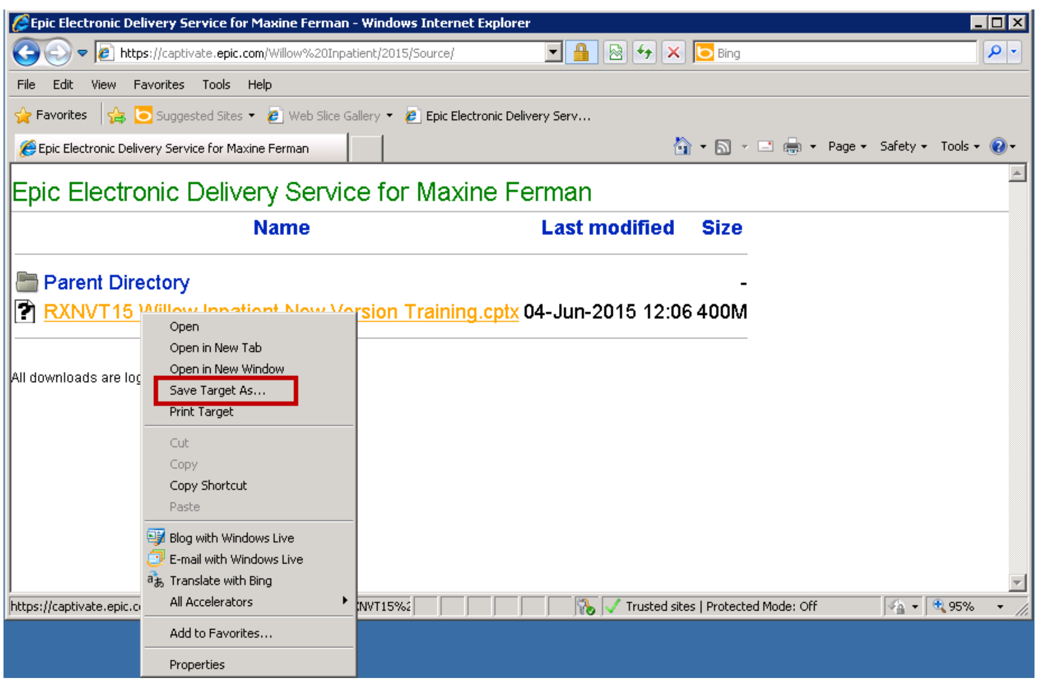
4. CLICK Source to access the .cptx files.



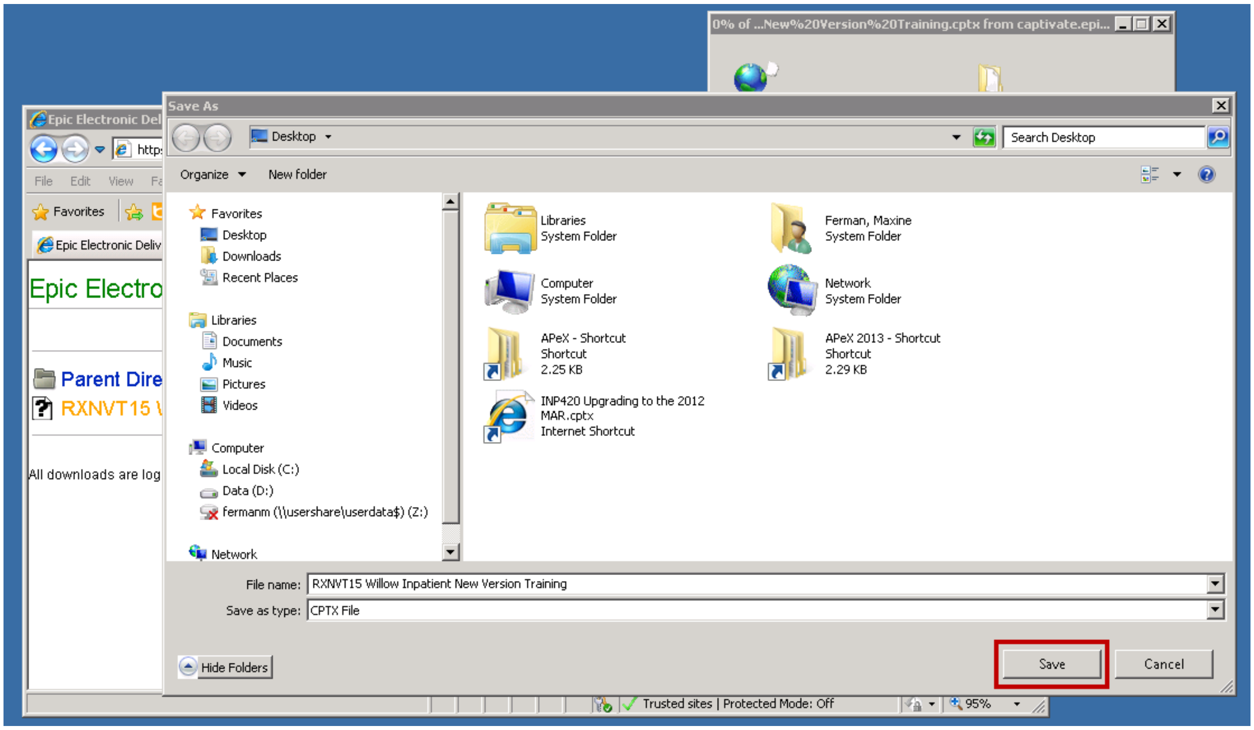
5. You can either **CLICK** or **RIGHT CLICK** to download the .cptx file.



- If you **Right Click**, **SELECT Save Target As (IE) or Save Link As (Firefox)**



6. Either way, navigate to the directory where you want to save the file and **CLICK SAVE.**



Repeat these steps for **EACH** file.

2

APeX Training

2. Captivate Settings and Requirements)

Whether you have customized a Captivate (.cptx) file **downloaded** from the EPIC Secure Server (Step 1), or have **developed** a Captivate eCourse, **APeX Training** has collaborated with **Learning Services** to establish requirements necessary to ensure that your eCourse will work successfully in SumTotal for all UCSF users.

APeX Training Captivate eCourse preferences and settings include:

- ❑ UCSF and **APeX branding**
- ❑ **EPIC Domain Validation Widget**
  See Appendix 1: Editing Captivate Files
- ❑ **EPIC Copyright** notice
  See Appendix 1: Adding A Copyright Statement To E-Learning Lessons
- ❑ Instructions to UCSF users to close the browser window" to "Complete" eCourse on final slide:
  i.e. Please close this window to successfully "Complete" this eCourse in the UC Learning Center.
- ❑ **SCORM 2004** settings as required for SumTotal.
- ❑ **Quiz** Reporting preferences (if applicable)
- ❑ **Playbar** and Interface settings
- ❑ **Closed Captioning** (required if audio and/or video is included)
- ❑ Other settings as required and tested for cross browser compatibility in SumTotal

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See Appendix 1

Document:	**Downloading Epic E-Learning Files**
Received:	10/23/15
FROM:	alissa@epic.com

See Appendix 2

Document: **e-Learning Quiz and Assessment Settings**
Received: 8/17/15
FROM: Edward.Knych@ucsf.edu - **APeX Training**

See Appendix 3

Document: **Pre-Publish Checklist and Quiz / Assessment Answer Key**
Received: 8/17/15
FROM: Edward.Knych@ucsf.edu - **APeX Training**

2.1 How to Publish a .cptx file for SumTotal

In order to package or prepare your .cptx file, you must **Publish** it as a **.zip** file that **Learning Services** will upload to SumTotal.

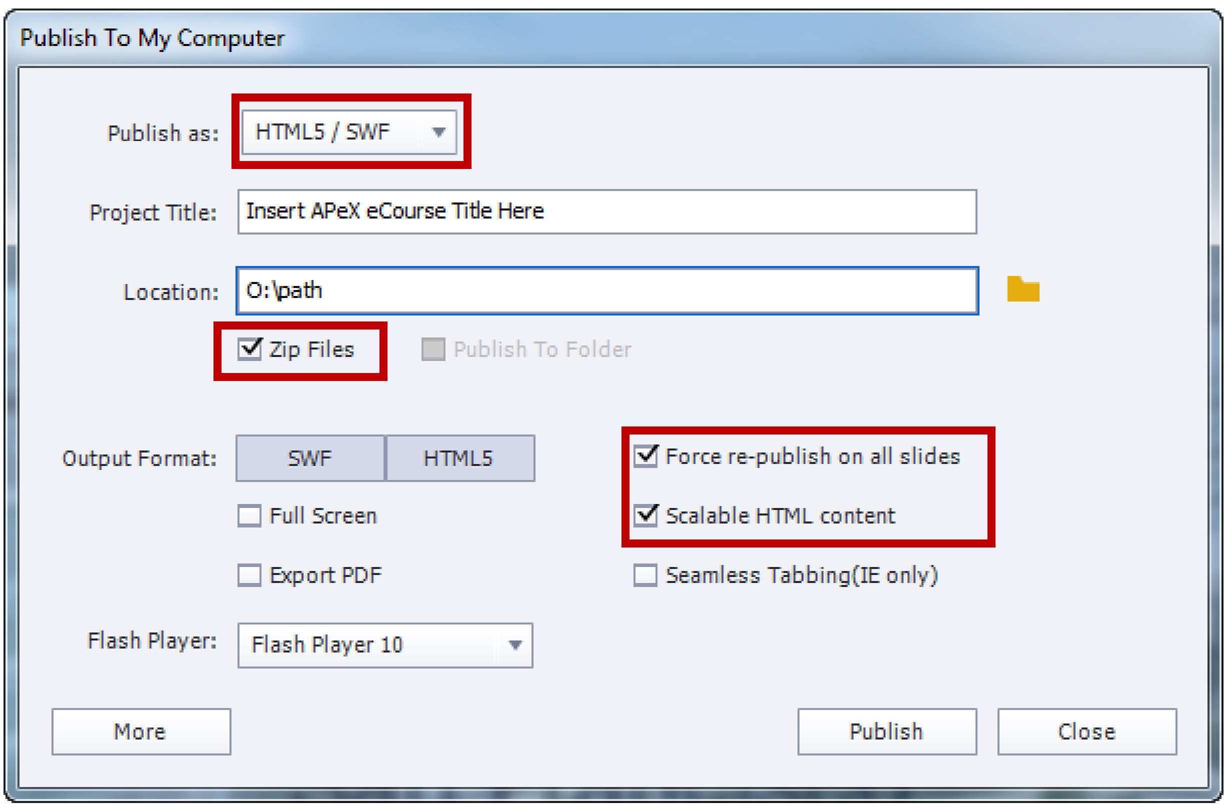
1. From the Captivate **File** menu **SELECT Publish**.
2. The **Publish To My Computer** dialogue box will open.
3. Please choose the following settings:

   ☑ **SELECT** Publish as: **HTML5/SWF**

   ☑ **Zip files**

   ☑ **Force re-publish on all slides**

   ☑ **Scalable HTML content**



3

APeX Training

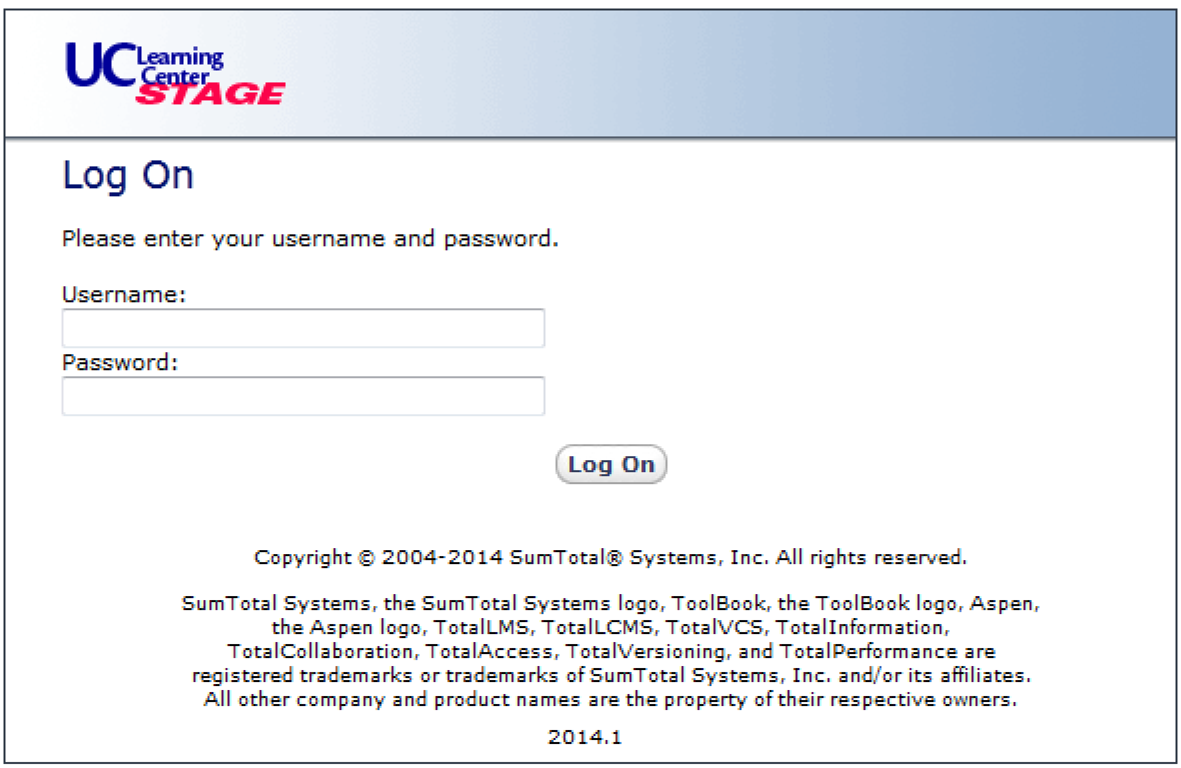
3. Upload ALL eCourses in SumTotal STAGE

To help expedite the launch process and ensure efficiency, **APeX Training** will need to **upload** and **TEST** the Captivate published **.zip** file for **EACH** eCourse in SumTotal STAGE **BEFORE** submitting files or initiating the launch process to **Learning Services**.

3.1 How to Upload an APeX eCourse to SumTotal STAGE for Testing

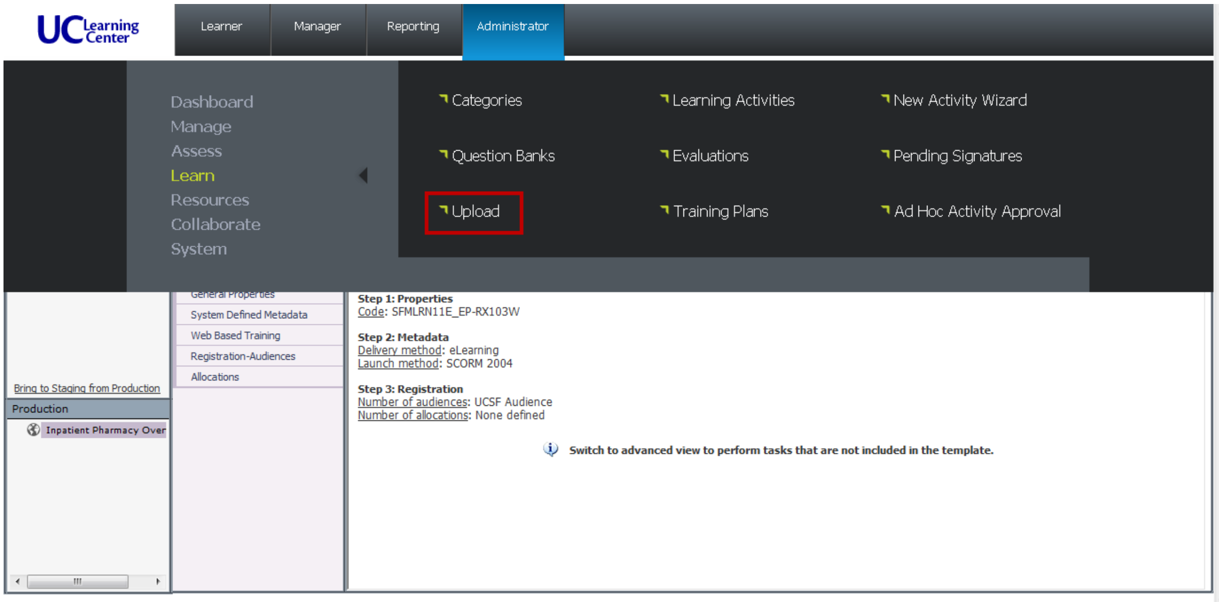
- **Upload** eCourses to SumTotal STAGE using **Internet Explorer**.
  SumTotal Administrator functions are **NOT compatible** with other browsers.
- To **TEST** each eCourse as a "Learner," you can login to SumTotal STAGE with **ANY** supported browser. (See Section 4)

1. **Login** to SumTotal STAGE with a supported version of **Internet Explorer**.

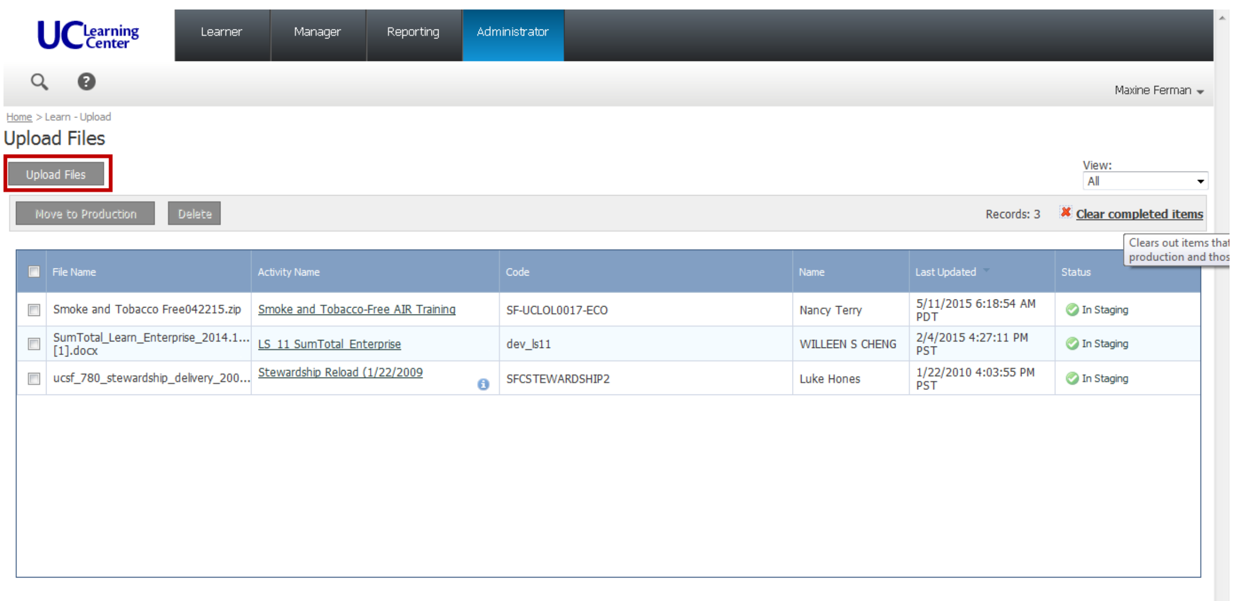


Please contact Chuck Green or Donna Chao if you need a new SumTotal STAGE login or password

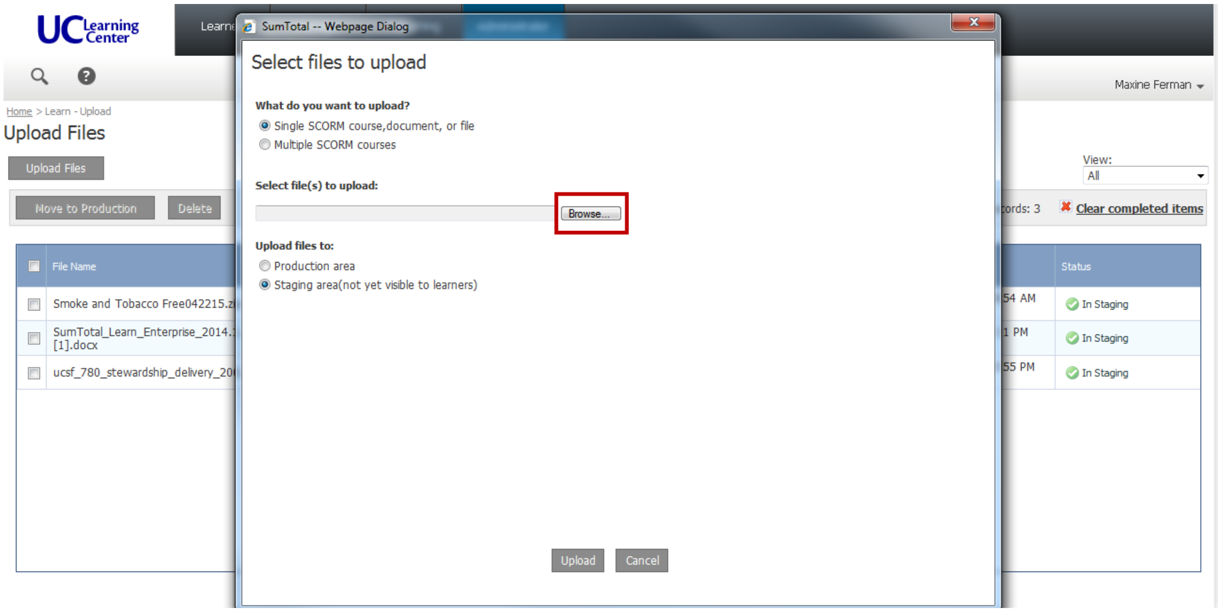
2. **SELECT Administrator > Learn > Upload.**



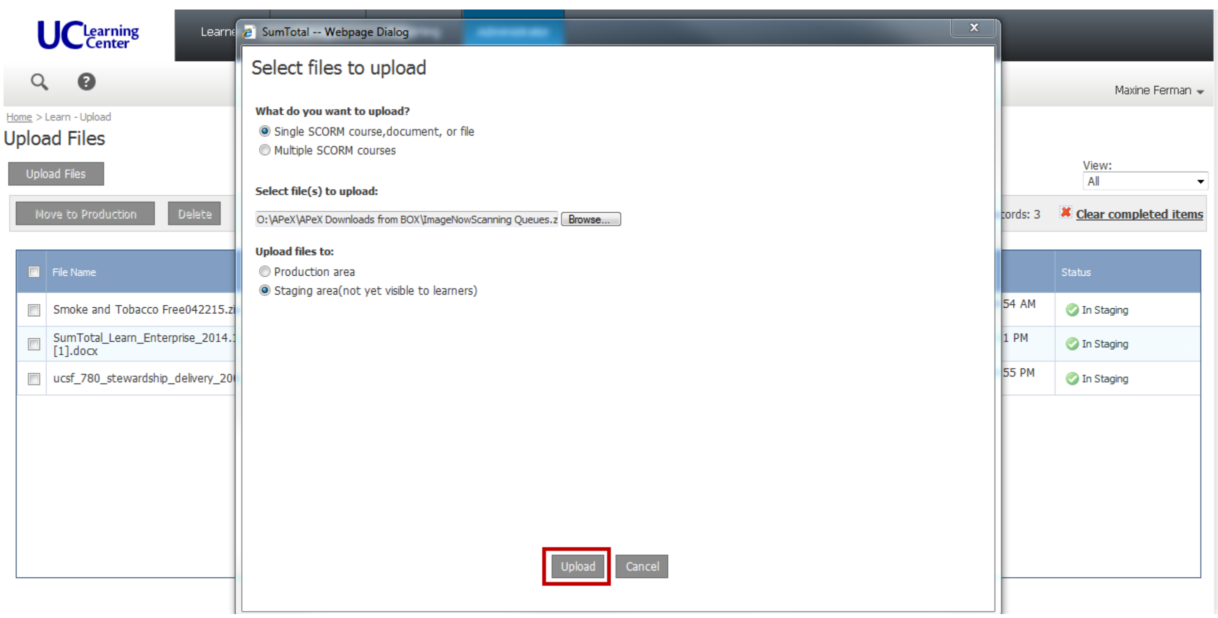
3. **CLICK** the **Upload Files** button.



4. **CLICK** the **Browse** button, and navigate to the **NEW** .zip file that you previously downloaded from the **APeX UCSF BOX** to your computer or network.



5. **CLICK** the **Upload** button



After the file is uploaded, the **Specify file properties** Dialogue Box will automatically open.

3.2 Specify File Properties Settings

1. **TYPE** in the **Activity name** field using this naming protocol:

   APeX Developers Initials - Course Title - TEST - month/day/year

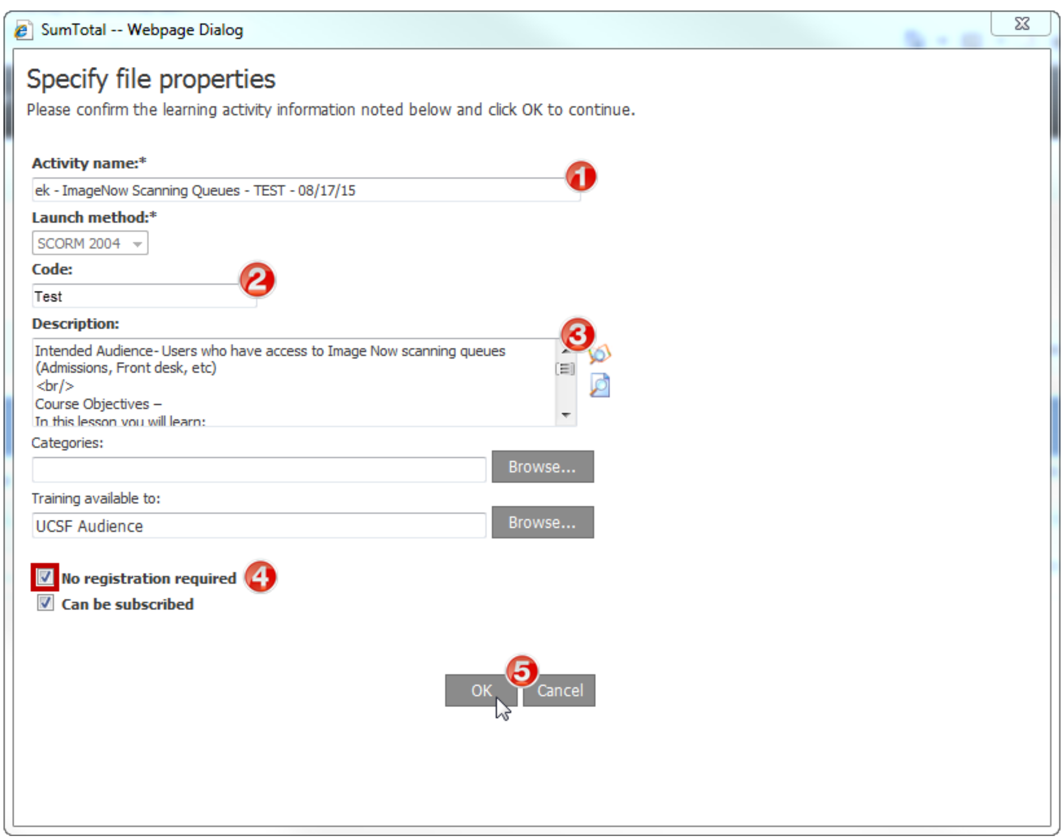
   Naming eCourses consistently, logically and in a predictable way will allow you (and users) to easily search and find each eCourse later for testing.

2. **TYPE** the word “Test” in the **Code** field.

3. **PASTE** the **Audience**, **Description** and **Course Length.**
   - You many need to add html to format text and bulleted lists.
   - Include the following tag Line:
     For questions about APeX training, please contact the APeX Provider Training Hotline at (415) 514-8797.
     ©2015 Epic Systems Corporation and UCSF Medical Center. Confidential.
     This material should be stored securely and may not be distributed publicly.

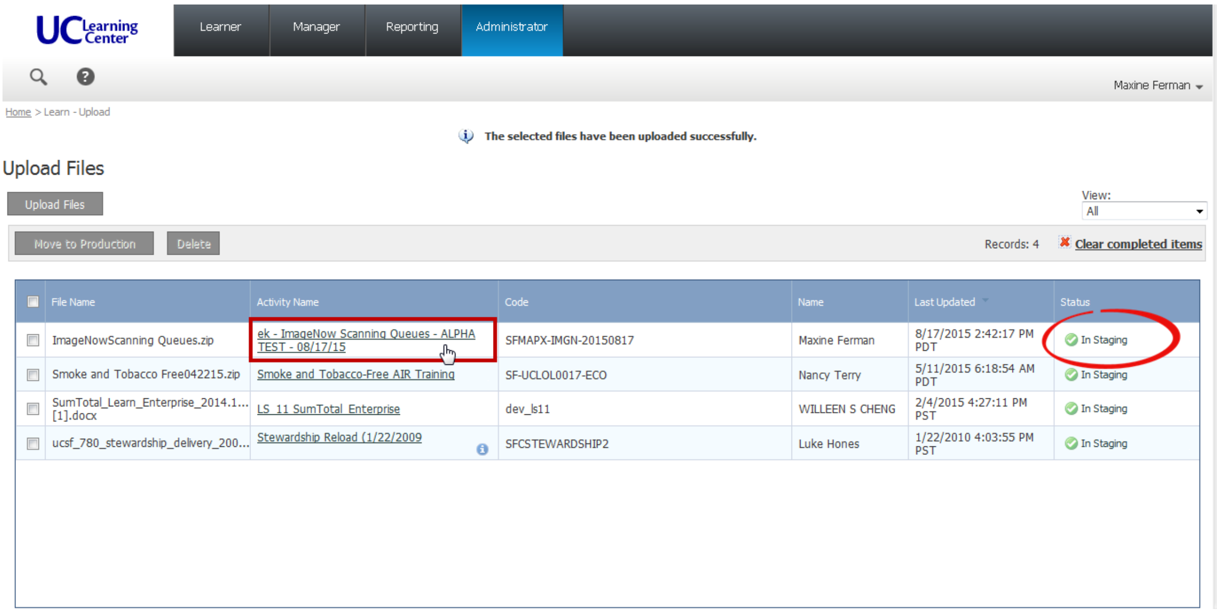
4. **CLICK** the Check Box to activate **No registration required.**

5. **CLICK** the **OK** button.



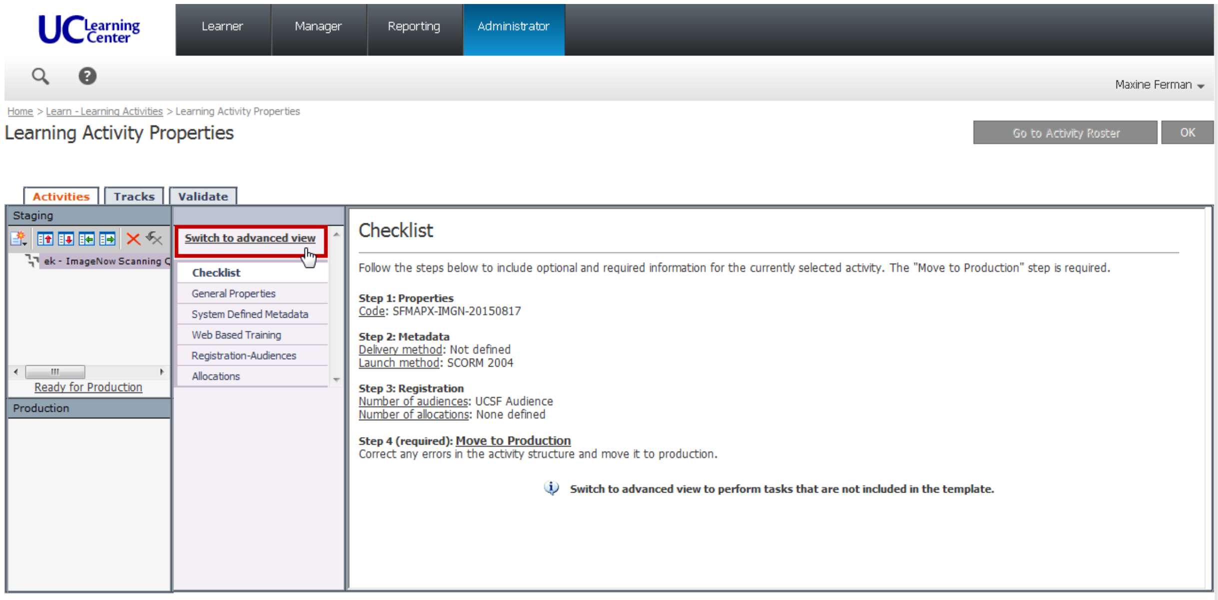
It may take a few minutes to process the file upload.

When the file **Status** changes to "**In Staging**," **CLICK** the **Activity Name** to go to the **Learning Activity Properties** section.



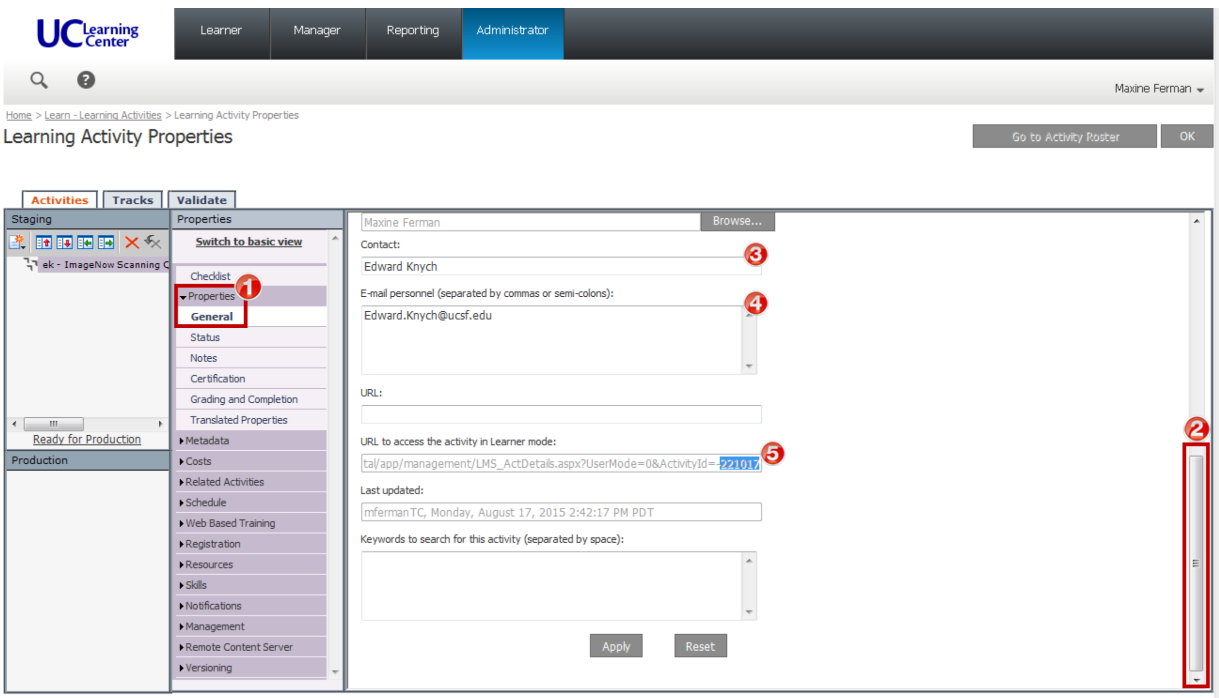
3.3 Learning Activity Properties Settings

1. **CLICK Switch to Advanced View** to access all necessary settings.



3.3.1 Properties Section

1. **CLICK Properties > General** to access these settings.
2. Confirm all data previously entered, and **SCROLL** down to access more fields.
3. **TYPE** the **APeX Contact** name.
4. **TYPE** the **APeX Contact E-mail** address.
5. **SELECT** the last 6 digits of the **URL to access the activity in Learner Mode.**
6. **COPY (Ctrl + C)** the **SELECTED** text and paste in an email for later.



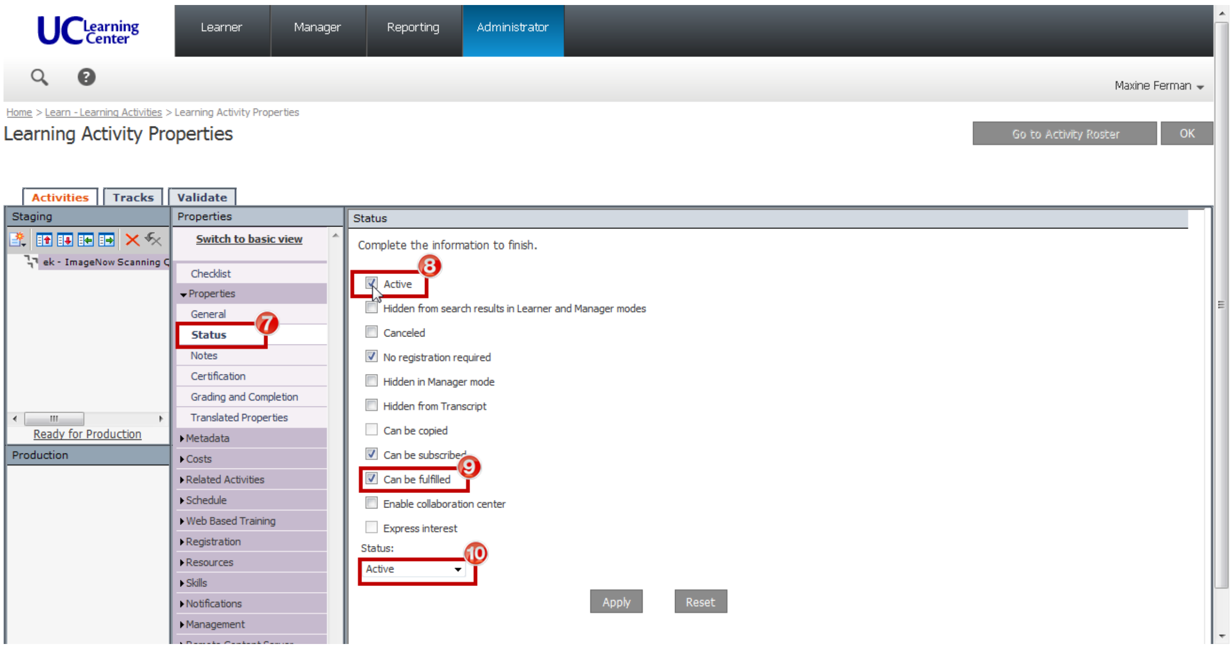
7. CLICK Status

8. CHECK the **Active** checkbox**.**

No registration Required and **Can Be Subscribed** are already **CHECKED** by default.

9. CHECK the **Can be fulfilled** checkbox.

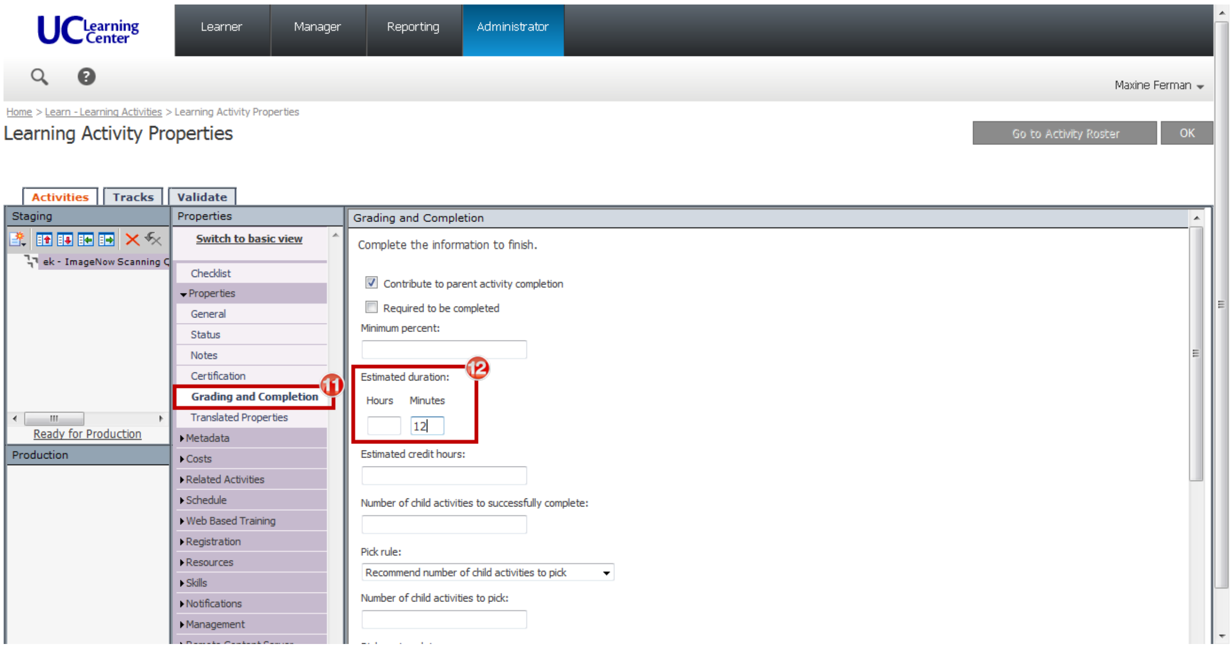
10. Change **Status** from None to **Active.**



11. CLICK Grading and Completion.

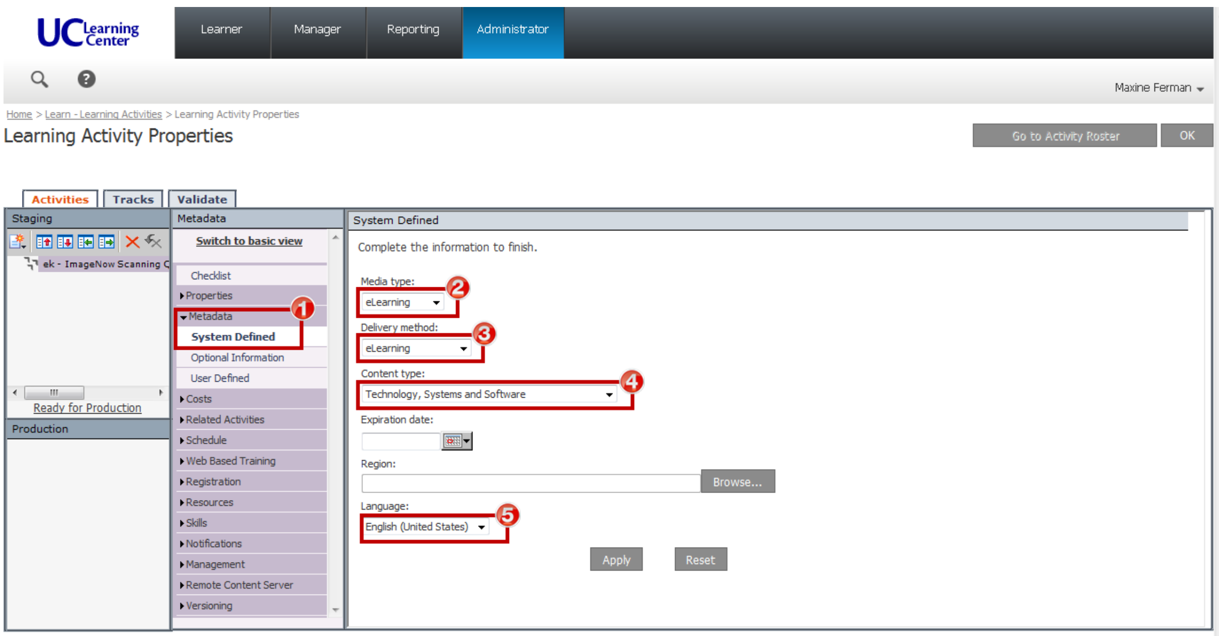
12. TYPE Estimated Duration to include **Hours** and **Minutes** as provided in the launch initiation EMAIL sent by **APeX Training.**

- All other required settings are **CHECKED** by default.



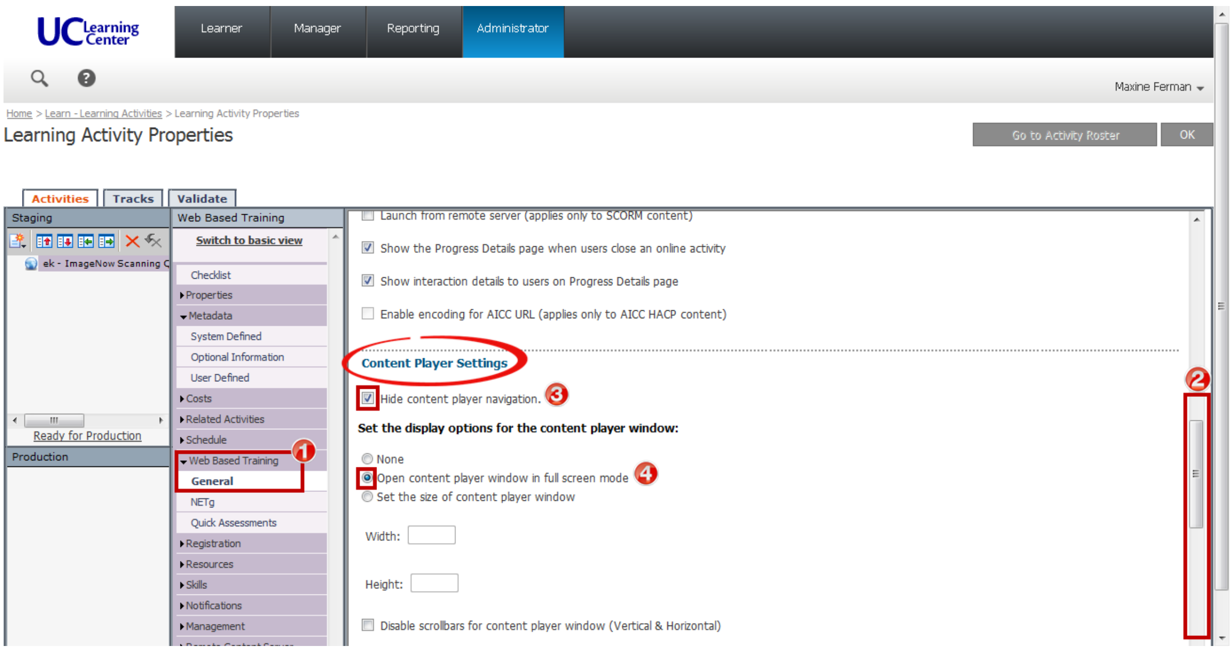
3.3.2 Meta Data Section

1. **CLICK Metadata > System Defined** to access these settings.
2. **SELECT** Media type: **eLearning.**
3. **SELECT** Delivery method: **eLearning.**
4. **SELECT** Content type: **Technology, Systems and Software.**
5. **SELECT** Language: **English (United States).**



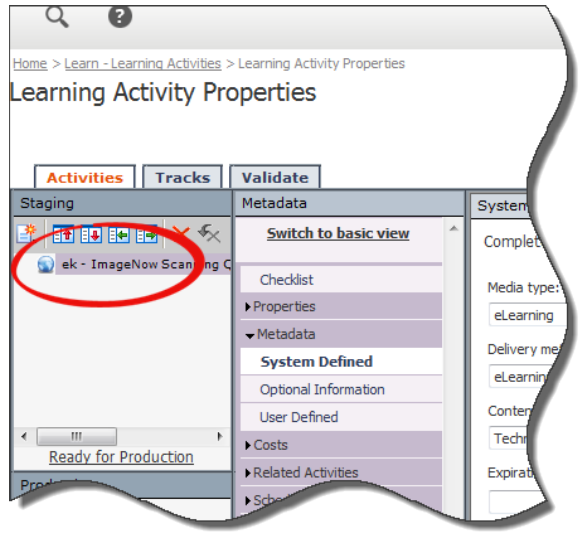
3.3.3 Web Based Training Section

1. **CLICK Web Based Training > General** to access these settings.
2. **SCROLL** down to the Content Player Settings section.
3. **CHECK** the **Hide content player navigation** checkbox
4. **CLICK** the **Radio Button** to **Open content player window in full screen mode**
   - All other required settings are **CHECKED** by default.



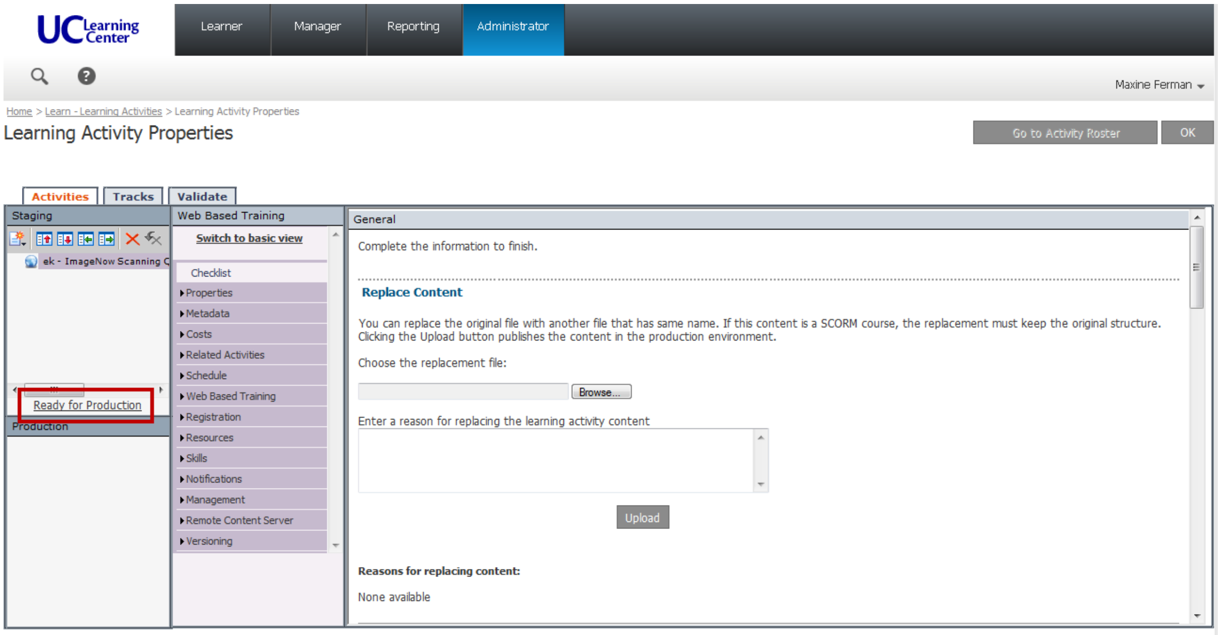
⚠ Confirm that settings have been made correctly in all sections.

Notice the icon has changed to eLearning in the Staging area.

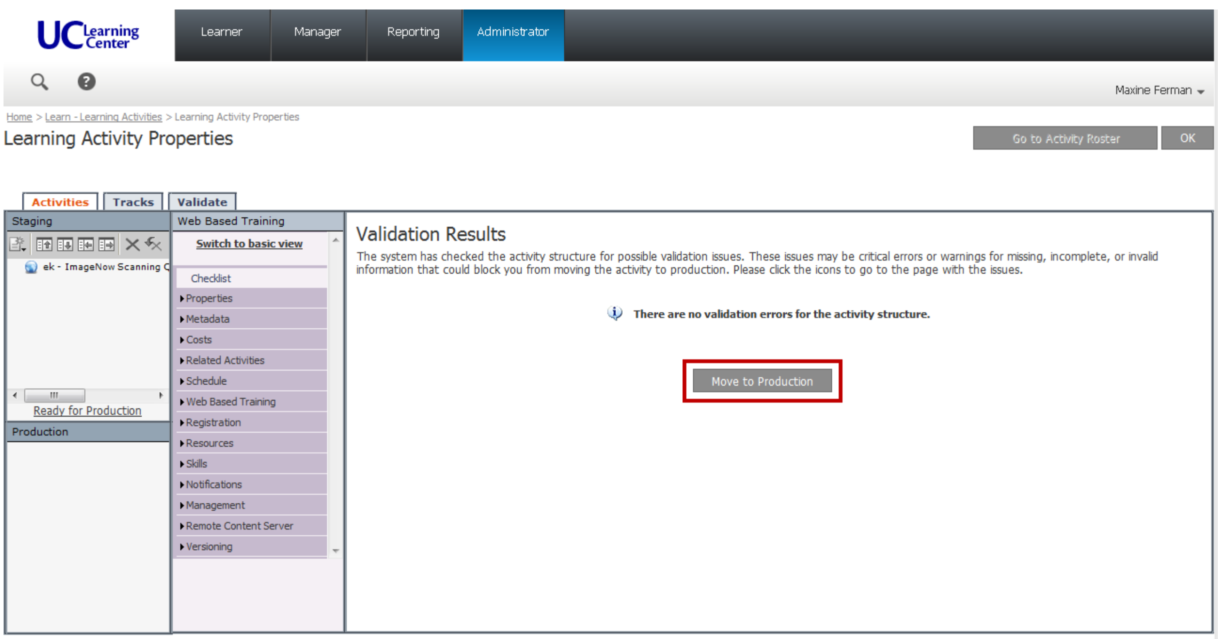


3.3.4 Move eCourse into Production

1. **CLICK Ready for Production.**



2. **CLICK** the **Move to Production** button.



4

APeX Training

4. Test each eCourse in SumTotal STAGE

BEFORE APeX Training submits any files and initiates the launch process with **Learning Services**, it is important that **APeX Training TEST** each eCourse in SumTotal STAGE.

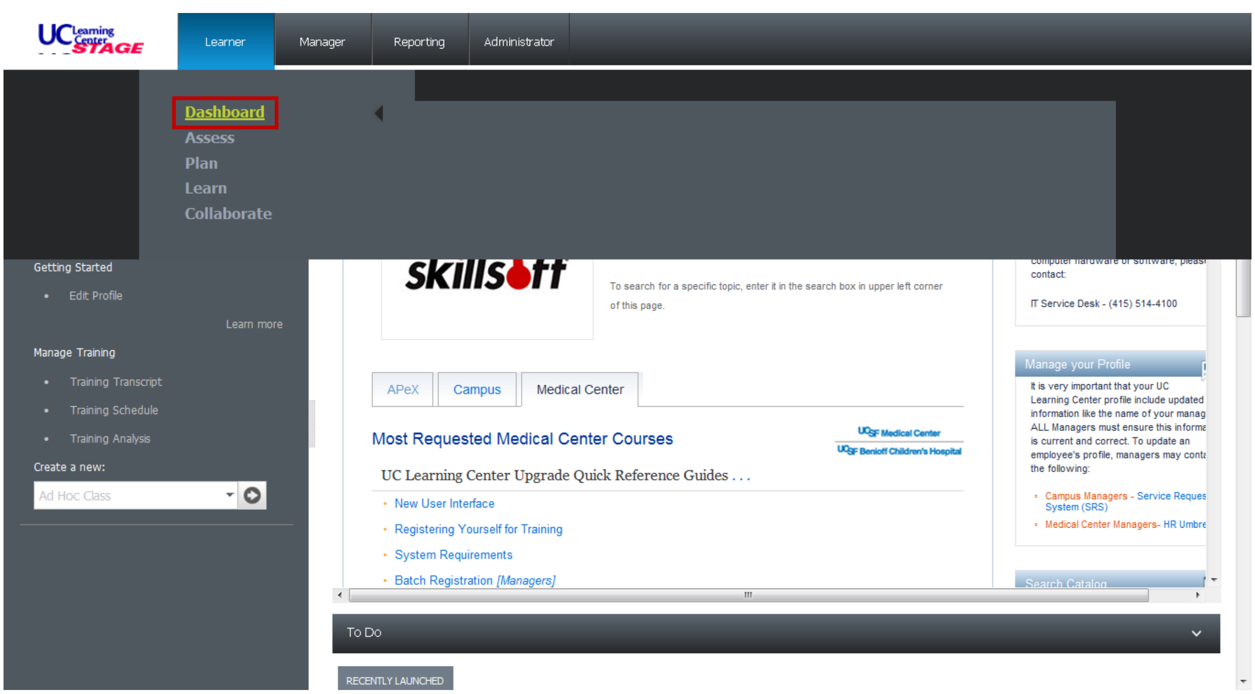
To help expedite the launch process, and ensure a quality experience for all UCSF users, please test each eCourse using **ALL** supported operating systems and browsers. (See UC Learning Center Supported Browsers)

After **APeX Training** has moved the eCourse into Production of SumTotal STAGE (Section 3), you can begin to **TEST EACH** eCourse as a "Learner."

To **TEST** each eCourse as a "Learner," you can login to SumTotal STAGE with **ANY** supported browser.

- Administrator functions like "Upload" course are only available using **Internet Explorer**.

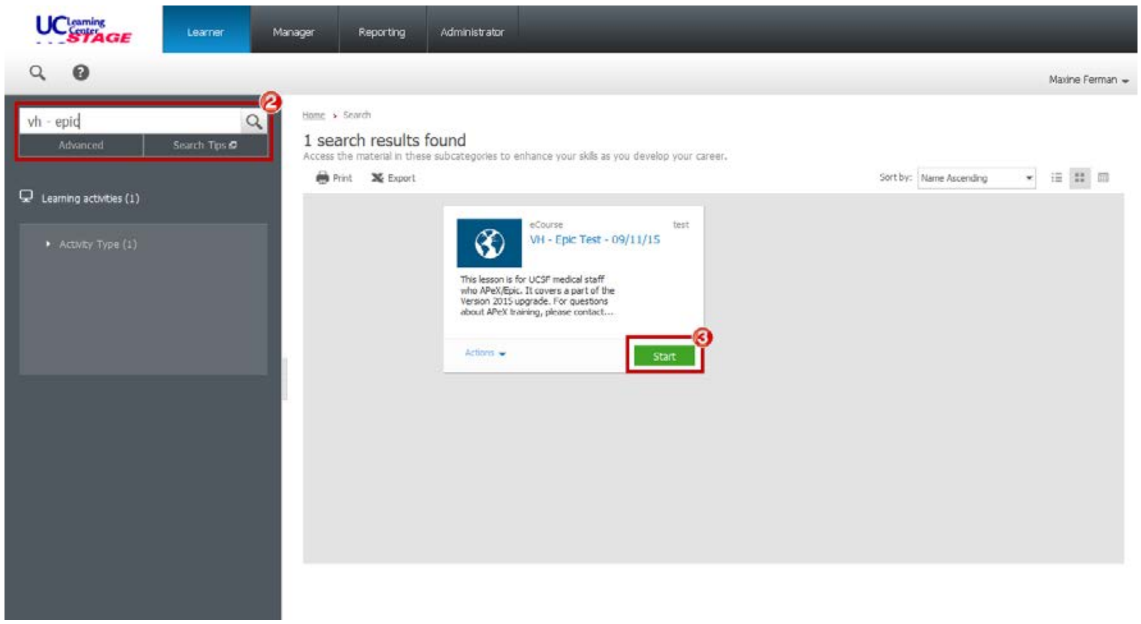
1. SELECT Learner > Dashboard



2. **SEARCH** for your initials and/or the name of your eCourse.

   To easily locate each eCourse for testing, we suggest that you use your initials in the naming protocol when uploading eCourses to SumTotal STAGE. (See Section 3.2.1)

3. Locate your eCourse and **CLICK** the **Start** button to begin TESTING.



APeX Training has established specific criteria and benchmarks required to test all **APeX** eCourses in SumTotal. (See Appendix 4)

If the eCourse **DOES NOT** pass the established TEST QA criteria, **APeX Training** must **REPEAT Sections 2 thru 4** to revise, upload and retest **EACH** eCourse in supported operating systems and browsers.

See Appendix 4

Document:	**e-Learning Testing Instructions**
Received:	8/17/15
FROM:	Edward.Knych@ucsf.edu - **APeX Training**

5
APeX Training

5. Upload .zip files to UCSF BOX

After **APeX Training** has successfully tested and approved each eCourse in SumTotal STAGE, **APeX Training** will need to transfer the published Captivate .zip file to **Learning Services** to upload to SumTotal Production.

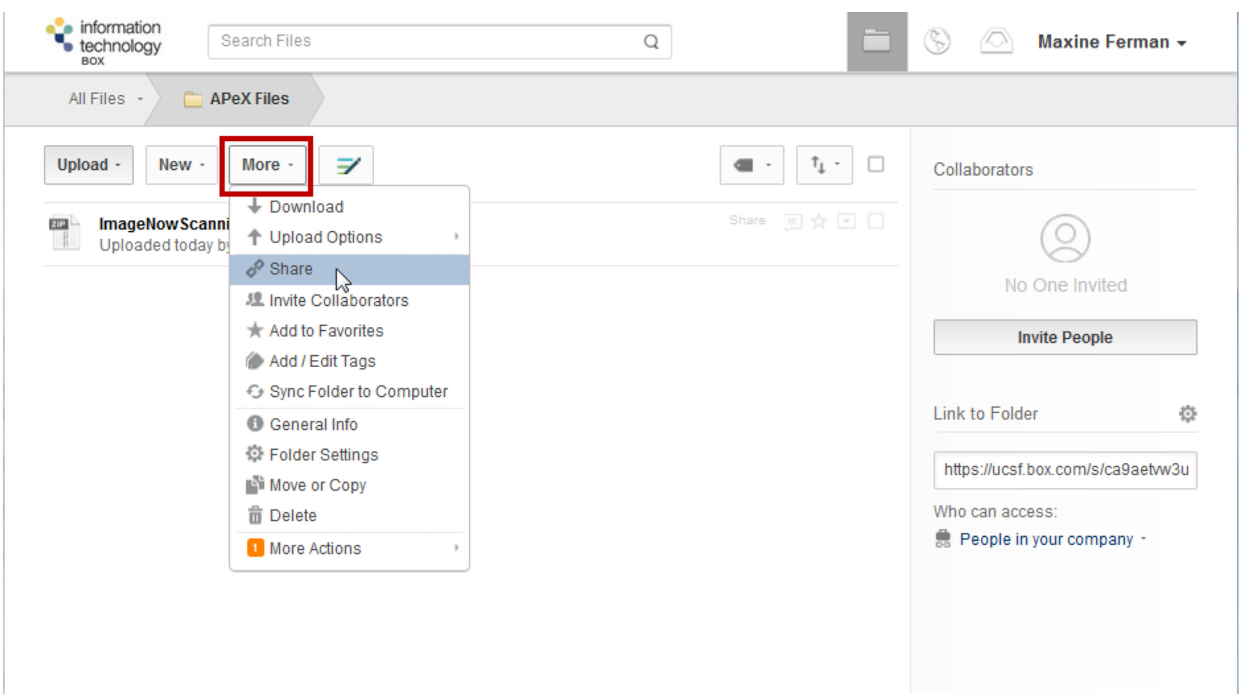
To transfer files to **Learning Services,** the **APeX Training** contact will upload **EACH .zip** file to a **UCSF BOX**.

Contact IT Services if you have any questions regarding your access to **UCSF BOX**.

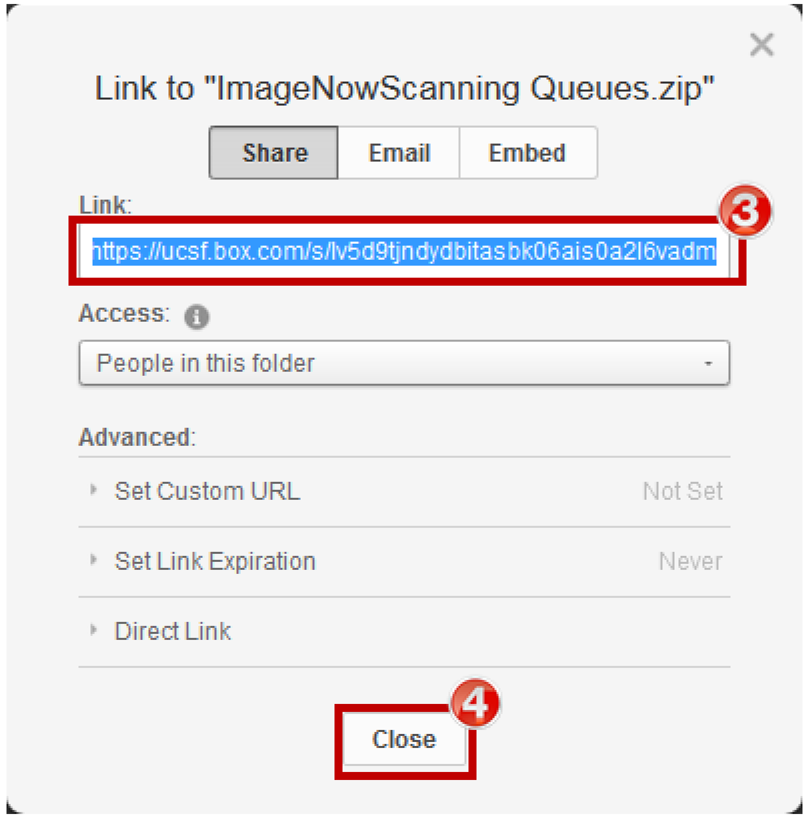
5.1 How to COPY the LINK for EACH .zip file in your UCSF BOX

You will need to send the **LINK** of **EACH .zip** file to the **Learning Services** contact.

1. **CLICK** the **More** button.
    - You may also **RIGHT CLICK** on the **.zip** file.
2. **CLICK Share** from the menu.



3. **COPY** the complete address from the LINK field.
4. **CLOSE** the dialogue box.
5. **PASTE** the LINK in an EMAIL to use later.

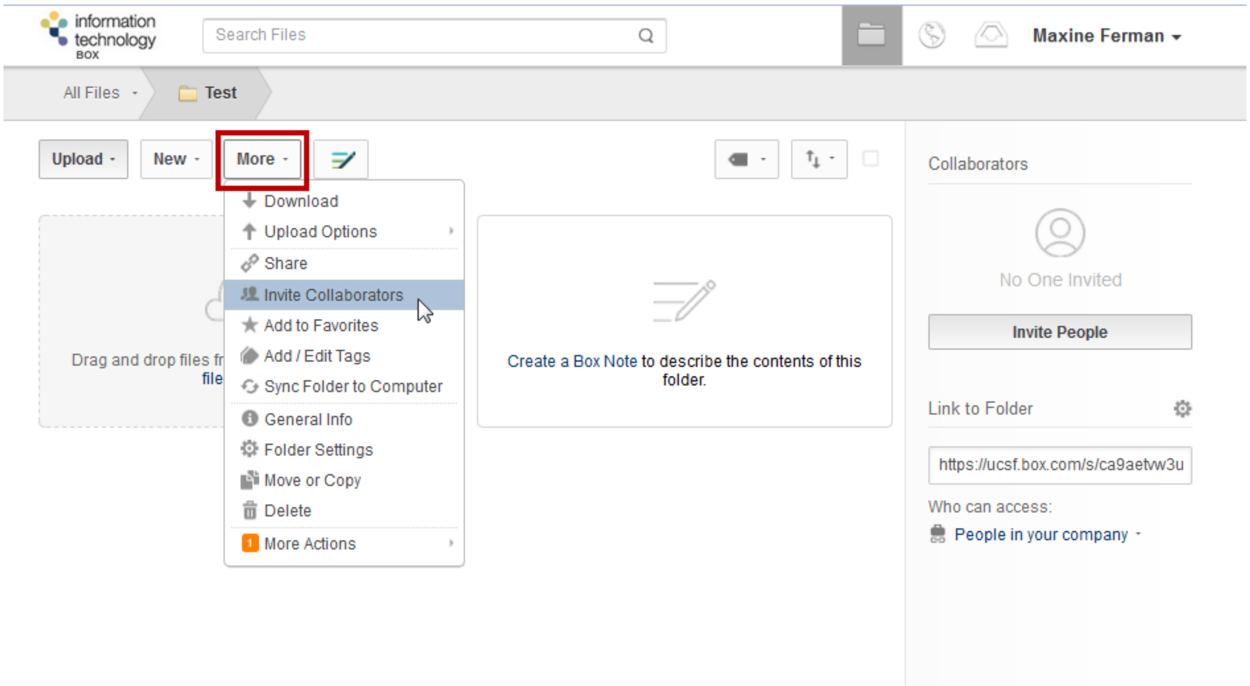


(OPTIONAL)

To share your **UCSF BOX** with the assigned **Learning Services** contact(s):

1. **CLICK** the **More** button

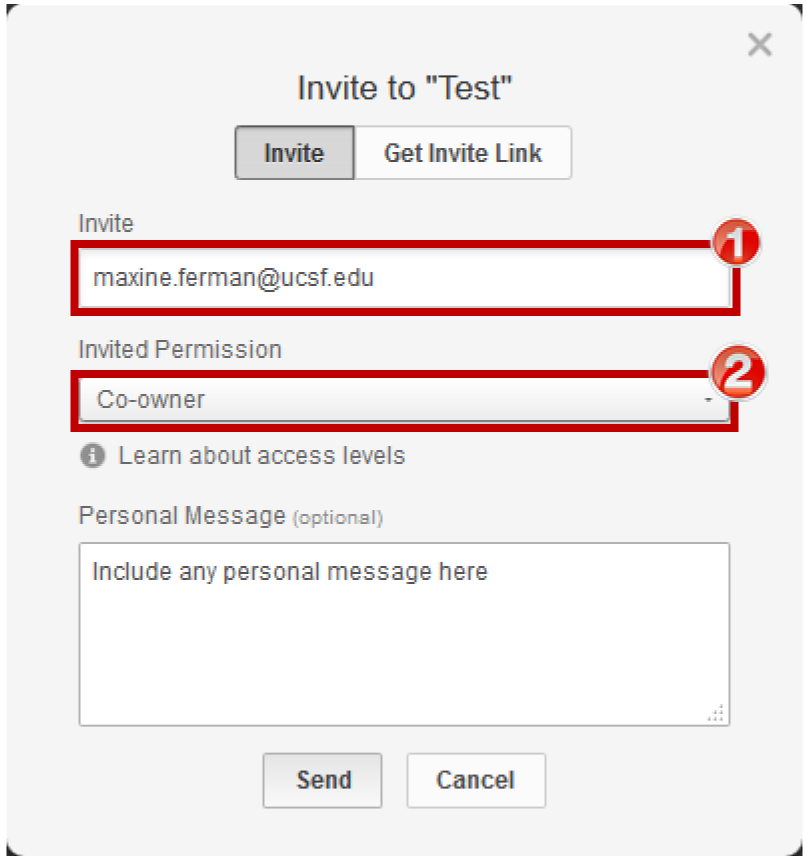
2. **SELECT Invite Collaborators** to allow the **Learning Services** contact full access to your **.zip** files.



At this time, Maxine Ferman from **Learning Services** has been assigned as the contact for **APeX Training**.

1. **TYPE:** maxine.ferman@ucsf.edu

2. **SELECT Co-owner** from the **Invited Permission** menu.



6
APeX Training

6. Initiate the eCourse Launch Process with Learning Services

After you have uploaded all of the **.zip** files to the **UCSF BOX**, you need to **EMAIL** the assigned **Learning Services** contact to initiate the **Launch Process** for each eCourse in SumTotal.

Please plan **3-5 business days** to complete the **Launch Process** in SumTotal.

Please let the **Learning Services** contact know when/if you will be **UNAVAILABLE** to TEST the eCourses in SumTotal during the 3-5 day **Launch Process**.

✉ Please send an **EMAIL TO Learning Services** contact (maxine.ferman@ucsf.edu and **CC**: natalie.haas@ucsf.edu) for **EACH .zip** file, and include the following information:

- ❑ eCourse **Title**
- ❑ Course **Code**

> The **APeX Training** contact must specify if this is either a **NEW** or **REPLACEMENT** eCourse.
>
> If this is a **REPLACEMENT** eCourse, please **SPECIFY** the existing **Title** and **Course Code** as currently listed in SumTotal. **OR**
>
> If this is a **NEW** eCourse, please specify that a **NEW Course Code** is to be generated by **Learning Services**.

- ❑ **Audience**
- ❑ eCourse **Description**
- ❑ eCourse **Duration**
- ❑ **Answer Key** (if applicable)
- ❑ **Launch Date** requirement
- ❑ **UCSF BOX LINK** to corresponding **.zip** file
  See **3.1 How to COPY the LINK for EACH .zip file in your UCSF BOX**

7

Learning Services

7. SumTotal Requirements and Settings

This section includes all requirements and settings necessary to upload a Captivate Published .zip file and successfully launch it as an eCourse in SumTotal.

Preparation

Before you can begin to work with SumTotal, you must first **DOWNLOAD** the Captivate Published **.zip** file from **UCSF BOX**, and also generate a **Course Code**.

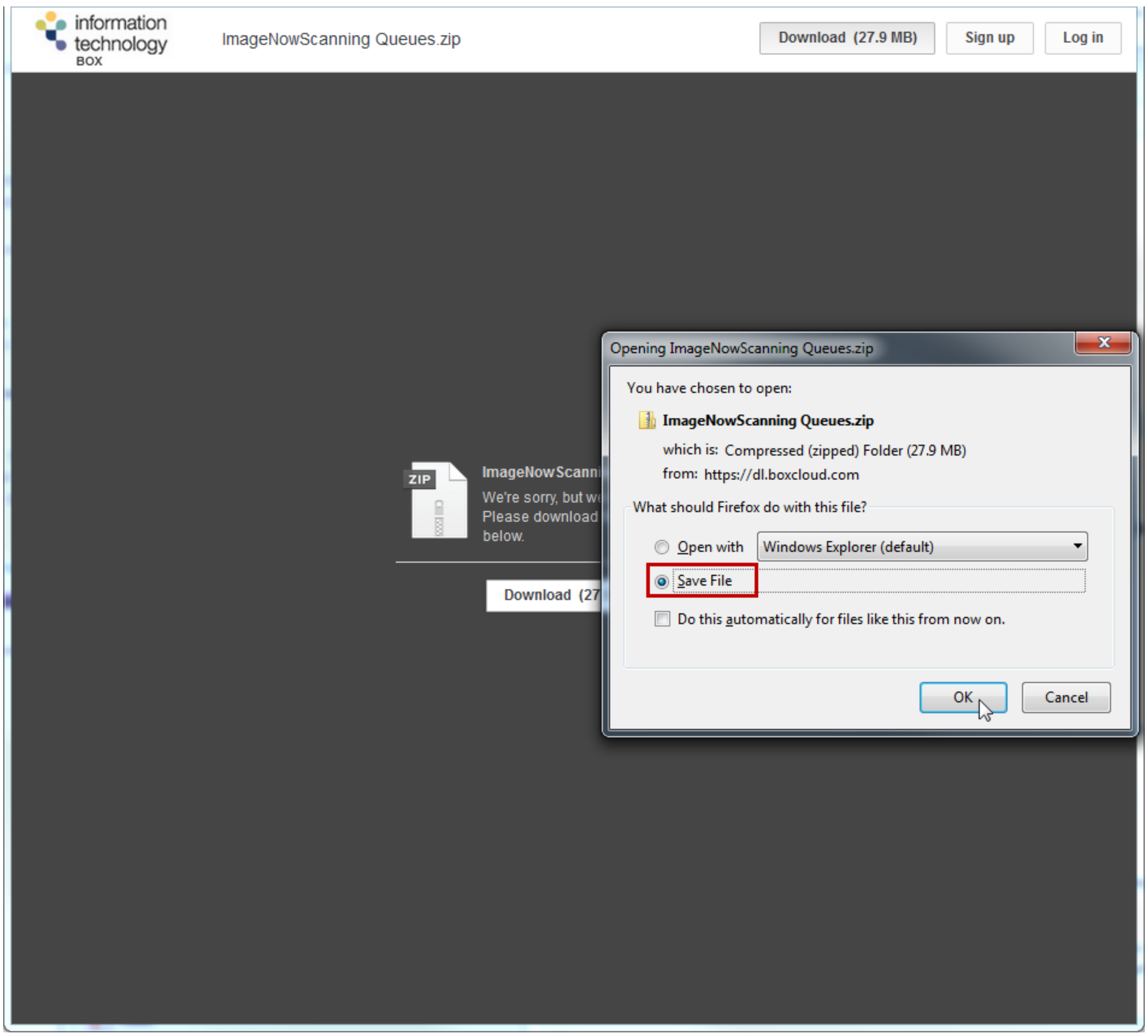
7.1 How to Download the Captivate Published .zip file from UCSF BOX

1. Upon receipt of the email from **APeX Training** (Step 4), **CLICK** the link included to go directly the **UCSF BOX** website.

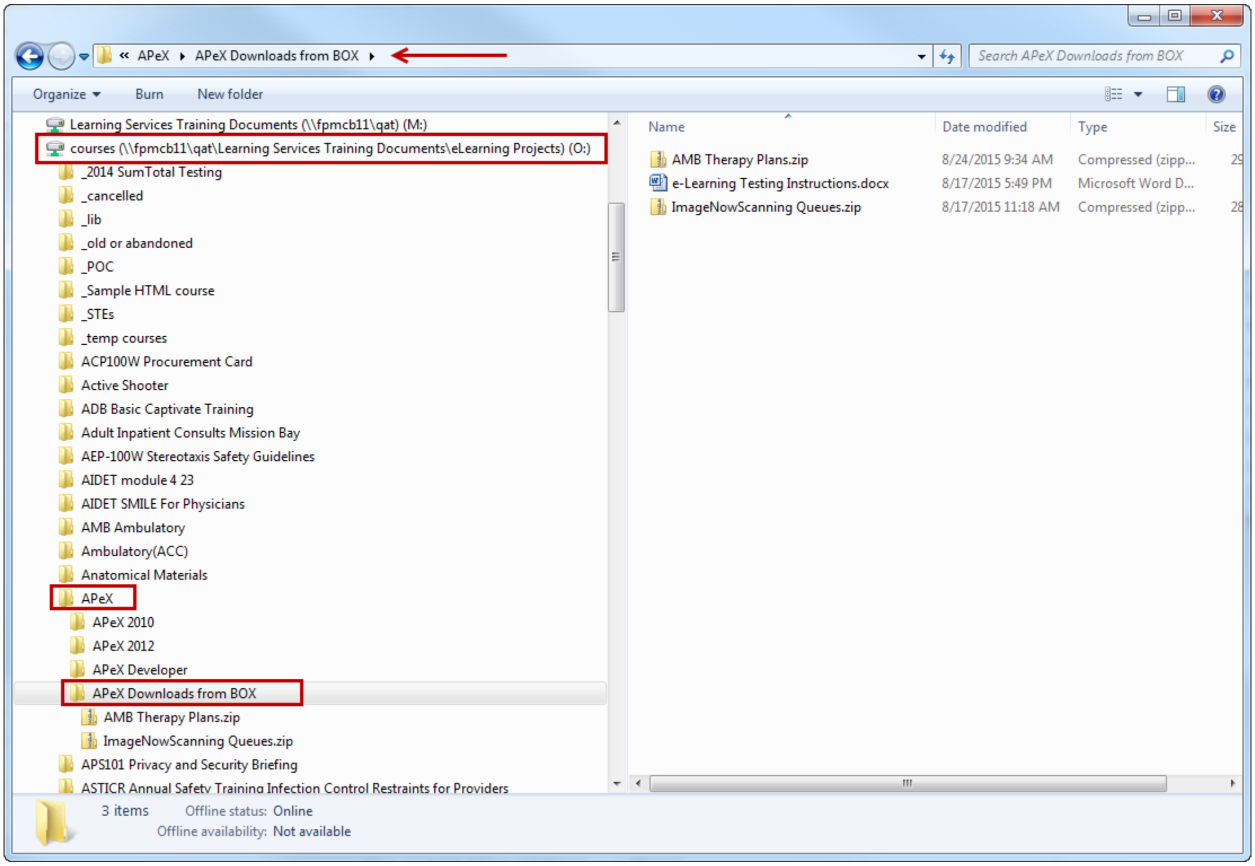
2. **CLICK** the **Download** button.

3. **SELECT** the **Save File** radio button.
   ⚠ **DO NOT** select the **Open with** radio button.

4. **CLICK OK**



5. Navigate to the Learning Services network directory:
courses (\\fpmcb11\qat\Learning Services Training Documents\eLearning Projects) (O:)\APeX\APeX Downloads to **SAVE** the **.zip** file for later use in this section.



7.1.1 How to Generate a Course Code for a NEW and Replacement APeX eCourse

A unique Course Code is required for **EACH** course offered in SumTotal. Course Codes allow us to track and manage individual courses, and is required to generate Reports in SumTotal.

As of January 2015, **ALL** UCSF courses offered in SumTotal must follow the new Course Code Scheme. Please see LMS course code scheme document.

⚠ **Learning Services** **MUST** generate a NEW course code when uploading all **NEW** and **REPLACEMENT** **APeX** eCourses in SumTotal.

Learning Services has developed and maintains an automated **Course Code Generator** to be used in this process.

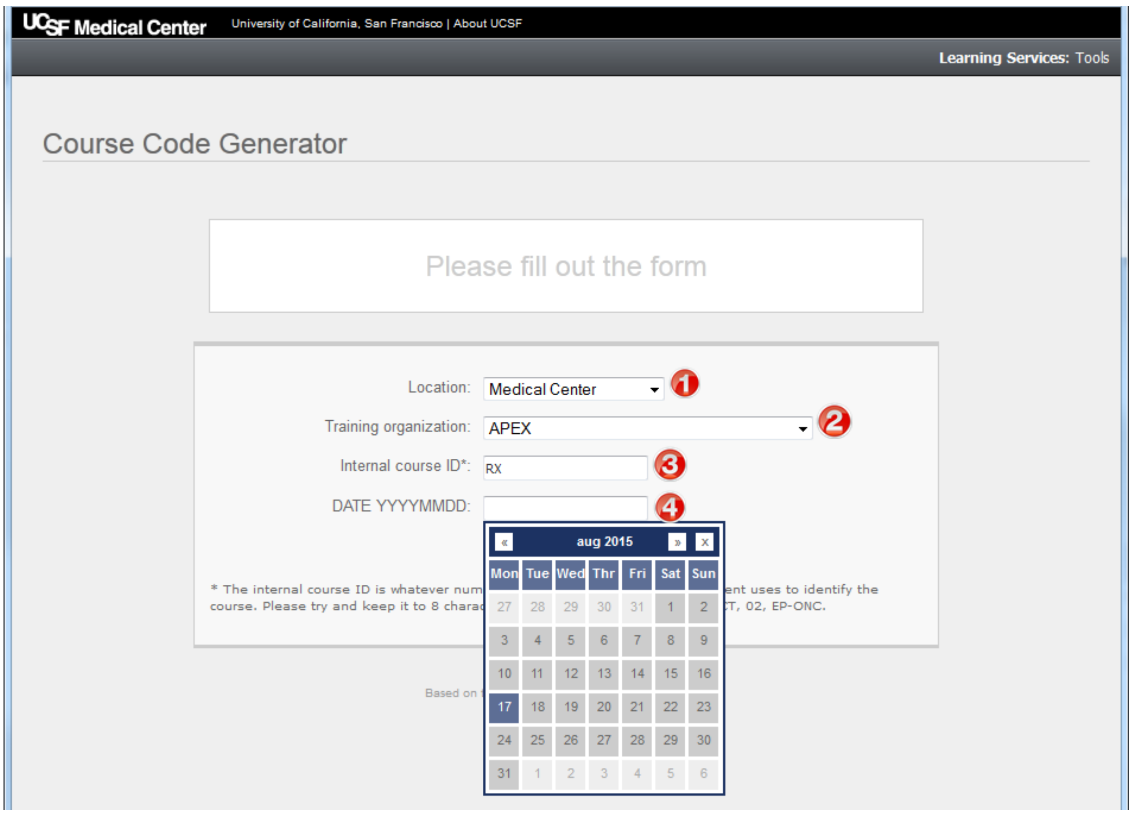
- **Course Code Generator:** http://training.ucsfmedicalcenter.org/tools/course-code-generator.html

To insure consistency for all **APeX** eCourses, you must enter the following information for **EACH** eCourse:

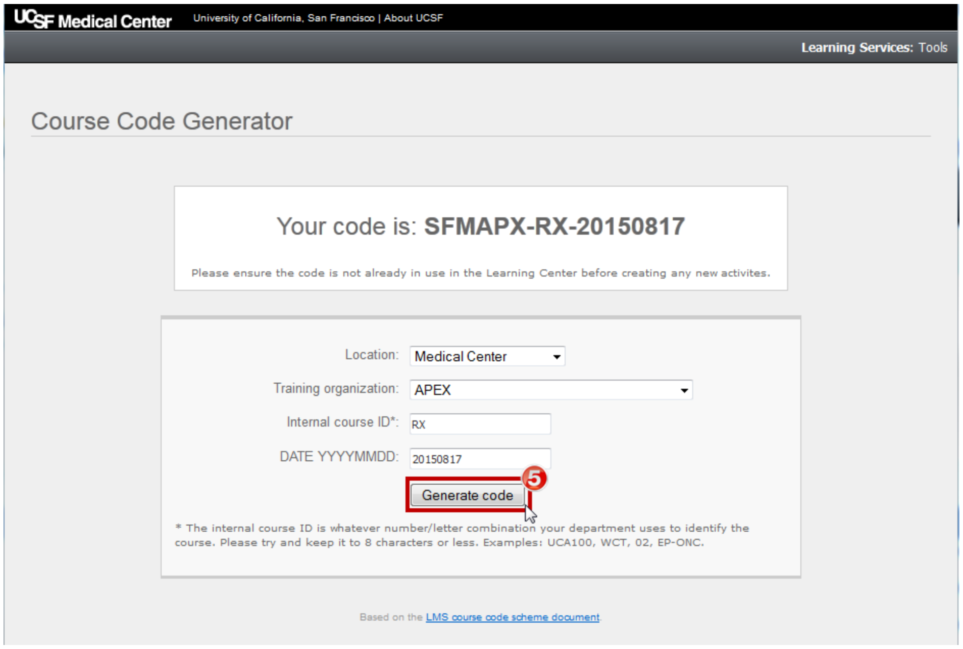
1. Location: **Medical Center.**
2. Training Organization: **APEX.**
3. Internal course ID*: **TYPE** an abbreviation based on the topic of the eCourse.

> Please use consistent naming protocols, and confirm the Internal Course ID syntax with other **APeX** courses in SumTotal.
>
> For example: AMB, ED, RX, etc.

4. **CLICK** the Date Field to **SELECT today's date** from the calendar.

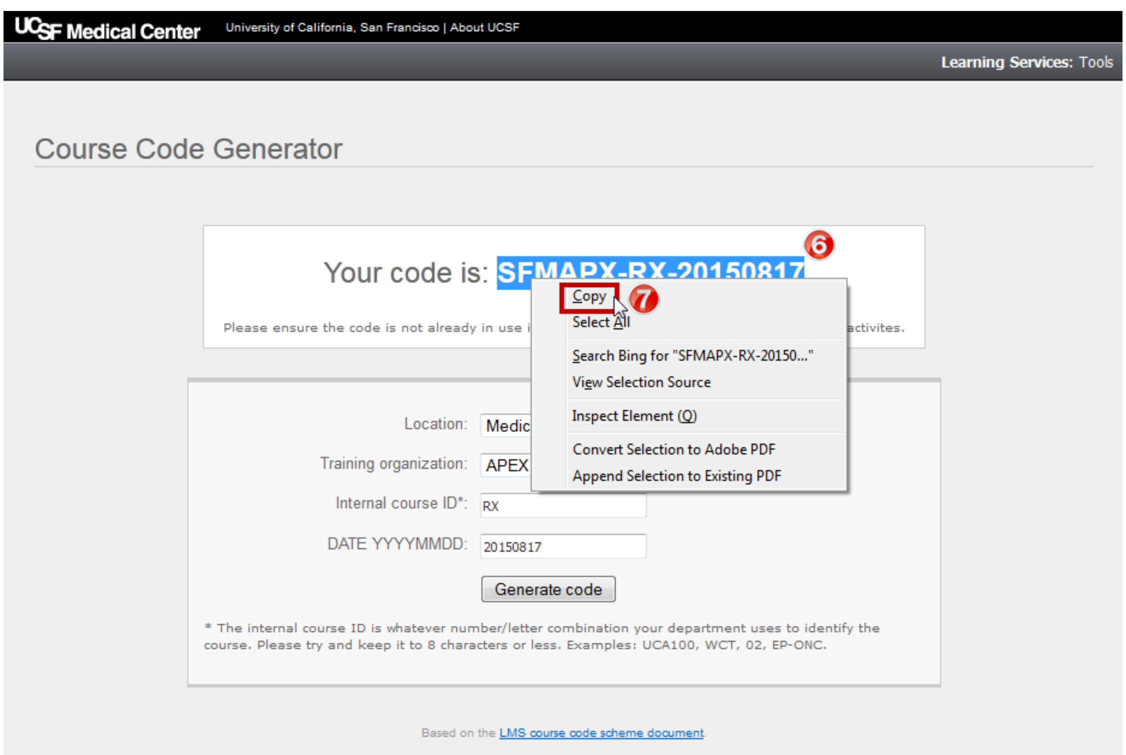


5. **CLICK** the **Generate Code** button.



6. **SELECT** the new **Course Code** number.

7. **RIGHT CLICK** to **COPY** the **Course Code.**

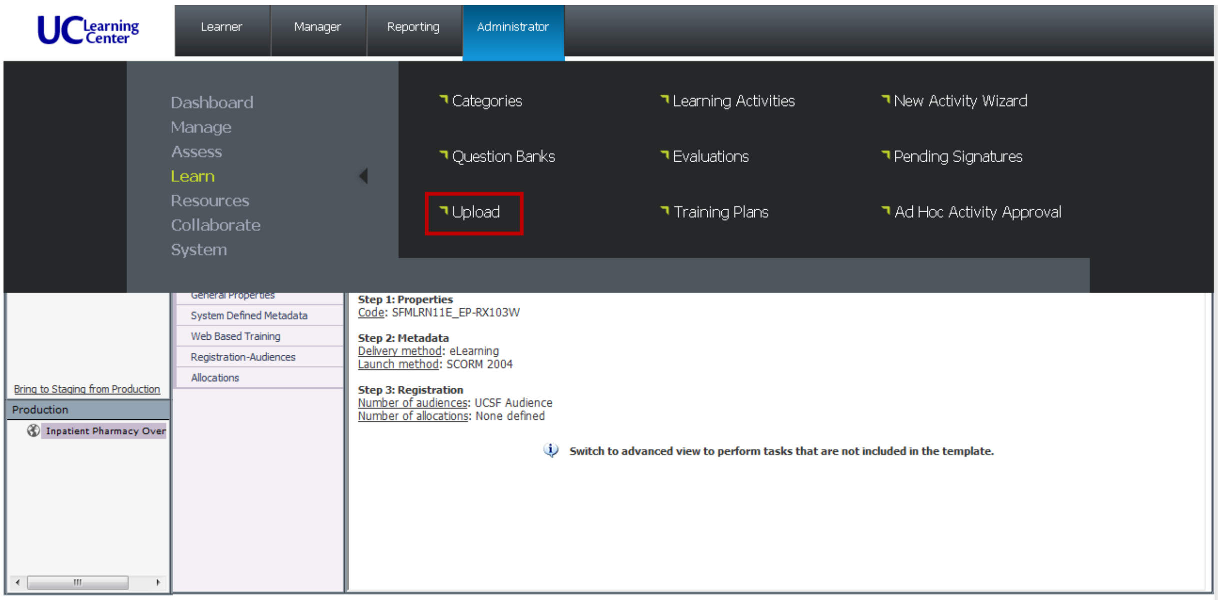


8. **PASTE** the **Course Code** in an email or text document to use later.

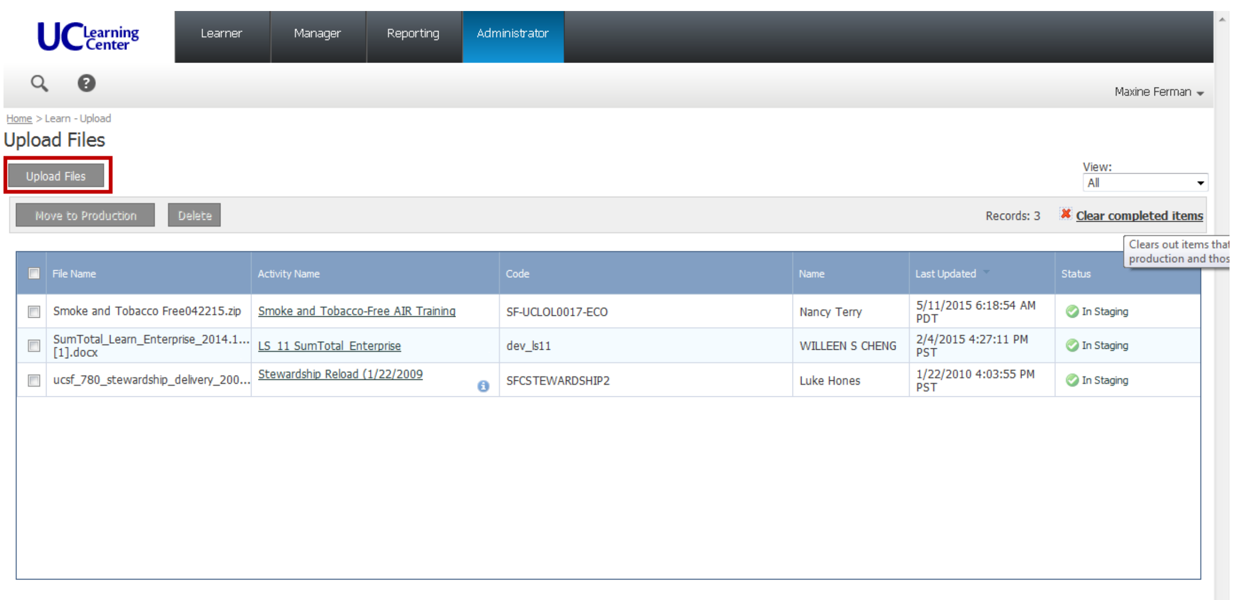
7.2 How to Upload a NEW APeX eCourse in SumTotal

Regardless if you are **REPLACING** an existing eCourse, or adding a **NEW** one, you will need to upload the Captivate published **.zip** file for **EACH** eCourse to SumTotal.

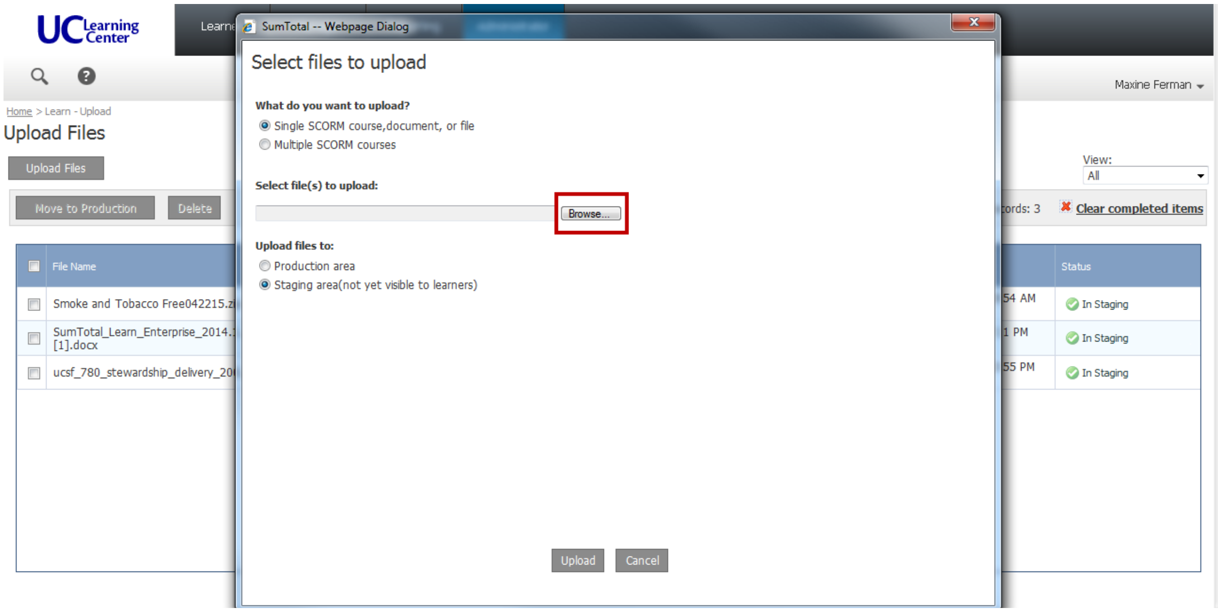
1. Login to SumTotal.
2. **SELECT Administrator > Learn > Upload.**



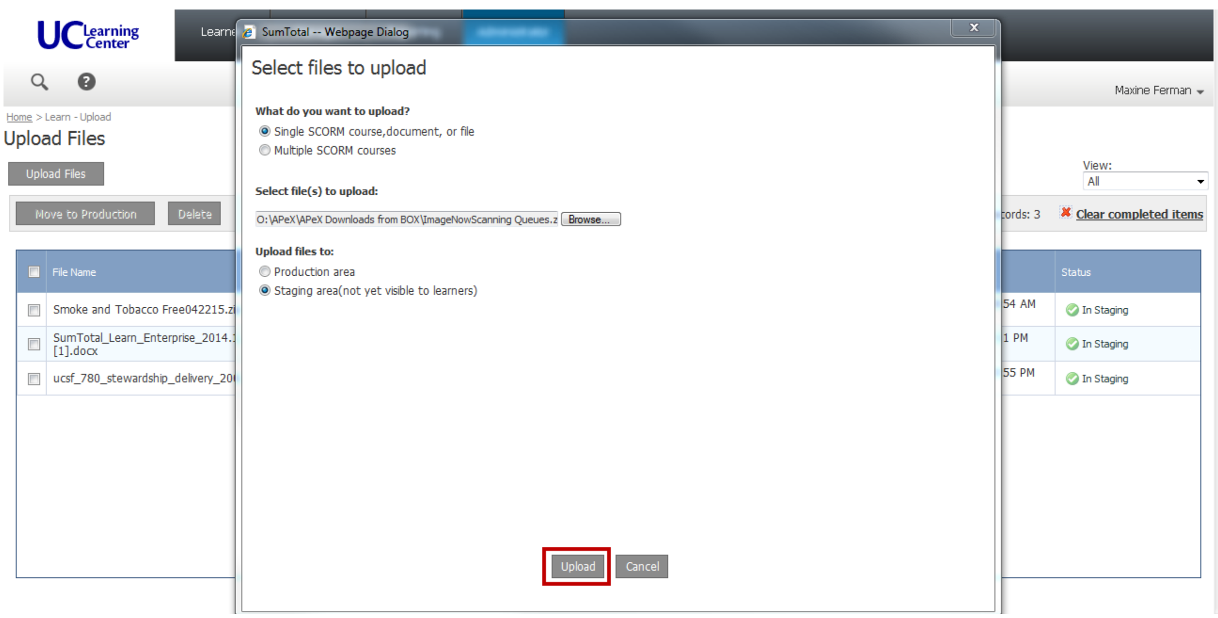
3. **CLICK** the **Upload Files** button.



4. **CLICK** the **Browse** button, and navigate to the **NEW** .zip file that you previously downloaded from the **APeX UCSF BOX** to your computer or network.



5. **CLICK** the **Upload** button



After the file is uploaded, the **Specify file properties** Dialogue Box will automatically open.

7.3 Specify File Properties Settings

1. **TYPE** in the **Activity name** field using this naming protocol:

   APeX Developers Initials - Course Title - ALPHA TEST - month/day/year

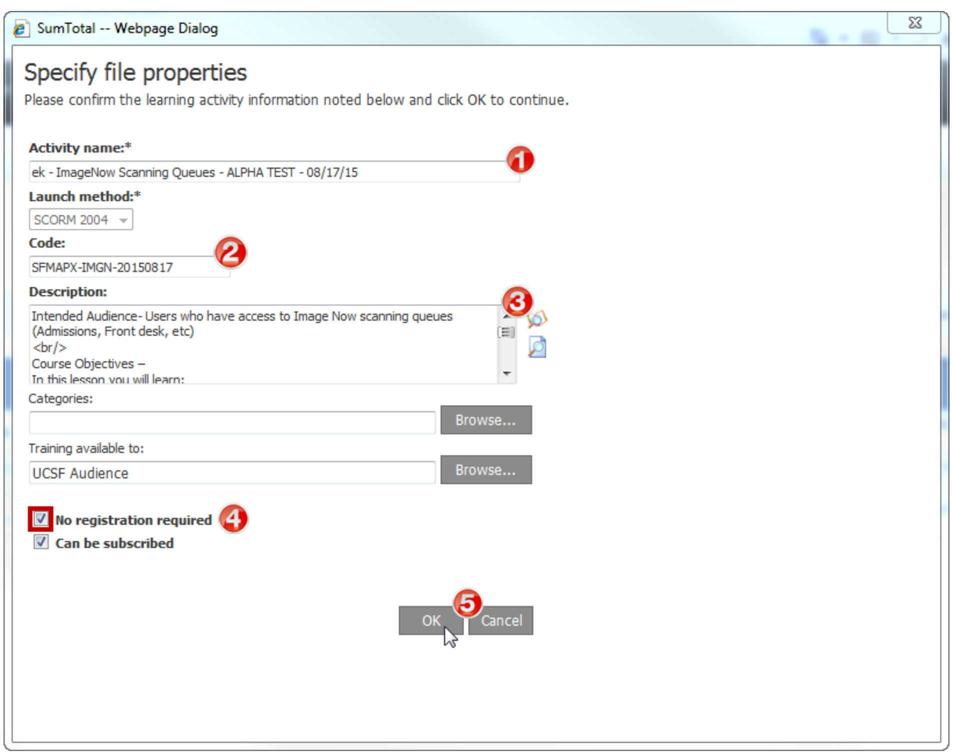
   Naming eCourses consistently, logically and in a predictable way will allow you (and users) to easily search and find each eCourse later for testing.

2. **PASTE** the **NEW Course Code Number**, as previously generated by the Course Code Generator.

3. **PASTE** the **Audience**, **Description** and **Course Length** as provided in the launch initiation EMAIL sent by **APeX Training.**
   a. You many need to add html to format text and bulleted lists.
   b. Include the following tag Line:
      For questions about APeX training, please contact the APeX Provider Training Hotline at (415) 514-8797.
      ©2015 Epic Systems Corporation and UCSF Medical Center. Confidential.
      This material should be stored securely and may not be distributed publicly.

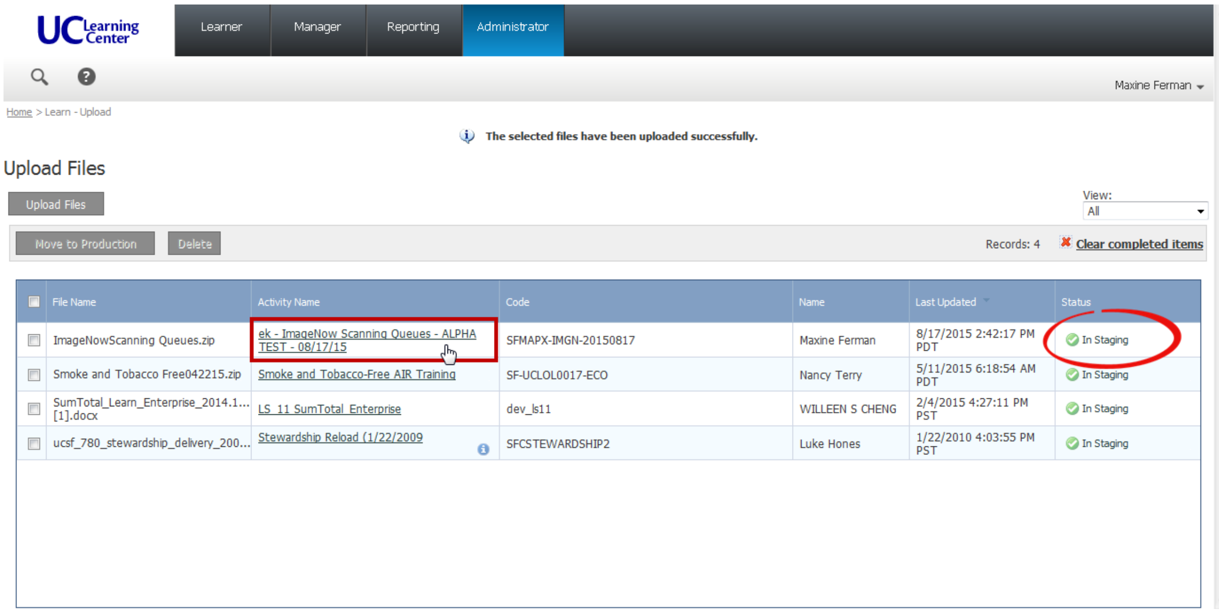
4. **CLICK** the Check Box to activate **No registration required.**

5. **CLICK** the **OK** button.



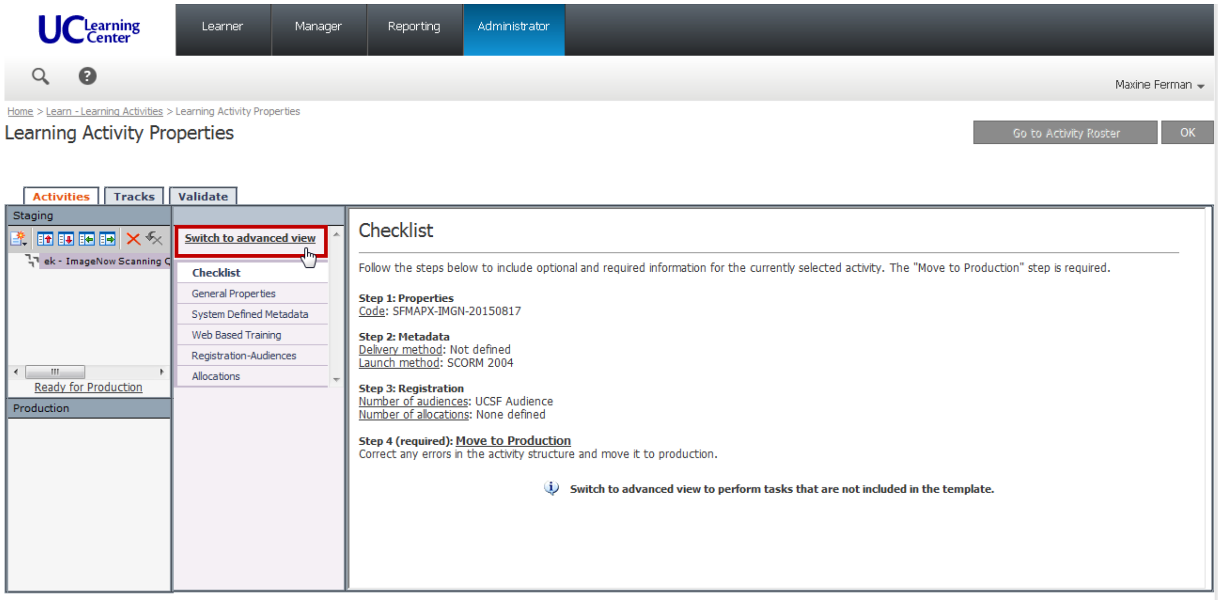
It may take a few minutes to process the file upload.

When the file **Status** changes to "**In Staging**," **CLICK** the **Activity Name** to go to the **Learning Activity Properties** section.



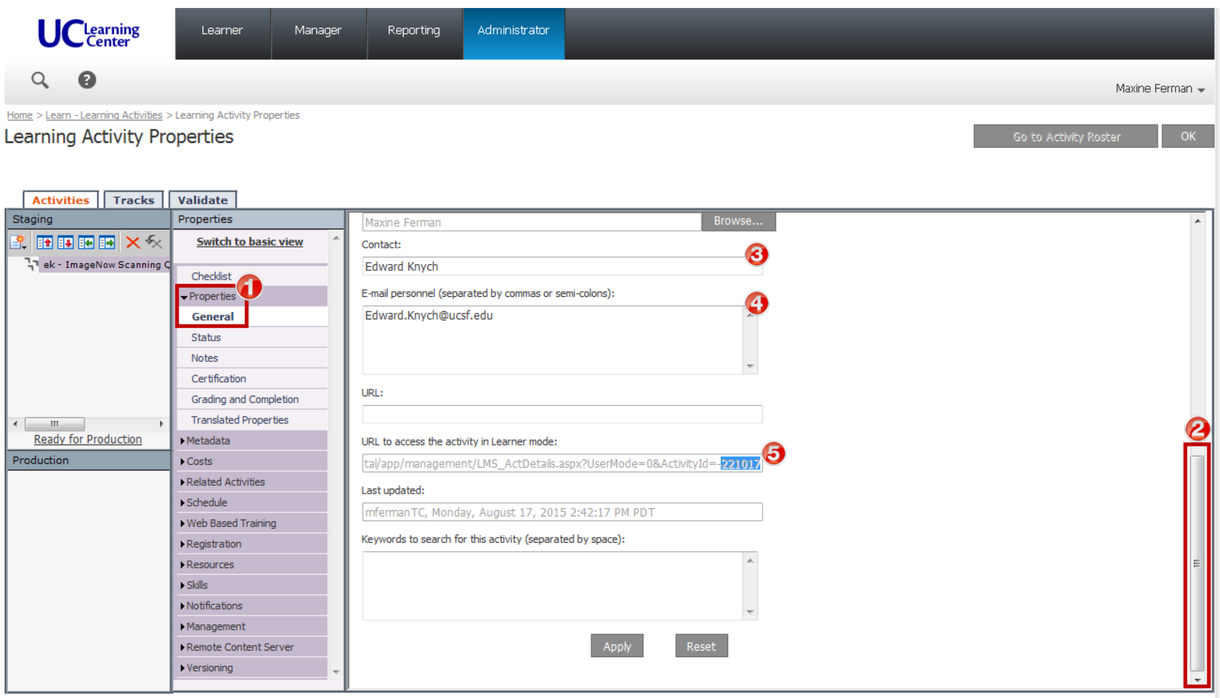
7.4 Learning Activity Properties Settings

1. **CLICK Switch to Advanced View** to access all necessary settings.



7.4.1 Properties Section

1. **CLICK Properties > General** to access these settings.
2. Confirm all data previously entered, and **SCROLL** down to access more fields.
3. **TYPE** the **APeX Contact** name.
4. **TYPE** the **APeX Contact E-mail** address.
5. **SELECT** the last 6 digits of the **URL to access the activity in Learner Mode.**
6. **COPY (Ctrl + C)** the **SELECTED** text and paste in an email for later.



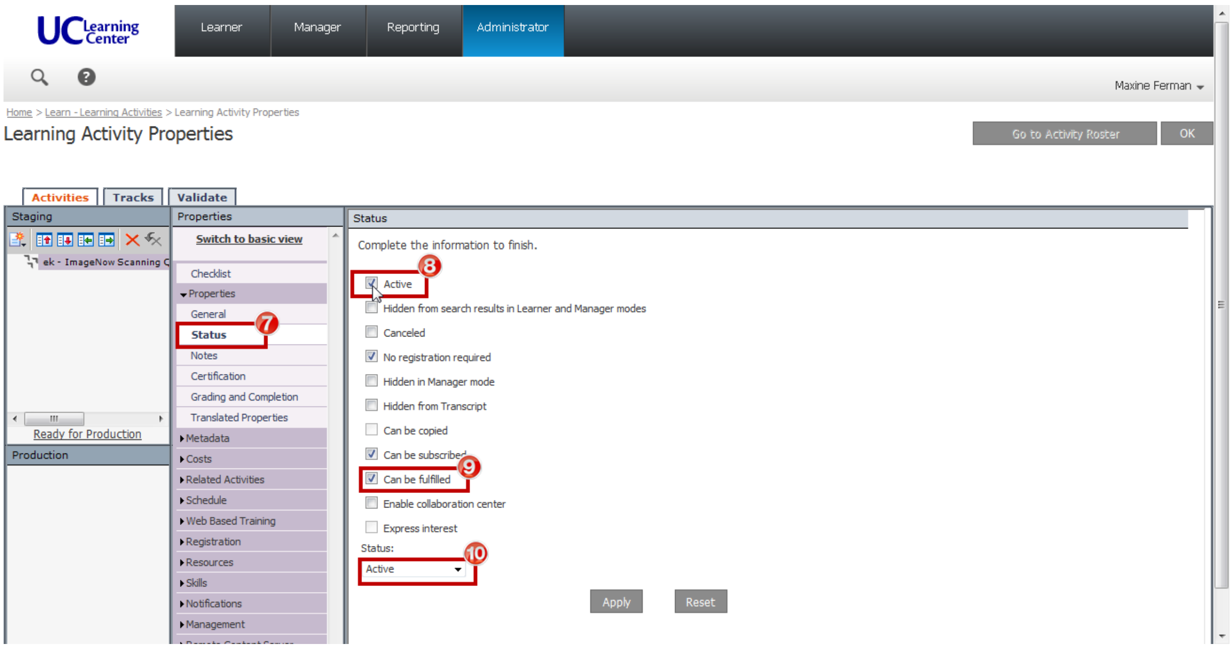
7. **CLICK Status**

8. **CHECK** the **Active** checkbox.

   No registration Required and **Can Be Subscribed** are already **CHECKED** by default.

9. **CHECK** the **Can be fulfilled** checkbox.

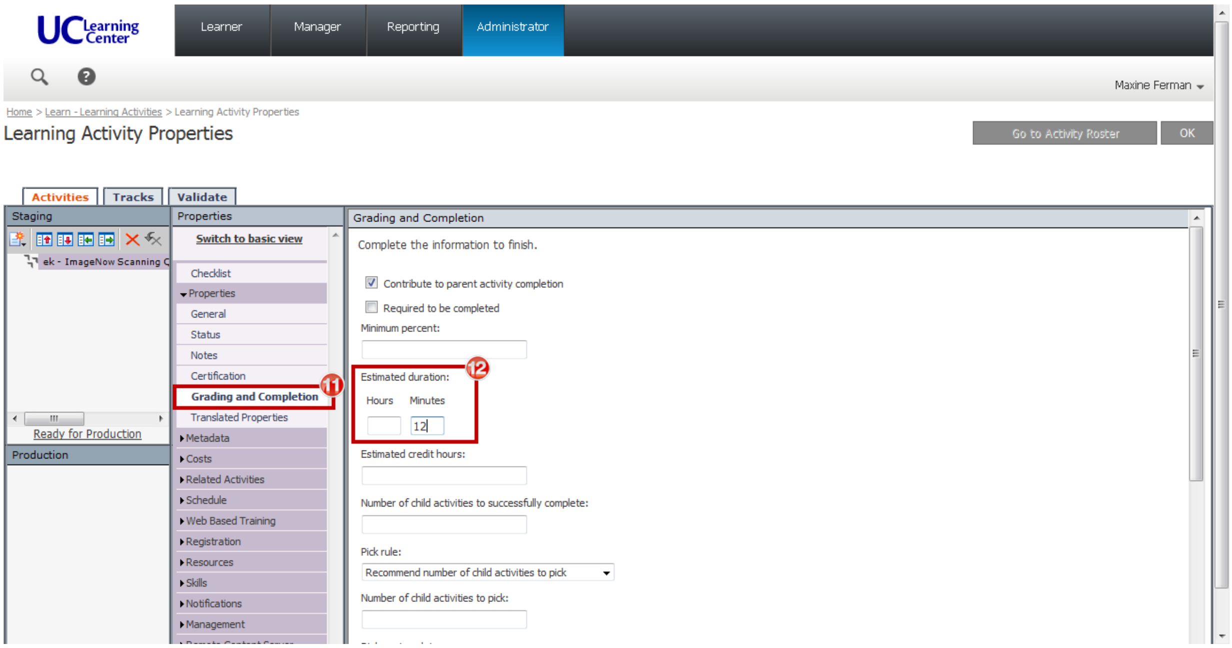
10. Change **Status** from None to **Active.**



11. CLICK Grading and Completion.

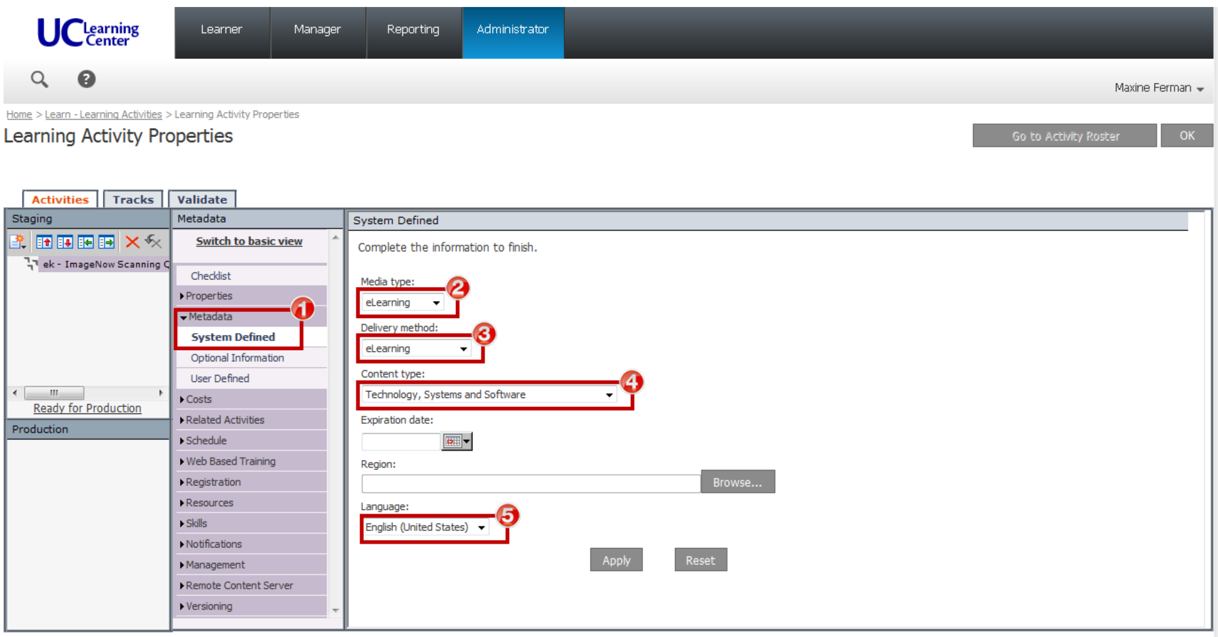
12. TYPE Estimated Duration to include **Hours** and **Minutes** as provided in the launch initiation EMAIL sent by **APeX Training.**

- All other required settings are **CHECKED** by default.



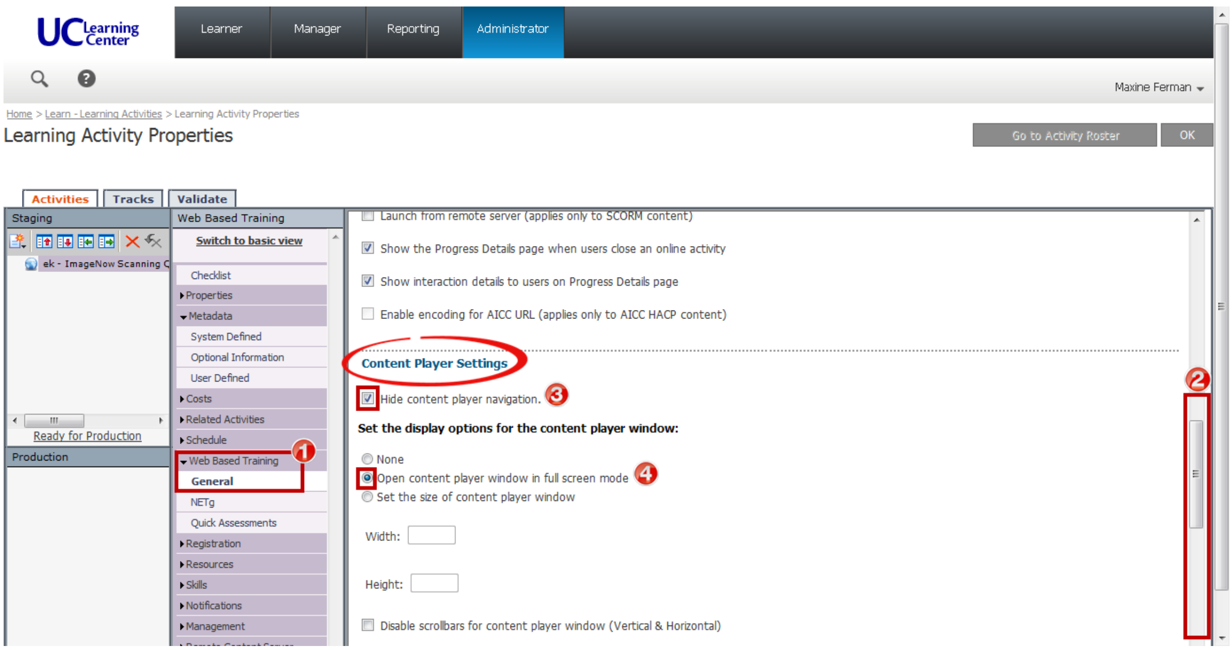
7.4.2 Meta Data Section

1. **CLICK Metadata > System Defined** to access these settings.
2. **SELECT** Media type: **eLearning.**
3. **SELECT** Delivery method: **eLearning.**
4. **SELECT** Content type: **Technology, Systems and Software.**
5. **SELECT** Language: **English (United States).**



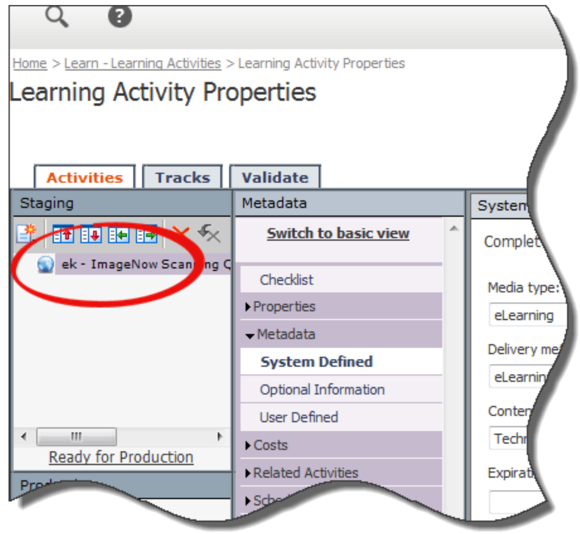
7.4.3 Web Based Training Section

1. **CLICK Web Based Training > General** to access these settings.
2. **SCROLL** down to the Content Player Settings section.
3. **CHECK** the **Hide content player navigation** checkbox
4. **CLICK** the **Radio Button** to **Open content player window in full screen mode**
   a. All other required settings are **CHECKED** by default.



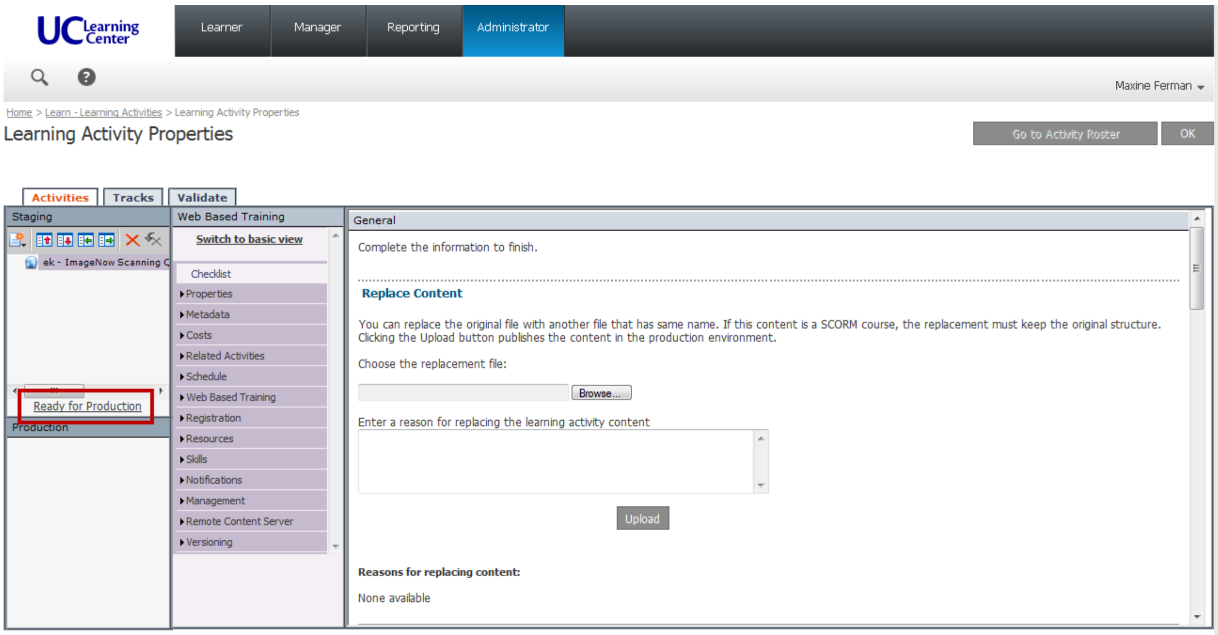
⚠ Confirm that settings have been made correctly in all sections.

Notice the icon has changed to eLearning in the Staging area.

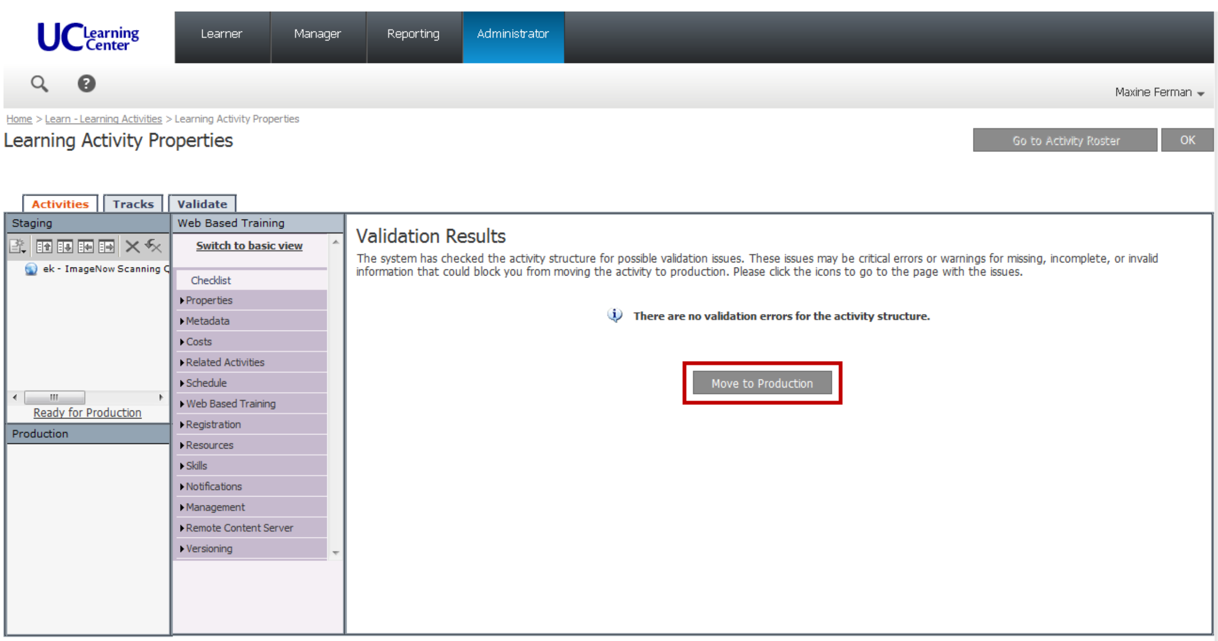


7.4.4 Move eCourse into Production

1. CLICK Ready for Production.



2. CLICK the **Move to Production** button.



8
Learning Services

8. ALPHA Test Protocol

8.1 ALPHA Test eCourse in Windows 7 using IE8 as a Learner

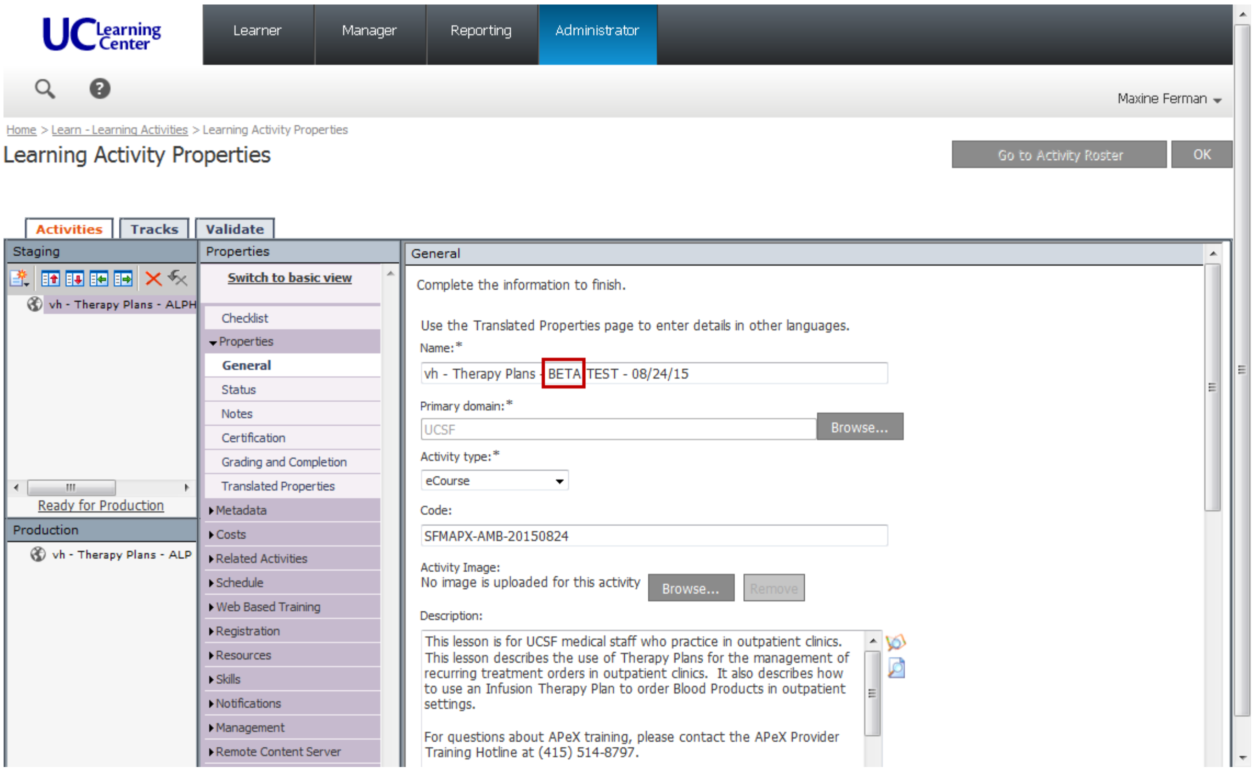
Please test in Windows/IE8, and confirm the following criteria for EACH **NEW** and **REPLACEMENT** eCourse:

- ❑ eCourse **Completes** successfully.
  - o If a **Quiz** is included, use the **Answer Key** as provided in the launch initiation EMAIL sent by **APeX Training.**
- ❑ eCourse **Bookmarks** successfully.
  - o Exit out of eCourse before it is completed.
  - o Relaunch to insure eCourse begins where you left off.
- ❑ If Audio/Video is included, confirm **Closed Captioning** is in sync.

If eCourse **DOES NOT PASS** the **ALPHA Test**, please include any specific information in the **BETA Test** email to the **APeX Training** contact.

When the **ALPHA Test** is complete, go back to the **Learning Activity Properties** and change the name of the eCourse to include **BETA TEST**.

This is just good housekeeping practice and helps to track that **Learning Services** has completed the **ALPHA Test**.



8.2 Notify the APeX Training contact to BETA Test eCourse in SumTotal

✉ Please send an **EMAIL TO** the **APeX Training** contacts and **CC**: natalie.haas@ucsf.edu for **EACH .zip** file, and include the following information:

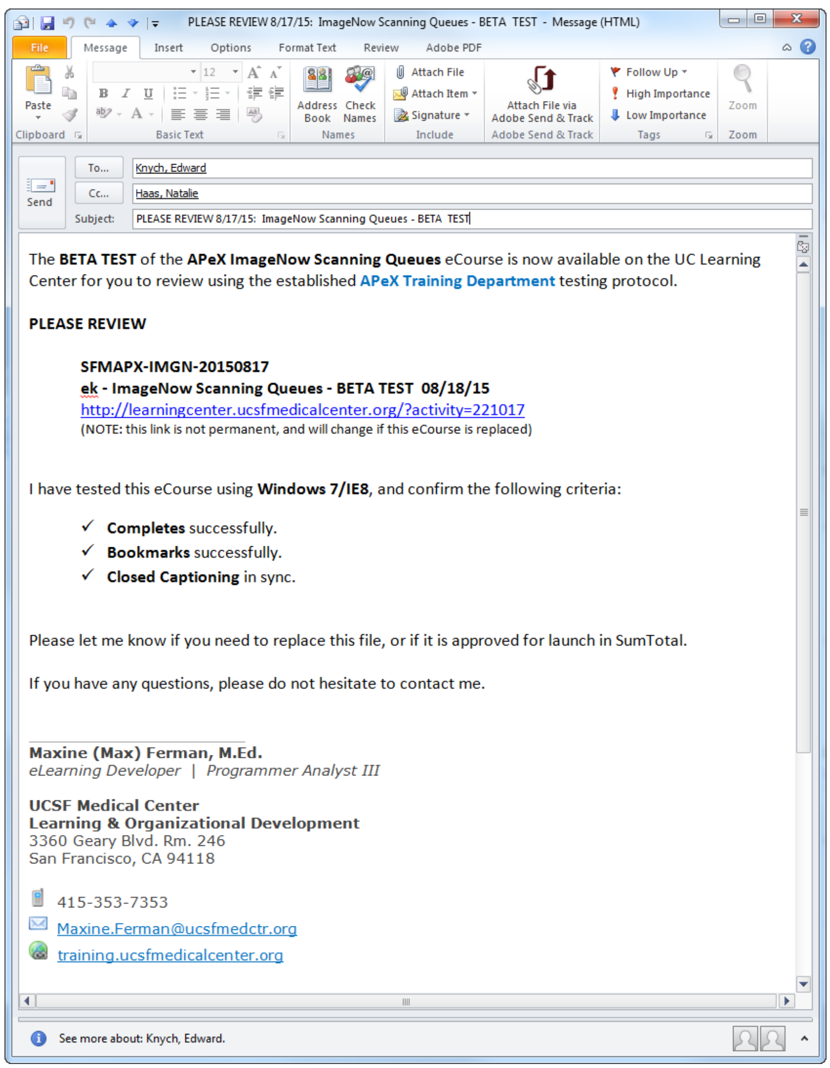
- ❑ **Course Code**

- ❑ **BETA TEST** name
  (i.e. ek - ImageNow Scanning Queues - BETA TEST 08/18/15)

- ❑ **Activity Link**
  (i.e. http://learningcenter.ucsfmedicalcenter.org/?activity=221017)

⚠ Test Activity Link BEFORE sending email to **APeX Training.**

Example:



The **BETA TEST** of the **APeX ImageNow Scanning Queues** eCourse is now available on the UC Learning Center for you to review using the established **APeX Training Department** testing protocol.

PLEASE REVIEW

SFMAPX-IMGN-20150817
ek - ImageNow Scanning Queues - BETA TEST 08/18/15
http://learningcenter.ucsfmedicalcenter.org/?activity=221017
(NOTE: this link is not permanent, and will change if this eCourse is replaced)

I have tested this eCourse using **Windows 7/IE8**, and confirm the following criteria:

- ✓ **Completes** successfully.
- ✓ **Bookmarks** successfully.
- ✓ **Closed Captioning** in sync.

Please let me know if you need to replace this file, or if it is approved for launch in SumTotal.

If you have any questions, please do not hesitate to contact me.

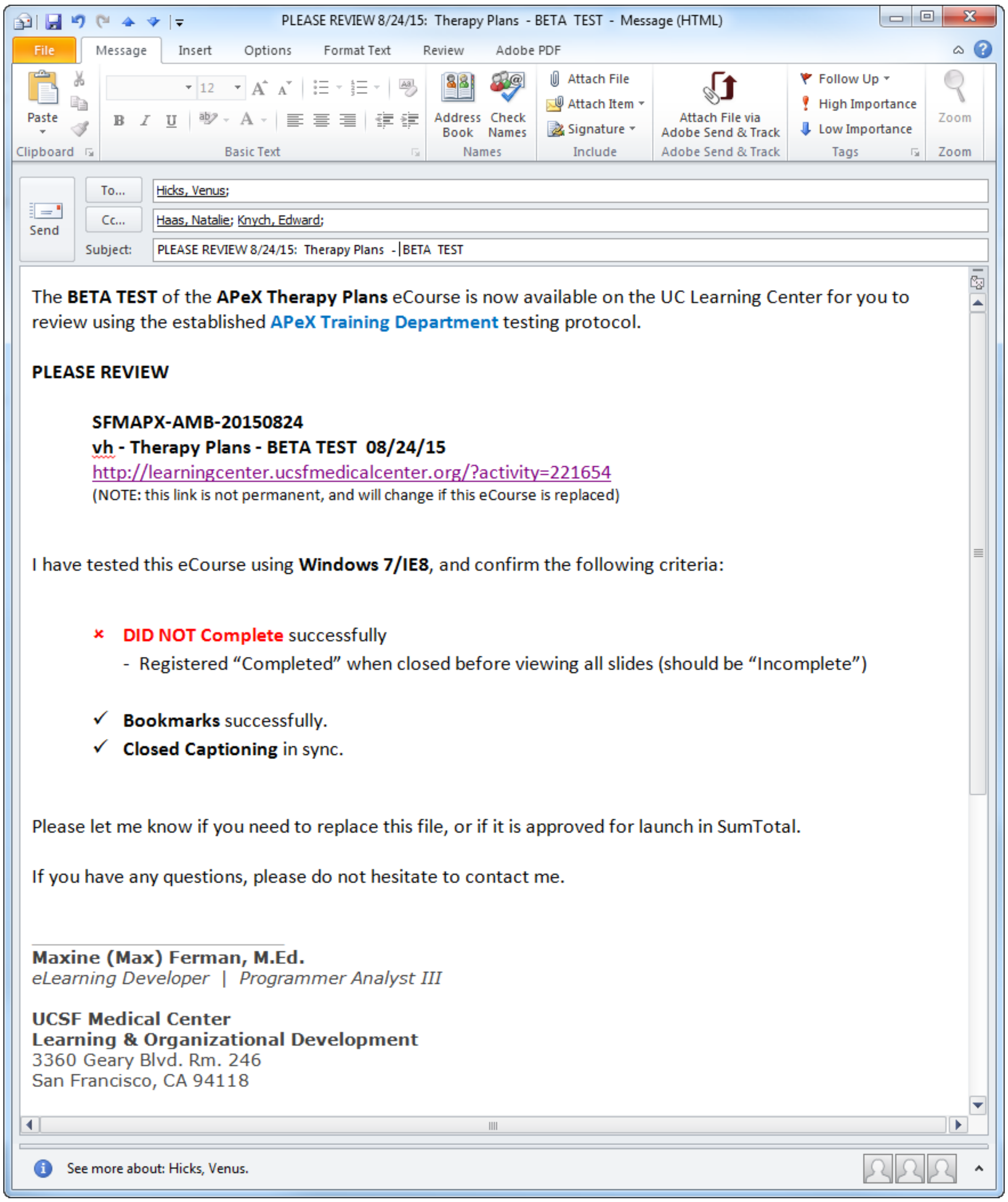
Maxine (Max) Ferman, M.Ed.
eLearning Developer | Programmer Analyst III

UCSF Medical Center
Learning & Organizational Development
3360 Geary Blvd. Rm. 246
San Francisco, CA 94118

415-353-7353
Maxine.Ferman@ucsfmedctr.org
training.ucsfmedicalcenter.org

If eCourse **DID NOT PASS** the **ALPHA Test**, please include any specific information in the **BETA Test** email to the **APeX Training** contact.

Example:



PLEASE REVIEW 8/24/15: Therapy Plans - BETA TEST - Message (HTML)

To... Hicks, Venus;

Cc... Haas, Natalie; Knych, Edward;

Subject: PLEASE REVIEW 8/24/15: Therapy Plans - BETA TEST

The **BETA TEST** of the **APeX Therapy Plans** eCourse is now available on the UC Learning Center for you to review using the established **APeX Training Department** testing protocol.

PLEASE REVIEW

SFMAPX-AMB-20150824
vh - Therapy Plans - BETA TEST 08/24/15
http://learningcenter.ucsfmedicalcenter.org/?activity=221654
(NOTE: this link is not permanent, and will change if this eCourse is replaced)

I have tested this eCourse using **Windows 7/IE8**, and confirm the following criteria:

- × **DID NOT Complete** successfully
  - Registered "Completed" when closed before viewing all slides (should be "Incomplete")
- ✓ **Bookmarks** successfully.
- ✓ **Closed Captioning** in sync.

Please let me know if you need to replace this file, or if it is approved for launch in SumTotal.

If you have any questions, please do not hesitate to contact me.

Maxine (Max) Ferman, M.Ed.
eLearning Developer | Programmer Analyst III

UCSF Medical Center
Learning & Organizational Development
3360 Geary Blvd. Rm. 246
San Francisco, CA 94118

See more about: Hicks, Venus.

9
APeX Training

9. BETA Test Protocol

Once you have received the **BETA TEST** email from **Learning Services**, you may begin testing each eCourse in SumTotal.

APeX Training has established specific criteria and benchmarks required to test all **NEW** and **REPLACEMENT APeX** eCourses in SumTotal.

Please notify Learning Services if the eCourse is either Not Approved or Approved for Launch in SumTotal

---

See Appendix 4

Document:	**e-Learning Testing Instructions**
Received:	8/17/15
FROM:	Edward.Knych@ucsf.edu - **APeX Training**

10
APeX Training

10. eCourse Approval

Decision Point

🖂 Please send an **EMAIL TO** **Learning Services** contact and **CC**: natalie.haas@ucsf.edu stating that the **BETA TEST** is either **not approved**, or **approved** for launch in SumTotal.

10.1 Not Approved

If the **BETA TEST** is **not approved** by the **APeX Training** contact, please follow these steps:

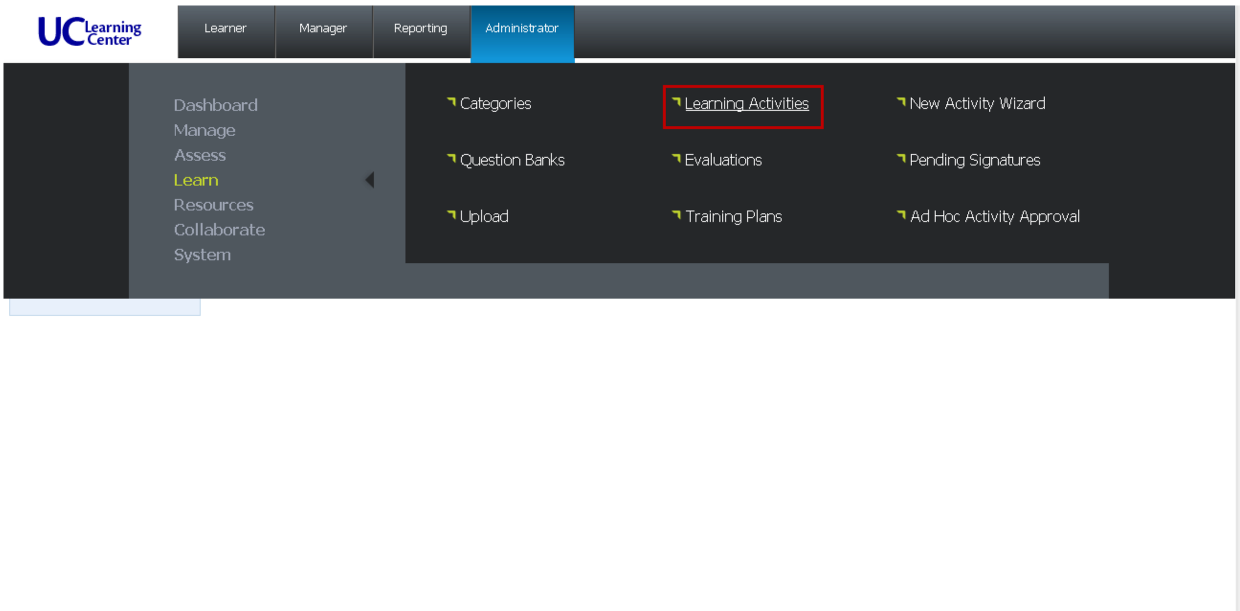
1. The **APeX Training** contact must make the necessary changes and corrections to the working .cptx file.
2. **APeX Training** must repeat **Steps 2, 3 and 4** to begin the process again.

10.1.2 How to DELETE an eCourse in SumTotal

If **APeX Training** did **not approve** the **ALPHA Test**, **Learning Services** must **DELETE** the existing **BETA Test** in SumTotal.

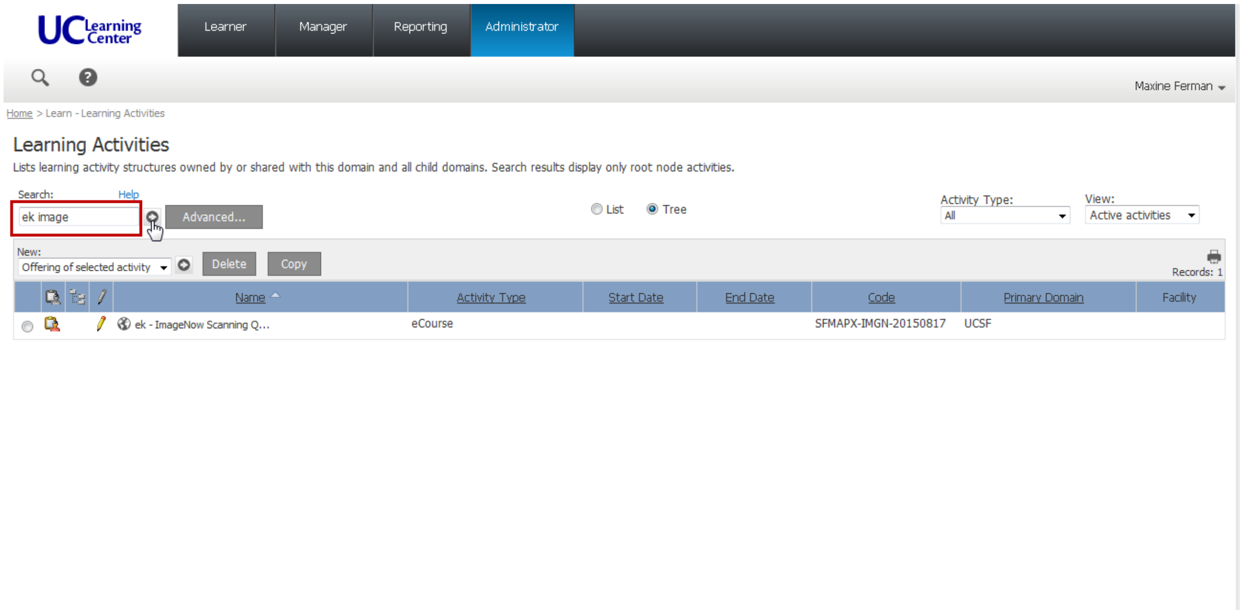
1. Login to SumTotal.

2. **SELECT Administrator > Learn > Learning Activities.**



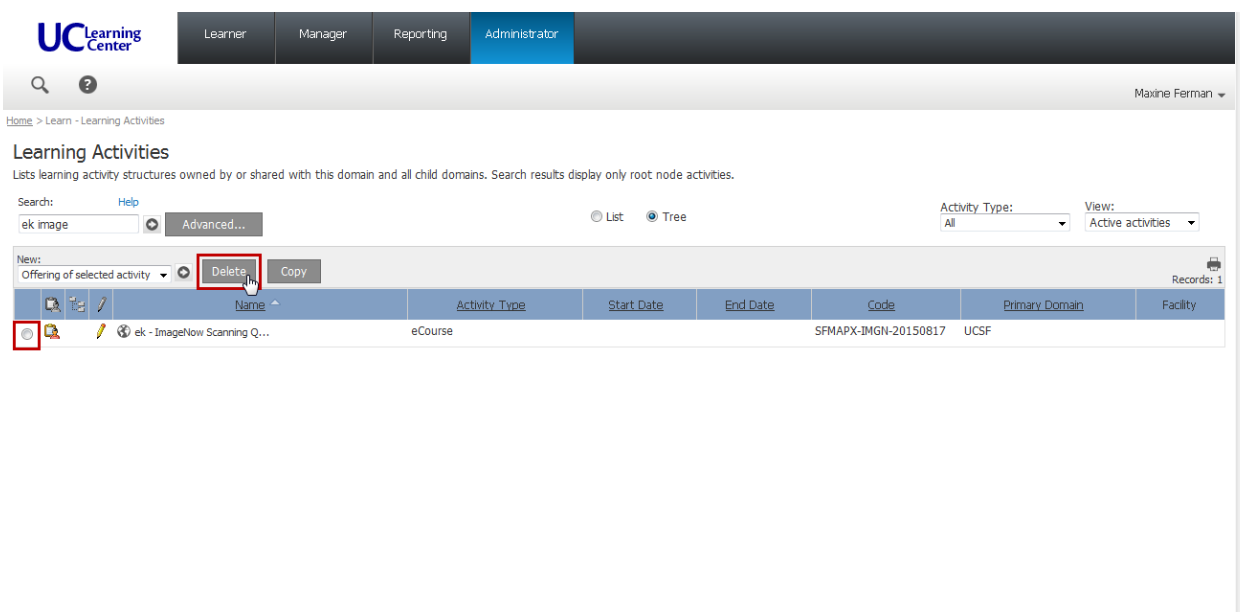
3. **TYPE** the **BETA TEST** name in the SEARCH field.
   (i.e. ek – ImageNow)

4. **CLICK** the **GO** button.
   The eCourse should appear.



5. **CLICK** the **RADIO** button next to the eCourse name.

6. **CLICK** the **DELETE** button.

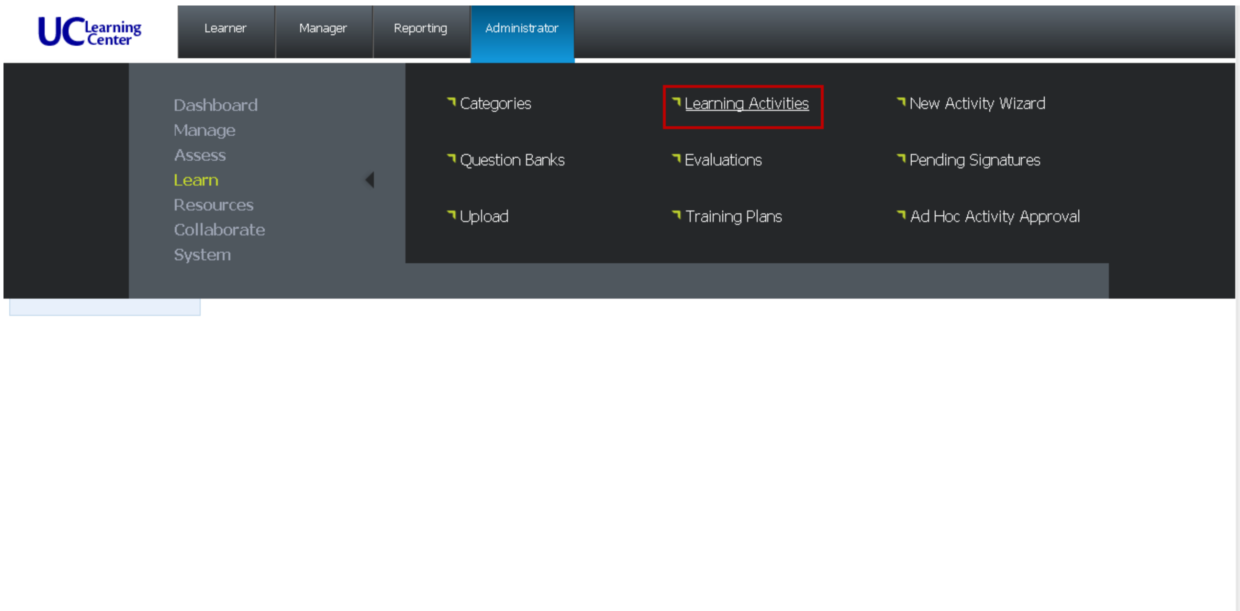


10.2 Approved

If the **BETA Test** is **approved** by the **APeX Training** contact, **Learning Services** must make a few changes to the eCourse in SumTotal to prepare it for **LAUNCH**.

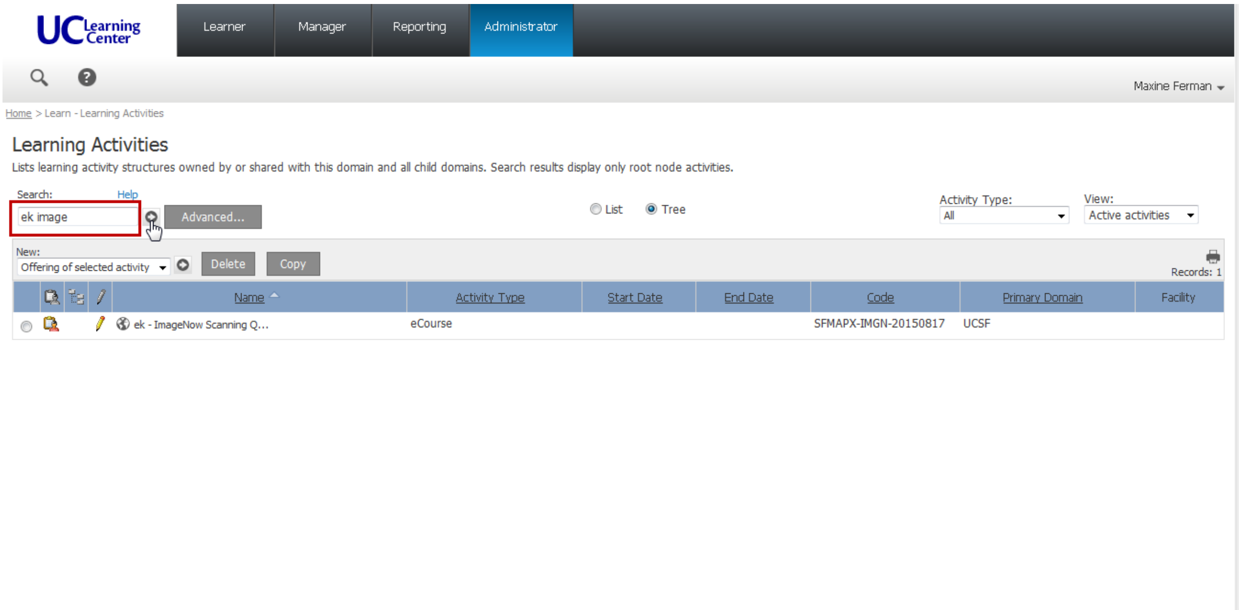
1. Login to SumTotal.

2. **SELECT Administrator > Learn > Learning Activities.**

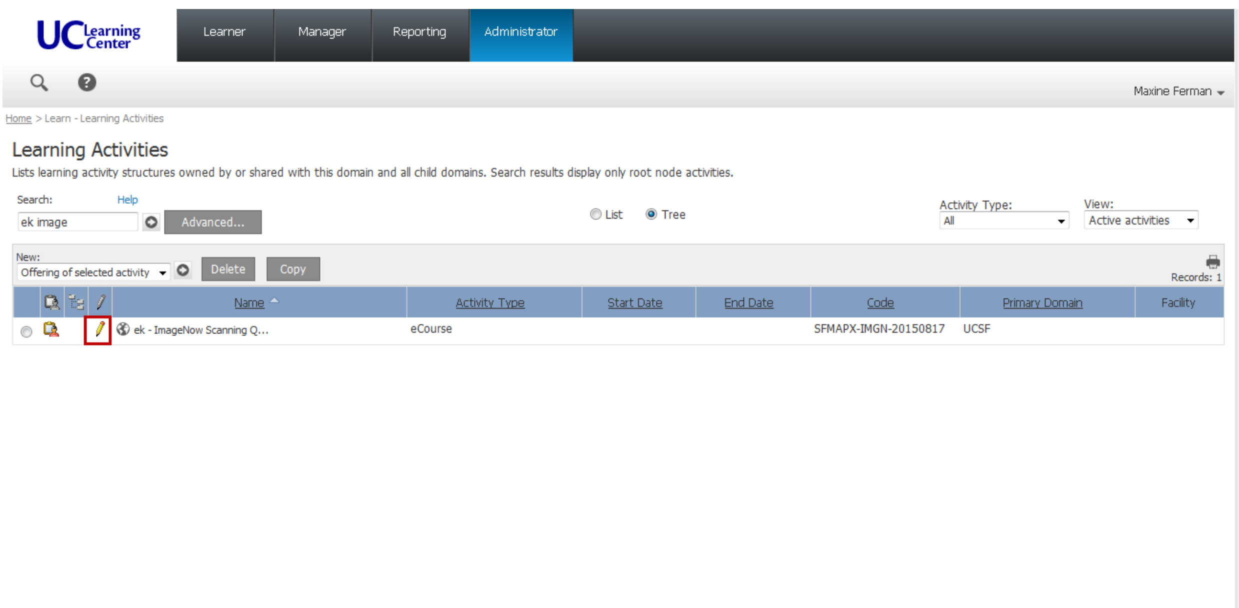


3. **TYPE** the **BETA TEST** name in the **Search** field.
   (i.e. ek – ImageNow)

4. **CLICK** the **GO** button (right arrow).
   The eCourse should appear.

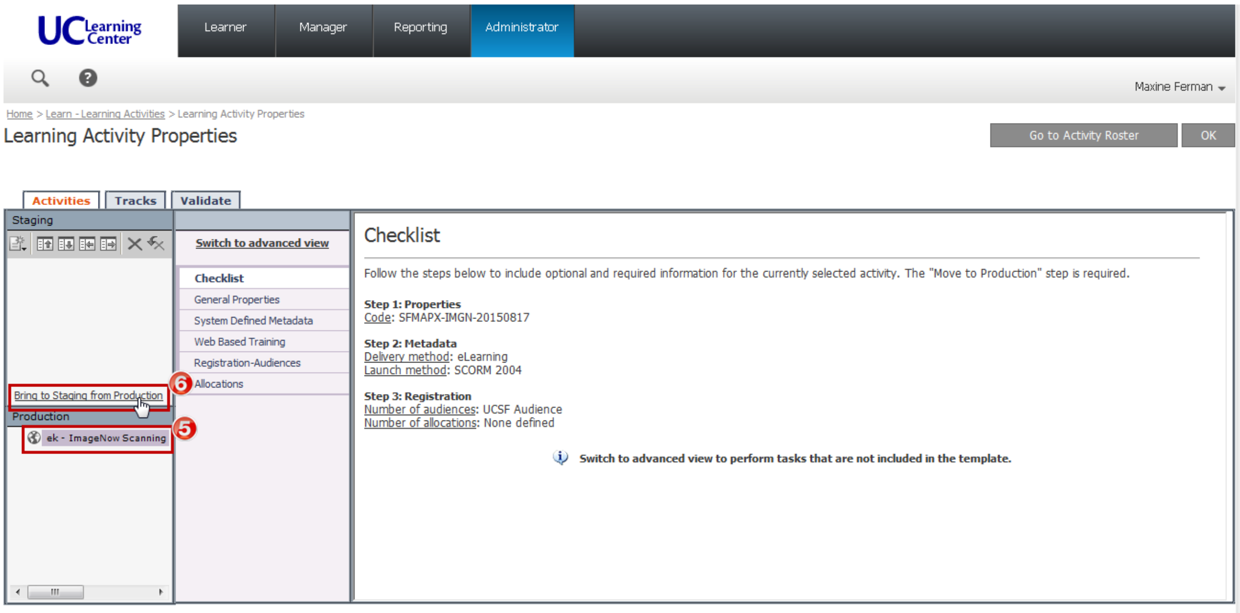


5. **CLICK** the **EDIT** icon (pencil) next to the eCourse name to go to the **Learning Activity Properties** section.



5. **CLICK** the eCourse listed in the Production area.

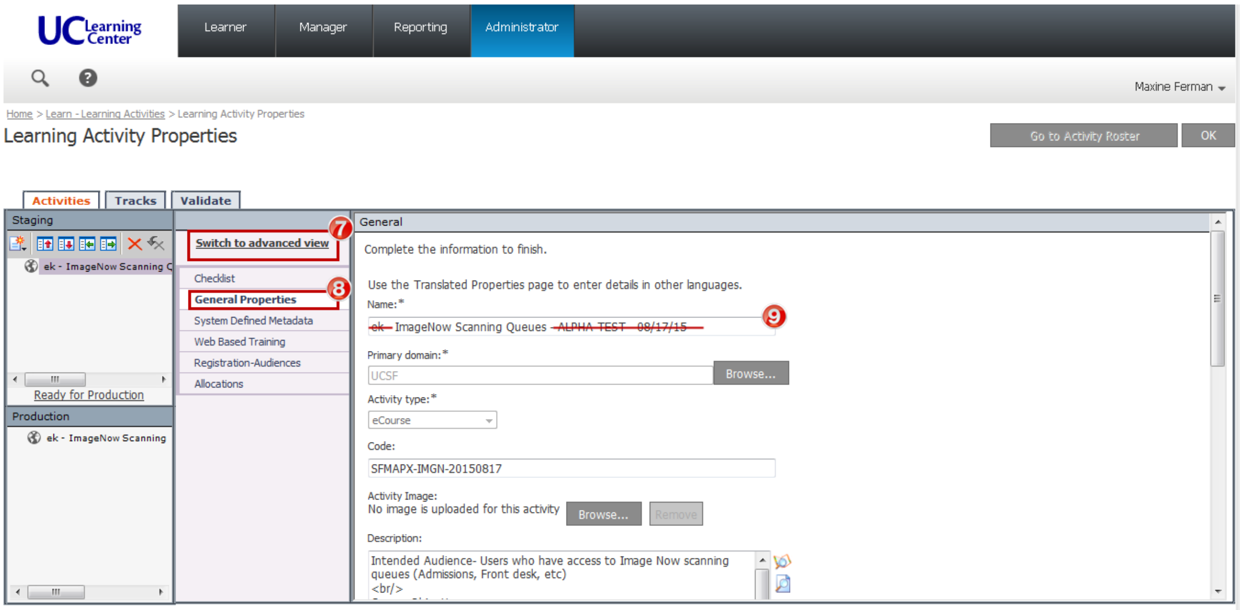
6. **CLICK Bring to Staging from Production.**



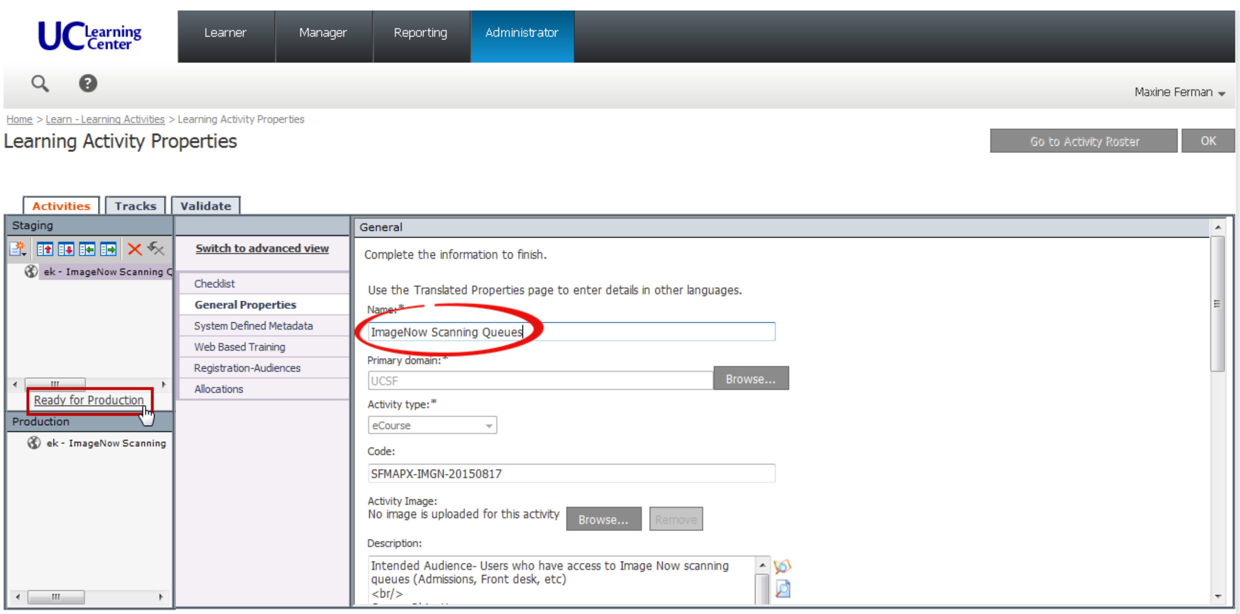
7. **CLICK Switch to advanced view.**

8. **CLICK General Properties.**

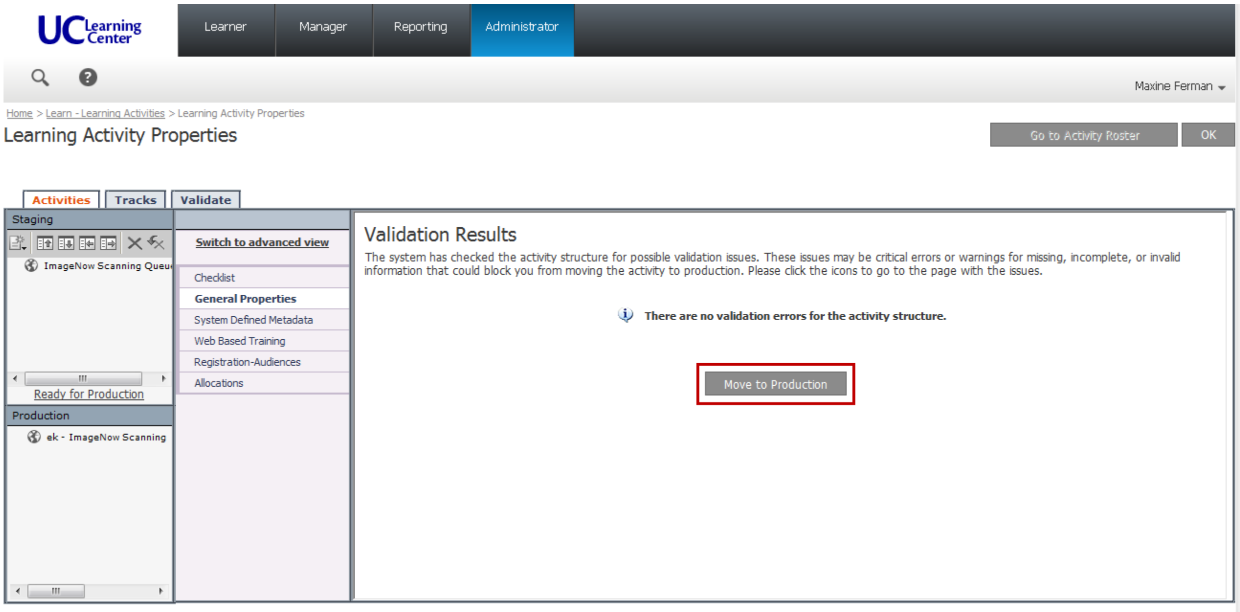
9. **EDIT** the Name field.
   Delete the BETA TEST information, and leave only the Course Title.
   (i.e ~~APeX Developers Initials -~~ Course Title ~~- BETA TEST - month/day/year)~~



10. **CLICK Ready for Production**.



11. CLICK the **Move to Production** button.



⚠ If eCourse is to **REPLACE** an existing **APeX** eCourse, please see next section.

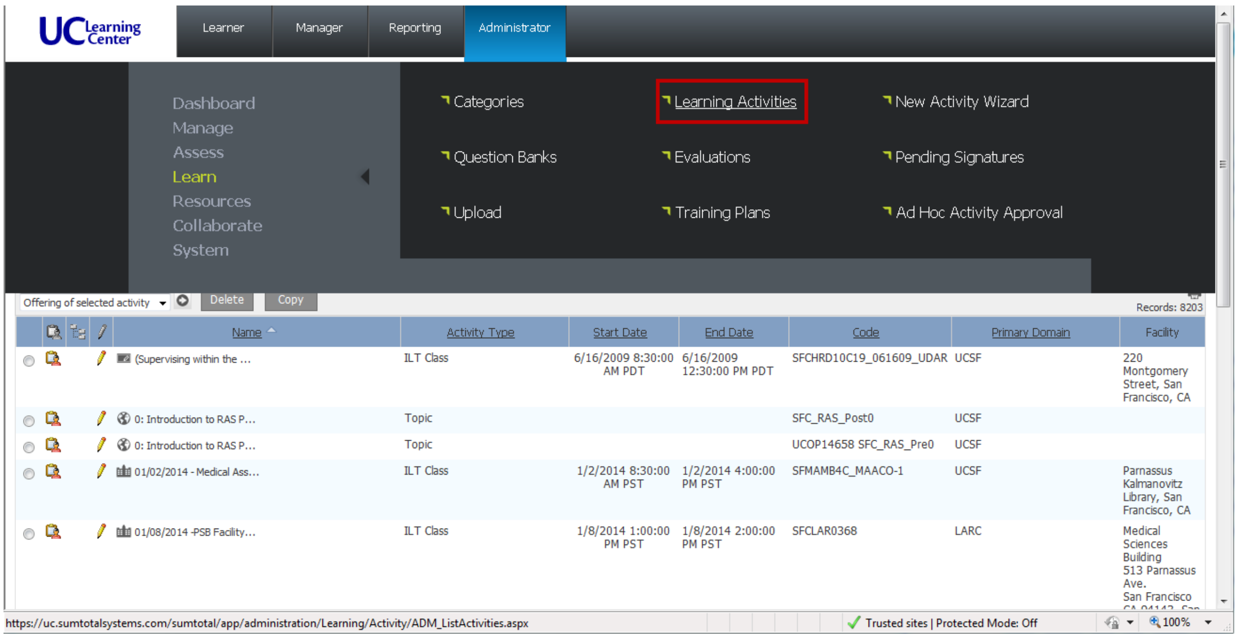
11
Learning Services

11. How to Deactivate an Existing eCourse in SumTotal

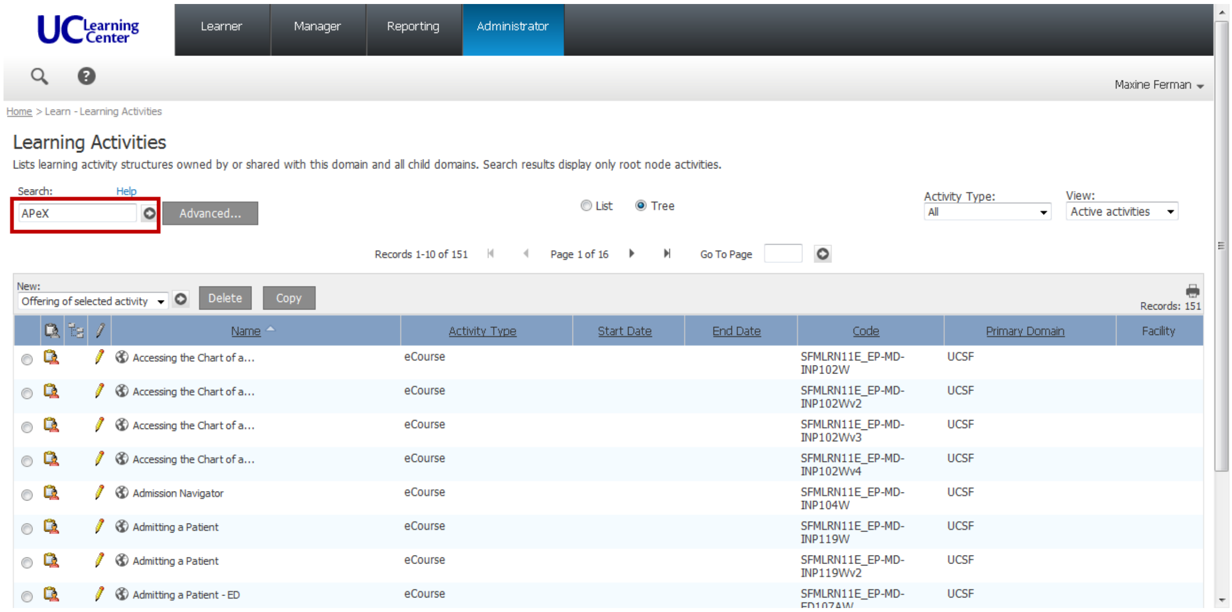
(optional)

If **APeX** is **REPLACING** an eCourse in SumTotal, you MUST **deactivate** the existing eCourse.

1. Login to SumTotal.
2. **SELECT Administrator > Learn > Learning Activates.**

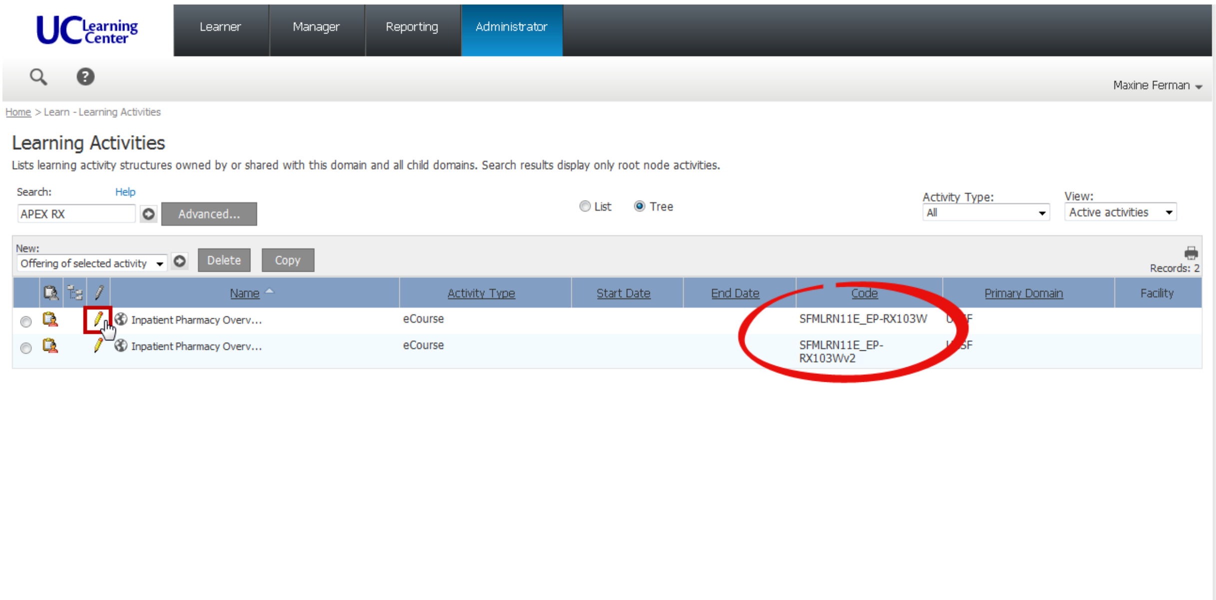


3. **SEARCH** for the eCourse name as provided by **APeX Training**.



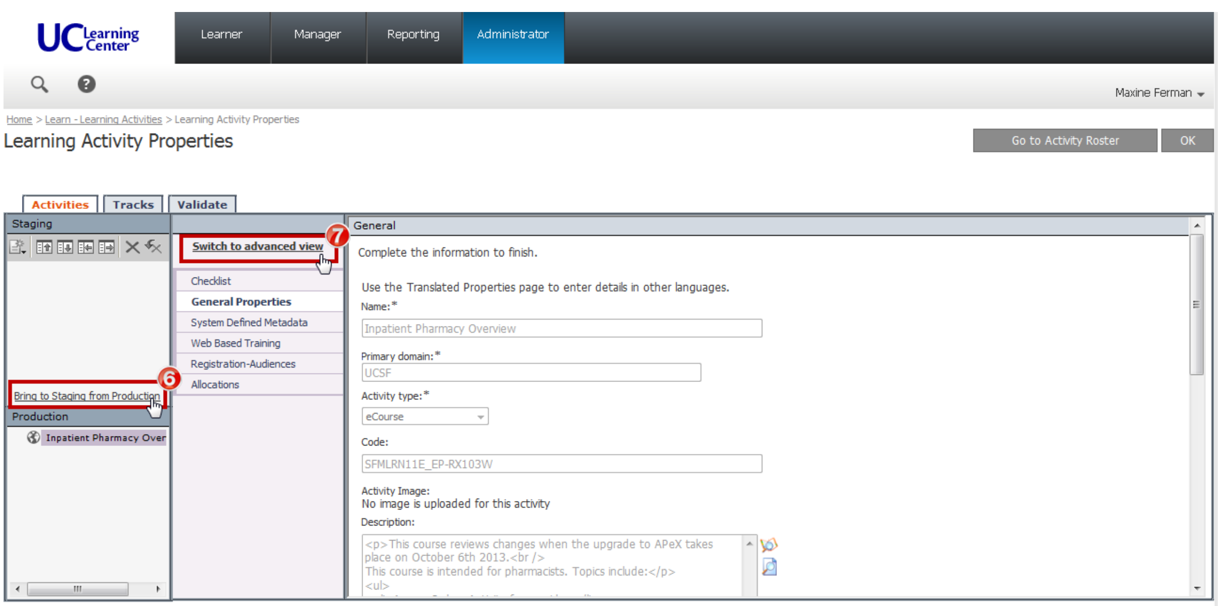
4. Confirm the correct course name and code.

5. **CLICK** the **EDIT** icon.



6. **CLICK Bring to Staging from Production.**

7. **CLICK Switch to advanced view.**

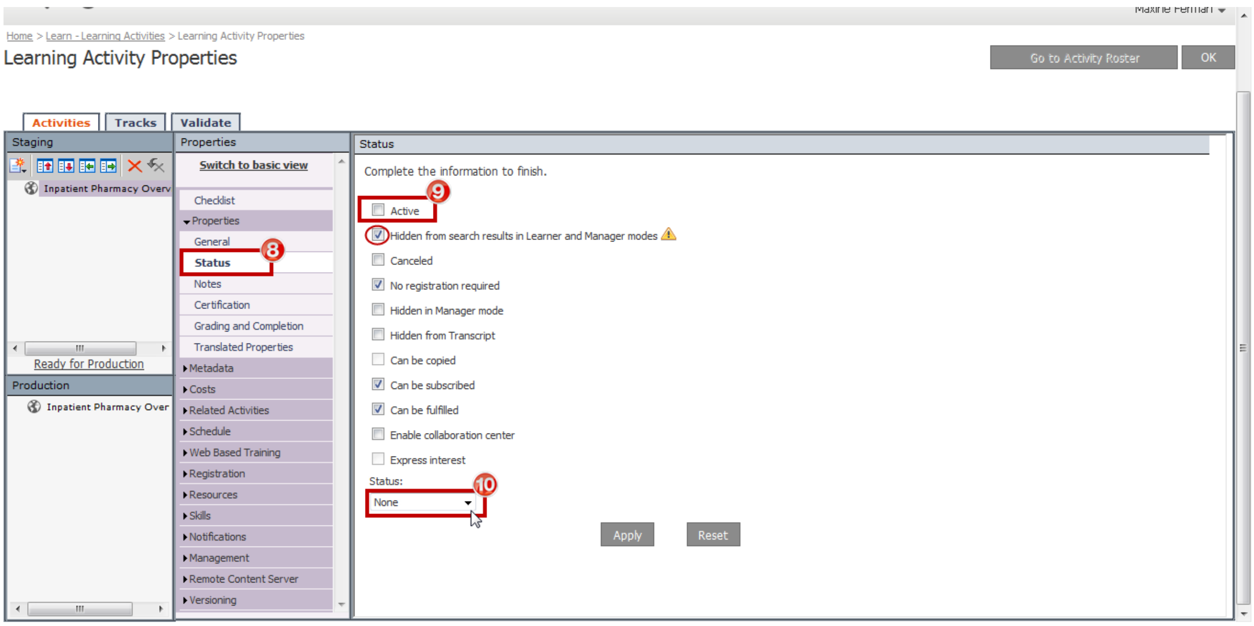


8. CLICK Properties > Status.

9. UNCHECK the **Active** checkbox.

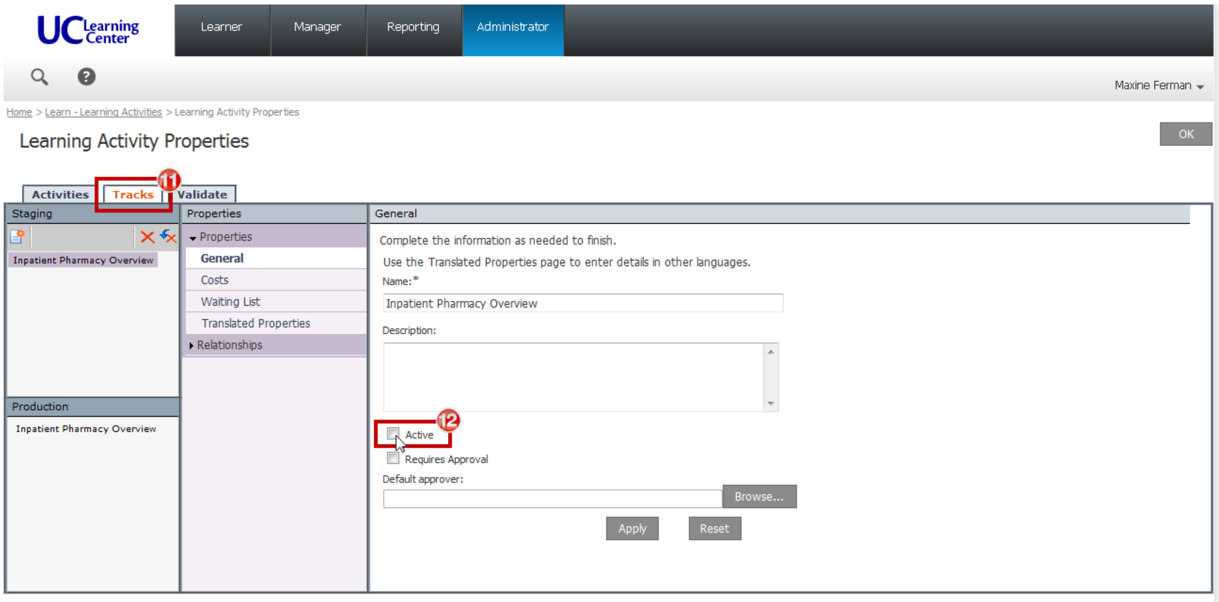
⚠ Make sure **Hidden from search results in Learner and Manager modes** remains **CHECKED.**

10. CLICK the **Status** dropdown menu to **SELECT None.**



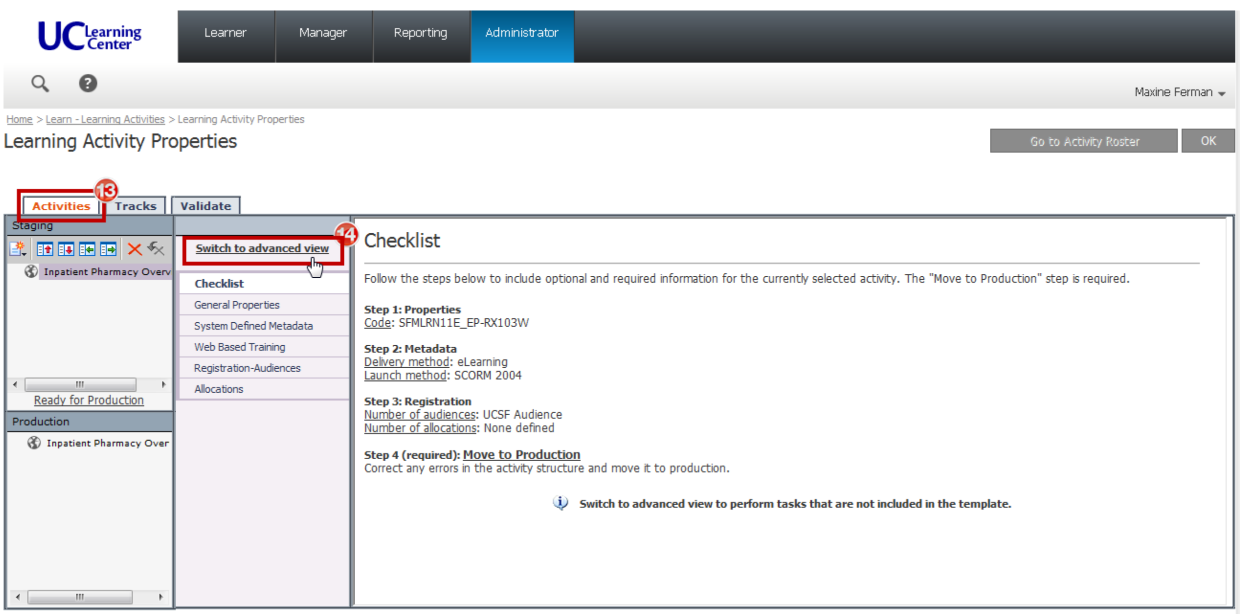
11. CLICK the **Tracks** tab.

12. UNCHECK the **Active** checkbox.



13. CLICK the **Activities** tab to return to see the main Properties in Advanced View.

14. CLICK Switch to advanced view to see other options.



11.1 Fulfillment Links

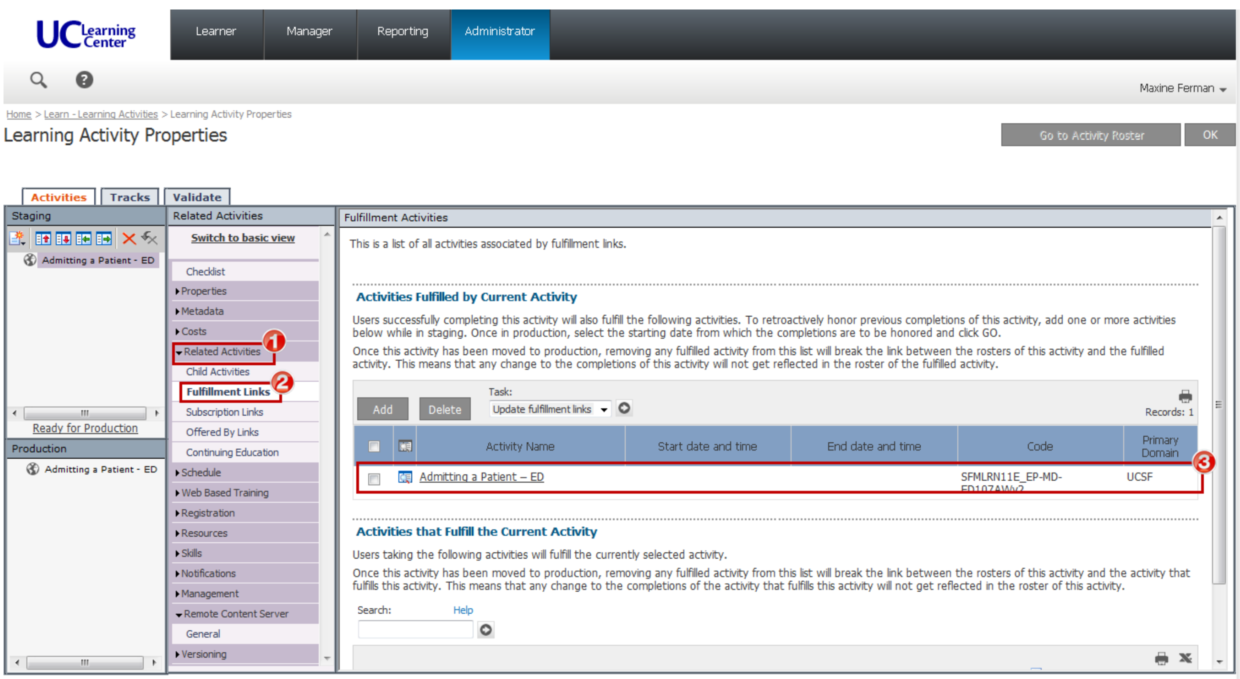
Fulfillment links create alternate ways of completing an activity. Learning activities that are equivalent can be connected via fulfillment links to provide learners options for their training.

[SumTotal Learn Enterprise 2014.1 Training Administrator Guide, pg 201]

Some existing **APeX** eCourses were added with **Fulfillment Links** because different versions of the course were uploaded to SumTotal.

To confirm if the existing eCourse has a **Fulfillment Link:**

1. **CLICK** the **Related Actives** Section.
2. **CLICK Fulfillment Links.**
3. Confirm if a **Fulfillment Link** is listed.



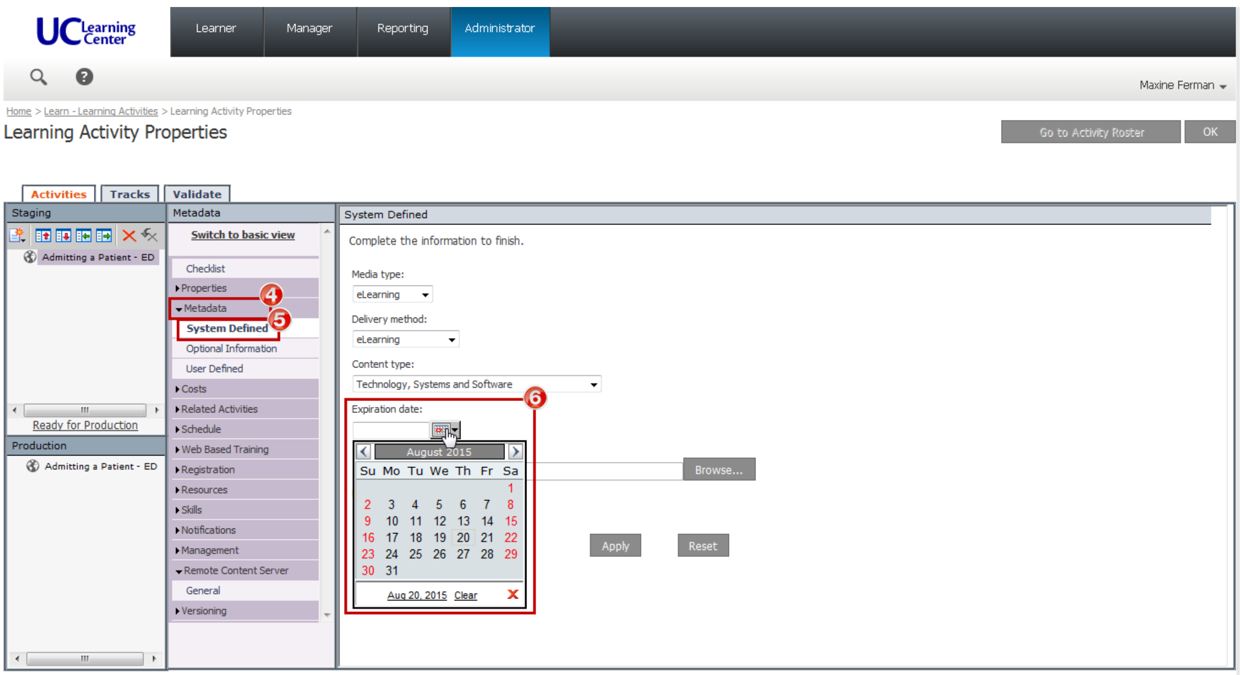
DO NOT Delete the **Fulfillment Links** because there are often dependencies that link to or from this eCourse throughout SumTotal.

If the eCourse that you are **REPLACING** was created with a **Fulfillment Link**, you need to set an **Expiration Date** to prevent users who are still **In Progress** from completing a now outdated eCourse.

4. **CLICK** the **Meta Data** Section.

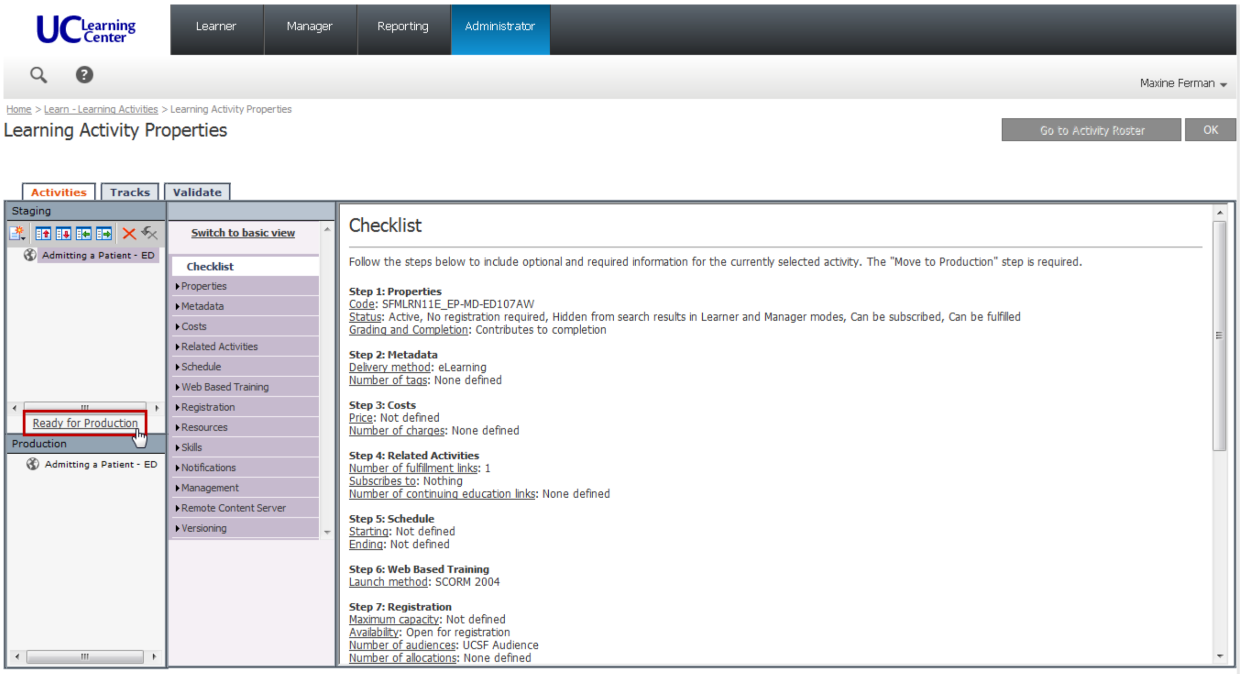
5. **CLICK System Defined.**

6. **CLICK** the **Calendar** button to set the expiration date to the **DAY BEFORE** the launch of the new eCourse.

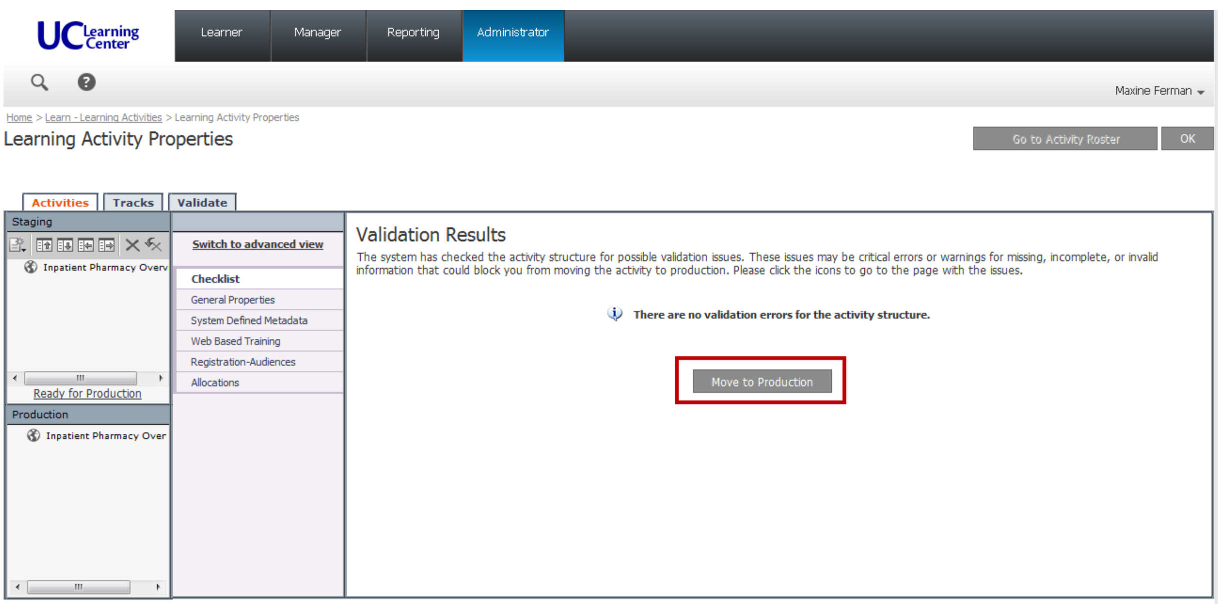


You are now ready to move the **DEACTIVATED** eCourse back into Production.

1. **CLICK Ready for Production.**



2. **CLICK** the **Move to Production** button.



Learning Services

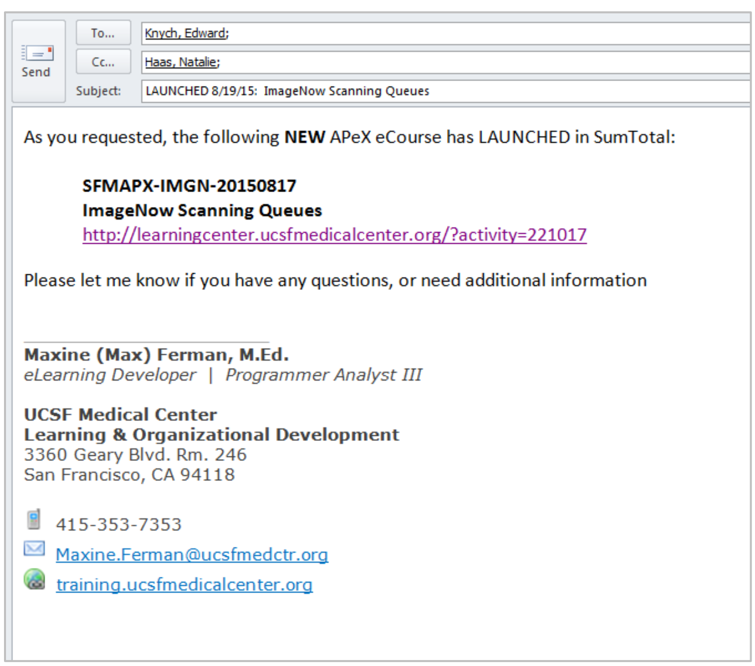
12. Notify APeX Training of eCourse Launch in SumTotal

Please send an **EMAIL TO APeX Training** contacts and **CC**: natalie.haas@ucsf.edu for **EACH .zip** file, and include the following information:

- ❑ **Subject:** LAUNCHED DATE: Course Name
- ❑ **Course Code**
- ❑ Please specify if this is a **NEW**, or **REPLACEMENT** eCourse
  If this is a REPLACEMENT, please specify which eCourse was DEACTIVATED in SumTotal.
- ❑ **eCourse** name
- ❑ **Activity Link**
  (i.e. http://learningcenter.ucsfmedicalcenter.org/?activity=221017)

⚠ Test Activity Link BEFORE you email the **APeX Training** contact.

Example:



Send
To... Knych, Edward;
Cc... Haas, Natalie;
Subject: LAUNCHED 8/19/15: ImageNow Scanning Queues

As you requested, the following **NEW** APeX eCourse has LAUNCHED in SumTotal:

SFMAPX-IMGN-20150817
ImageNow Scanning Queues
http://learningcenter.ucsfmedicalcenter.org/?activity=221017

Please let me know if you have any questions, or need additional information

Maxine (Max) Ferman, M.Ed.
eLearning Developer | Programmer Analyst III

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Learning & Organizational Development
3360 Geary Blvd. Rm. 246
San Francisco, CA 94118

415-353-7353
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training.ucsfmedicalcenter.org

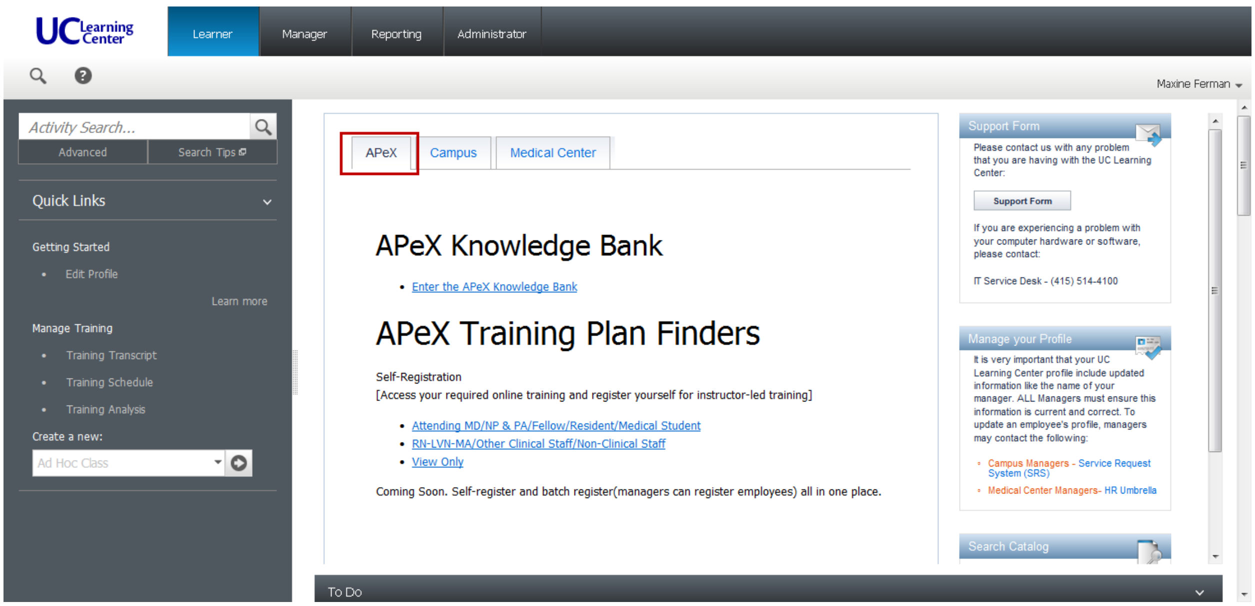
13

APeX Training

13. Update APeX Training Plan Finders

The **APeX Training Plan Finders** allow UCSF faculty, staff and students to locate **APeX** eCourses. This website is accessible to users through the UC Learning Center Dashboard.

Link: https://learningcenter.ucsfmedicalcenter.org/sumtotal/apexTrainingPlanner/index.html



To insure that all links are accurate and up to date, **APeX Training** is responsible for maintaining this website.

The criteria and requirements to update the html code for **APeX Training Plan Finders** have been established by **Learning Services**.

Please contact christopher.david@ucsf.edu for additional information.

The **Activity Link** for each **NEW** and **REPLACEMENT** eCourse is included in **Step 10**.

Learning Services:
Please CC natalie.haas@ucsf.edu on ALL emails sent to **APeX Training** that contains the final **Activity Code**.

Appendix 1

Downloading Epic E-Learning Files

Received: Revision 10/23/15
From: alissa@epic.com

Two individuals per customer can download Epic's e-learning files. They are responsible for distributing Epic's e-learning files and the information in this document to the rest of the organization according to the following rules. To gain access to the files, these two individuals must take a quiz.

Contact e-learningsubmissions@epic.com to access the quiz.

RULES OF THE ROAD: Information related to Epic software is confidential. This includes e-learning materials. Thus, you must treat them accordingly and use reasonable security measures to protect them. Current Epic-approved measures are outlined here:

- Individuals that access e-learning materials stored on your network need to have unique, trackable access credentials.
- Host the content on a secure intranet or Learning Management System (LMS). Do not store the materials on any transportable storage medium such as on a laptop or thumb drive.
- If you plan to host Epic's content through a third-party LMS, send an email to VendorInquiries@epic.com to ensure that the third party has an agreement in place with Epic.
- When posting these materials, ensure that only your employees and staff can access them. The materials may not be provided to any third parties, including consultants, outsourcers, or other vendors, without prior written approval.
- Members of your organization accessing published e-learning files for educational purposes must have read-only access; they must not be able to copy the html and swf files to their personal hard drives or to any location outside the secure network drive or LMS.
- Access to published and source (Captivate) files should be limited to only those individuals that need them as part of their professional duties.
- The individuals with e-learning downloading access are responsible for ensuring appropriate security and distribution.
- If you make any changes to our materials, retain copyrights statement and domain validation widget on them, as described later in the document.

If you have questions related to any of the e-learning files or about e-learning in general, contact: e-learningsubmissions@epic.com.

<u>DOWNLOADING FILES</u>: If you are one of the two individuals per customer who can download e-learning files, follow these steps to access them via Training File Delivery Service (TFDS):

1. While logged into your organization's network domain, go to https://captivate.epic.com.
2. At the login window, enter your UserWeb credentials.
    a. If needed, reset your password here: https://userweb.epic.com/Account/ResetPassword.
3. Once logged in, select the application for which you need e-learning.
4. Select the version.
5. Select the type of file you want to access:
    - **Published**: The viewable, non-editable, end-user facing lessons. You host these as-is on your secure intranet or LMS.
    - **Scripts:** The Word documents that Epic uses to plan and create the lessons.
    - **Source:** The editable (mostly Captivate) source files. These are only needed if you intend to modify Epic's e-learning lessons. Epic 2014 lessons were mainly created using Captivate 6. Epic 2015 lessons were mainly created using Captivate 8. If you use an older version of Captivate, you will not be able to make use of these source files until you upgrade Captivate. These files are about 50-100 MB each. If you have limited storage capacity, think carefully about which files you need.
6. To download individual lesson files, right-click on the file, select Save link/target as, and save the file to a secure location.
7. To download all of the lessons in that directory at once, right-click on the .zip file (i.e. Published.zip, Scripts.zip, or Source.zip), select Save link/target as, and save the file to a secure location.
    a. If you downloaded all of the lessons in a .zip file, right-click on the saved .zip file and click Extract All. Then click Extract.

CAN'T FIND A LESSON? Some lessons are not tied to a specific application.

- **Lessons with the CLN prefix:** These are located in both the EpicCare Inpatient and EpicCare Ambulatory folders.
- **Lessons found in the General folder:**

• Cache System Management • Charge Router • Data Courier • Foundations • General (In Basket and Prerequisites)	• Identity • Integrated Charging • Lucy • Other Tech Topics • Reporting	• Security • SmartForm • System Pulse • Training Env & Doc (TED)

WHAT ARE THESE DIFFERENT PUBLISHED FILES? The following files are found in the Published folders:

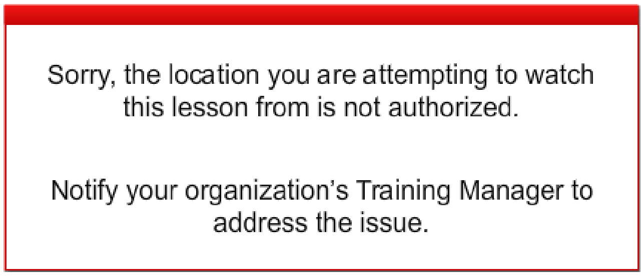
- **SCORM 1.2** – Host these on an LMS that uses SCORM 1.2 settings. Each lesson downloads in a zipped folder, which you then host on your LMS.
- **SCORM 2004** - Host these on an LMS that uses SCORM 2004 settings. Each lesson downloads in a zipped folder, which you then host on your LMS.
- **AICC** - Host these on an LMS that uses AICC settings. Each lesson downloads in a zipped folder, which you then host on your LMS.
- **No LMS Settings** - Host these on a secure Sharepoint or Intranet. Contains the following:
    - **SWF** - Playable Flash lessons produced from the Captivate source files.
    - **HTM** - Depending on how your host your lessons, these might be unnecessary. Sometimes, it is not possible to link directly to a SWF file in which case, you link to an HTM file that points you to the SWF file.
    - **JS** - This Java Script file is only needed if you intend to make use of the HTM files.
    - **Captivate.css** - This Cascading Style Sheet causes the lessons to resize to fit the size of the window in which they are being played.
    - **Check.txt** – This file is needed if you are playing the files from a local directory, such as a Desktop when you are reviewing lessons. Review the information under the “Played Locally” header.

VIEWING PUBLISHED LESSONS: The domain validation widget ensures that both Epic and customer- created e-learning lessons are not viewable by those who are not authorized. The widget has already been installed in all of Epic's e-learning lessons. It checks to see if your domain is on a list of approved domains or that you have the appropriate check in place to play the lessons locally. The following explains the necessary steps to ensure the domain widget works and lessons play successfully.

There are three scenarios in which you would view e-learning lessons.

1. Played from a web server (includes most hosted learning management systems)
2. Played locally (such as from your Desktop when editing/reviewing a lesson)
3. Played from Captivate preview

If you do not follow the instructions below to allow the widget to play, viewers will receive the following error message when attempting to view Epic-created e-learning lessons.



PLAYED FROM A WEB SERVER:

IMPORTANT! Test one lesson before posting all lessons to a web server.

1. If you are posting lessons online via a secure LMS or website, make sure Epic has the web address (URL). You can verify this by sending the URL to E-LearningSubmissions@epic.com.
2. Then, test that it is working by taking ONE of Epic's e-learning lessons and posting it to the web server. Test to make sure it plays. If it plays, you can proceed loading all lessons.

PLAYED LOCALLY:

1. If you are hosting lessons on an internal network location or intranet, a check.txt file must reside in or above the directory in which the lessons are located. The check.txt file allows you to watch the lesson locally without being blocked by the widget. If you have many lessons located in a few folders, place the check.txt file at the highest folder level so you do not need a check.txt file in every folder for each lesson.
2. You can download a check.txt file from any "No LMS Settings" published folder on TFDS or from the Create tab on https://welearning.epic.com/.
3. This check.txt file will need to reside in any location where the lessons will be played from or where you will be working on the lessons. If you work on the lessons from your desktop, you will want a check.txt file located on your desktop as well.

PLAYED FROM CAPTIVATE PREVIEW:

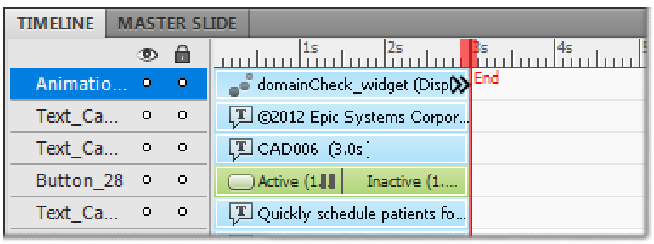
1. When testing via preview mode, start previewing after the introduction slide (which houses the widget). Use "From this Slide" or "Next 5 slides" to avoid getting the widget error.

EDITING CAPTIVATE FILES

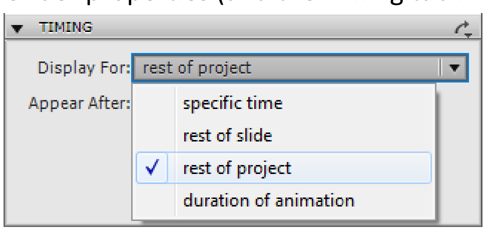
DOMAIN VALIDATION WIDGET: When editing or creating Captivate files that show Epic screenshots, ensure that the domainvalidation widget is in place using the following steps:

- **Installing the Domain Validation Widget using HTML5:** To access an alternate Domain Validation Widget, contact E-LearningSubmissions@epic.com.
- **Installing the Domain Validation Widget using SWFs (this is the most common format):** The domain validation widget is installed by default to all Epic e-learning lessons. Do not remove the widget. If you have or will be creating your own e-learning lessons that contain Epic's proprietary information, you will need to install the widget.

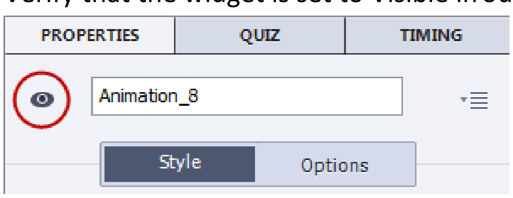
1. Download the domainCheck_widget.zip package from the Create tab on https://welearning.epic.com/ and extract.
2. Copy the check.txt file from the .zip package to any local/internal file directory where you develop and test e-learning. Placing the check.txt file at a higher level will allow more e-learning lessons to play. If you play e-learning lessons from your desktop, you will need to copy the check.txt file there as well.
3. Open lesson in Captivate.
4. On the first slide of your lesson, go to Insert > Animation, and select the domainCheck_widget.swf.
5. The widget will appear on your timeline and centered. Adjust alignment if necessary.
6. Select the widget from the timeline and open Properties (Window >Properties).



7. Under properties (and the Timing tab in Captivate 8), set Display For: to "rest of project."



8. Verify that the widget is set to Visible in output



9. Lock and hide the domain check widget layer on the timeline to see the layers under it.
10. Publish and test the lesson. Make sure the widget warning doesn't appear when the appropriate safety measures are in place and does appears when they are missing.

COPYRIGHT STATEMENTS: All of Epic's e-learning lessons display a copyright statement on the first slide of each lesson. Do not remove or alter the following statement:

©2015 Epic Systems Corporation. Confidential. This material should be stored securely and may not be distributed publicly.

If you create your own e-learning lessons, please clearly display the following statement on the first slide:

This material contains confidential and copyrighted information of Epic Systems Corporation.

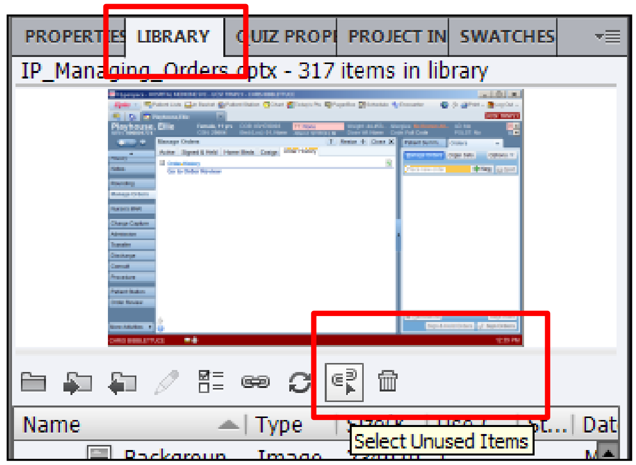
Appendix 2

Pre-Publish Checklist and Quiz / Assessment Answer Key

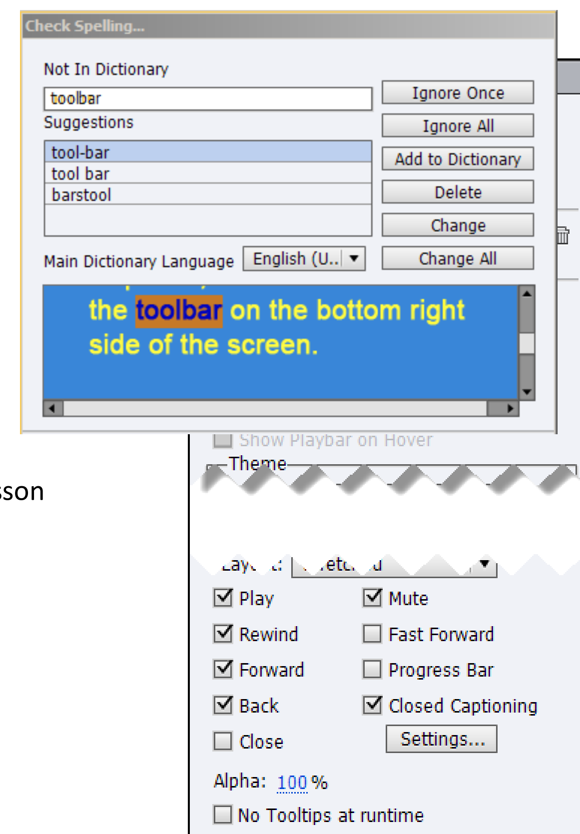
Received: 8/17/15
From: Edward.Knych@ucsf.edu - **APeX Training**

When you've completed production on your e-Learning lesson and you're ready to publish, make sure these pre-publishing items are set correctly. Then, create an Answer Key for your lesson testers.

- **Purge Unused Items** –Unused items in the presentation file system take up space and increase .cptx file size.
  - On the right side of the screen click the Library tab.
    - If the Library tab is not there, click Window in the menu bar and choose Library.
  - Click the Select Unused Items button (the icon is a broken chain link).
  - Captivate will highlight unused items in the Library file list and the garbage can icon will light up.
  - To remove the unused items click the garbage can icon.
  - If the can icon doesn't light up and no files are selected, assume there are no unused files to purge.

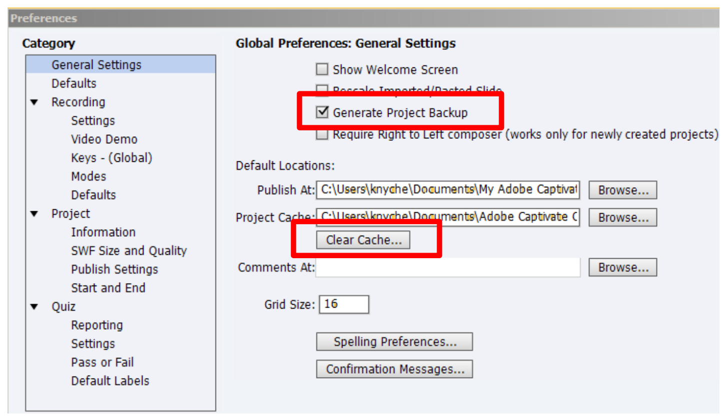


- **Spell Check** – Make sure everything is spelled correctly before publishing.
  - Click the Project Menu and select Check Spelling, or just press the F7 key.
  - The spell checker starts searching for misspelled words. You have the option of replacing them.
  - Sometimes it doesn't catch everything, so keep a sharp eye out especially in on screen text boxes and closed captions.
  - The spell checker may not recognize many medical terms, so when it stops at one make sure you visually inspect it and confirm that it is spelled correctly.
- **Skin Editor** – Allows you to change elements of the Lesson Interface.
  - Click Project in the menu bar
  - Choose Skin Editor
  - Make sure these items are checked



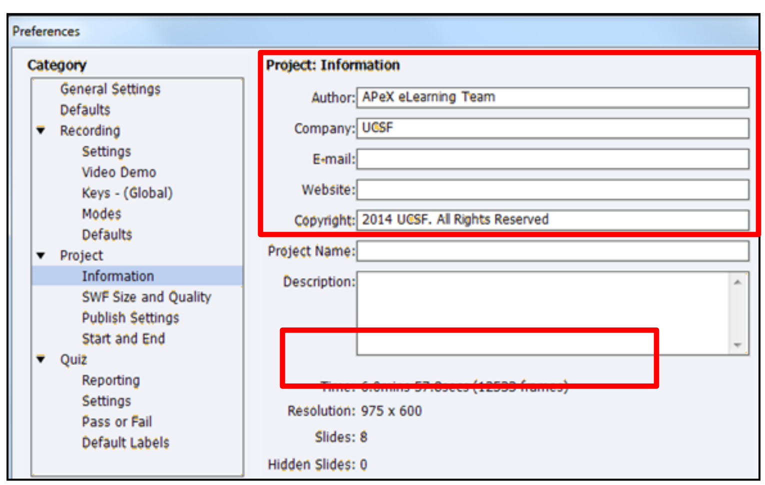
        - Show Playback Control,
        - Hide Playbar in Quiz
        - Closed Captioning
    - Uncheck Progress Bar
        - The Progress Bar appears at the bottom of the playback screen and contains the “scrubber handle” that allows users to move back and forth at will within a presentation.
        - Excessive use of the “scrubber handle” can cause the playback of the lesson to lose its place. This can lead to sync problems between audio and video. Sometimes the lesson will freeze up.
        - Removal of this tool enforces the logical flow of the lesson. We want users to navigate through the course as we designed it.

- **File – Project Info**
    - Under <u>General Settings</u> - Check the Generate Project Backup checkbox. This tells Captivate to automatically create a backup file of your project. Not a bad idea if your project file gets corrupted, but it saves the backup in the same folder as your project file so if the folder gets corrupted or your hard drive crashes, it’s not much help. <u>Suggestion</u> – Create the backup and move that file to another drive like the “P” drive, or to your own area of BOX.



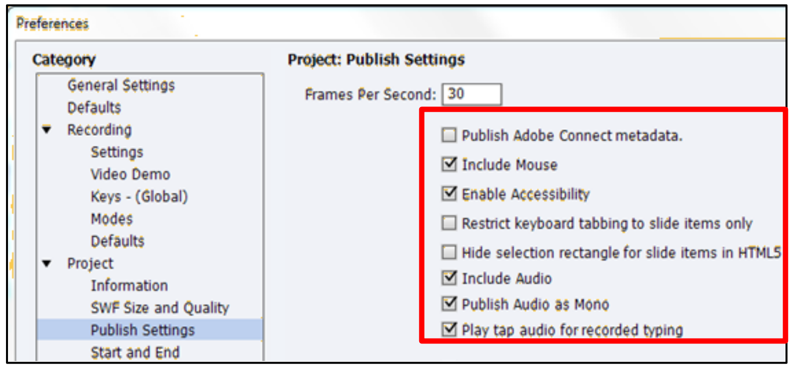
    - Click the Clear Cache button - The cache contains temp files for all projects you are working on, but it doesn’t empty by itself. Good idea to clear it every now and then to clean up disk space.

    - Under <u>Project, Information -</u> Update the Copyright information to the current year. You can also change the authorship information if necessary.
    - Note the Time information for the project. Copy the length (in minutes, not seconds) to slide 2 of the lesson module.
    - If the number of seconds is greater than or equal to 30, round up the minutes by 1. Less than 30, leave the minutes number as is.

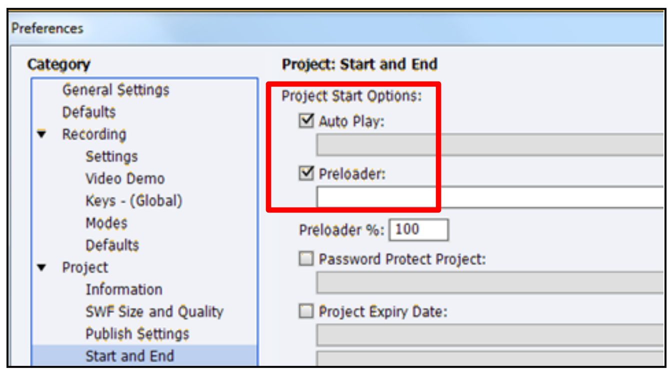


- o This is also where you can see the project resolution. The resolution should be set at 975 x 600, though that may change in the near future.

- o Under Project, <u>Publish Settings</u> , make sure these boxes are checked
  - Include Mouse
  - Enable Accessibility
  - Include Audio
  - Publish Audio as Mono
  - Play tap audio for recording typing.



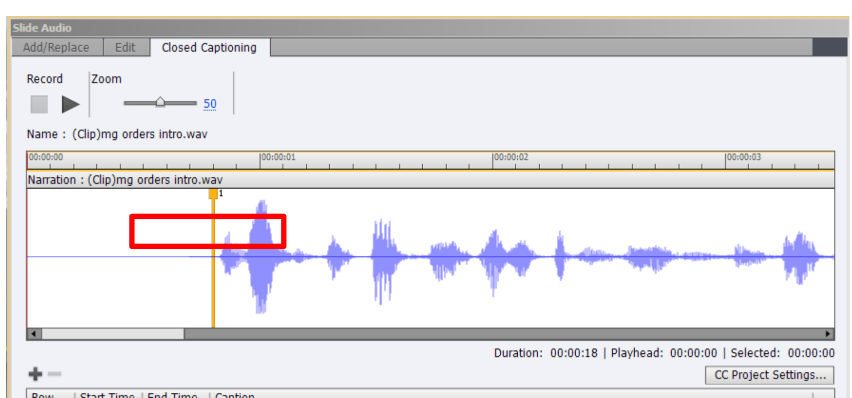
- o Under Project, <u>Start and End</u>
  - **Important – Under Project Start Options, check the Auto Play box.** Auto Play skips the Start button that appears for a few seconds while the lesson Preloader is spooling, and starts the lesson automatically once it is fully loaded. If Auto Play is not checked the lesson may hang.
  - Check the Preloader box. This makes Captivate display the percent loading while the lesson is spooling up.



Closed Captions – This is part of Section 508 compliance. All lessons with an audio narration track should also have closed captioning for the hearing impaired. How and when you insert closed captioning is up to the individual developer, but there are some final pre-publishing settings to check for.

<u>Adjust Closed Caption triggers:</u>

- To make your closed captions appear in synch with the narration, set the trigger points accordingly. If you add or delete portions of audio narration <u>**after**</u> you have set up closed captions and triggers, please make sure that you haven't upset the timing of the triggers so the closed captions continue to appear on cue.

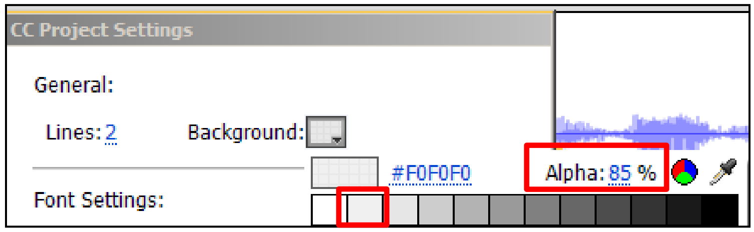


<u>Access Closed Caption appearance settings:</u>

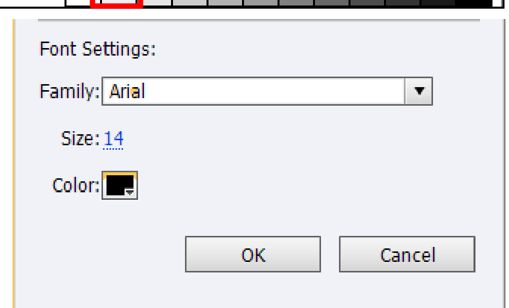
- Open any narrated slide and right click on the audio track in the timeline at the bottom of the screen.
- From the menu that appears, choose Closed Captioning.
- In the Slide Audio box, the Closed Captioning tab is selected.
- Click CC Project Settings.

Adjust Closed Caption Project Settings:

- Lines - Set to 2. Add no more than 2 lines of captions in any closed caption block. If there are more lines than 2 they will not appear onscreen.
- Background Color – A light grey. Click the drop down arrow and choose the second swatch in the first line.



- Alpha (or Transparency) – The space where the closed captions appear should be solid enough so the screen content behind the captions does not interfere with the visibility of the captions. Transparency is set by adjusting the *Alpha number*. 100 is totally solid, 0 is totally invisible. A setting of 85 strikes a nice balance. (Also see "Obscuring objects onscreen" below).
- Font Settings – Family - Arial, Size - 14, Color - Black.
- Click OK when finished



Closed Caption Spelling – Use the Captivate spell checker to check the Closed Captioning.
Obscuring objects onscreen – At times it may be unavoidable that onscreen clickable objects appear behind the closed captions. Captivate is designed so that you can click right through the closed caption box at the bottom of the screen to select an object.

- **Suggestion:** Practice and Quiz slides are not narrated, hence there are no captions. On the intro slides to Practice and Quizzes, add a line of text on screen suggesting that the viewer can temporarily turn off closed captions so any onscreen objects are not obscured by the caption box.

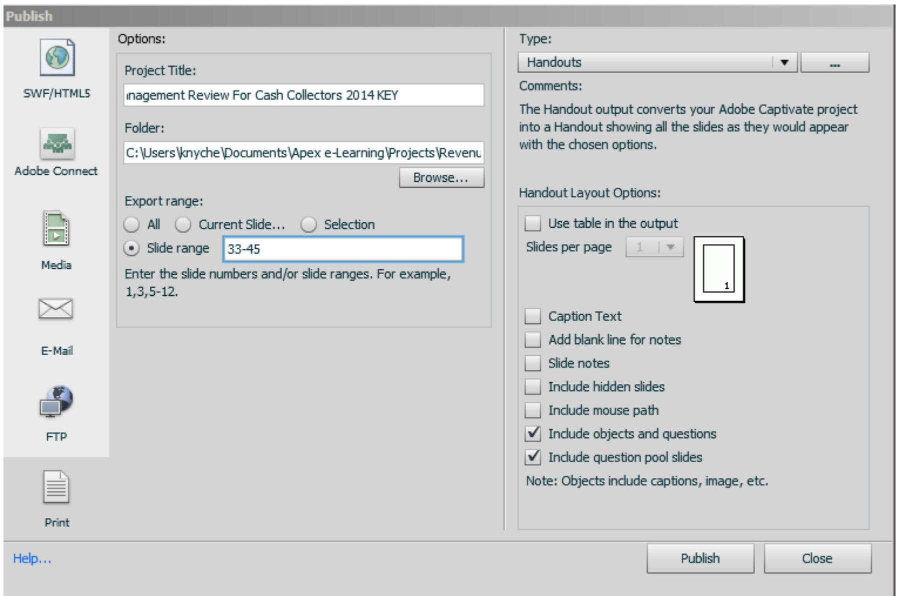
Create an Answer Key for quizzes and assessments

Having an answer key available to e-Learning testers makes their job a whole lot easier – they don't have to actually learn the course content to test passing the quiz.

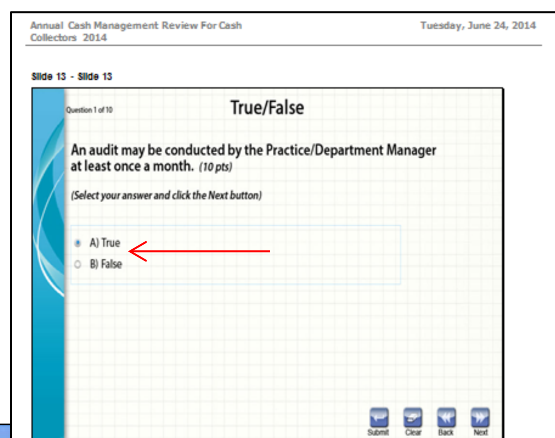
To make an answer key:

1. In Captivate on your finished project use the Filmstrip to navigate to the introduction slide for the quiz and make a note of that slide number.
2. Then use the Filmstrip to navigate to the quiz results slide and make a note of that slide number.
   - You now have the slide range to publish for the answer key.
3. Click Publish.
4. On the left column of buttons under Publish, select the last one – Print.
5. For the project title, use the same project title you are using but add the work KEY at the end.
   - Example: *Annual Cash Management Review For Cash Collectors 2014 KEY*
6. For the publish Folder choose the same one as the project files.

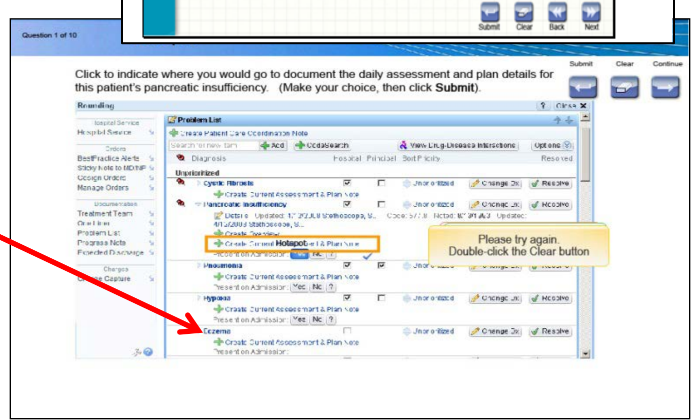
7. For the Export range enter the slide range numbers you recorded in steps 1 & 2 above.
8. **NOTE**: If your quiz questions are scattered throughout your lesson, follow the steps above and then enter the slide ranges into the Slide Range field separated by commas. Ex: 12-17, 29-37, 67-74, 99-107.
    - Alternatively, you can just print the whole lesson and go in to the Word document afterwards and delete all slides that are not quiz questions.
9. In the right column, under Type choose Handouts.
10. Under Handout Layout Options, <u>uncheck</u> Use Table in Output.
    - The tables Captivate creates make the slides rather small and hard to read and manipulating them gets to be difficult and frustrating.
11. Check the boxes for *Include objects and questions* and *Include question pool slides*.
12. Here's a screen cap.



13. Click Publish. When it's finished it will ask if you want to view the output in Word. Do so. Here are two typical quiz slides.



14. On Multiple Choice and T/F questions the checkbox next to the correct answer(s) will be marked.



15. Hot spot answers may not be so obvious. In Word you can add shapes to the slides to identify the answer.

16. Save your changes, if any. Distribute the key as needed to testers.
17. **IMPORTANT** - DO NOT LET THE ANSWER KEY GET INTO GENERAL CURCULATON, ESPECIALLY FOR ASSESSMENTS.

Appendix 3

e-Learning Quiz and Assessment Settings

Received: 8/17/15
From: Edward.Knych@ucsf.edu - **APeX Training**

Defining Quizzes vs. Assessments

- Quizzes usually come at the end of a lesson, though the questions may also be dispersed throughout a lesson. User must pass a quiz to complete the lesson. We eventually give away all the answers even though we score the quiz attempt.
- Assessments have no lesson content, they are all questions, no revealing of answers - like a final exam. Student must pass in order to receive Apex credentials (Med Students, Residents, CRC's). They usually get 3 attempts to pass.
- Most of our e-Learning lessons have quizzes attached to them. The few that don't require a different setup. This document will cover set up for Lessons with and without quizzes, and for Assessments.

There are two types of settings for Quizzes/Assessments – module wide and per question. We'll start with the module-wide settings.

Module –Wide Settings

- These settings affect all questions in a quiz/assessment.
- Access Quiz Settings in one of two places - via File> Project Info, or through Quiz>Quiz Preferences. Both options will present you with the same screen.

Set up for Lessons with a Quiz

Quiz settings – Reporting

- Click to place a checkmark in the checkbox for Quiz – Enable reporting for this project.
- For LMS choose Other Standard LMSs
- In the Standard dropdown menu choose SCORM 2004 – no need to use the Configure button.
- Template - Default
- COMPLETION CRITERIA
  - Check Slide Views and or Quiz
  - Uncheck slide views
  - Check Quiz
  - Select Quiz is Passed from the drop down
- Uncheck Success Criteria – we are only tracking completions here
  - You can uncheck Slide Views and Quiz is passed under Success criteria for neatness sake, but since Success Criteria is unchecked, Captivate ignores those settings.
- Check the Interaction Data box under Data to Report

Quiz settings – Settings

- **Name** - Quiz
- **Required** – Answer All –User must answer every question to continue

- **Objective ID** – leave at the default
- **Settings** - Click check boxes for:
  - Show Progress
  - Progress type drop down is Relative
  - Show Score at end of the Quiz
  - Hide Playbar in Quiz
  - **NOTE**: Do <u>not</u> check Submit All. That is for Assessments only.
  - Quiz Result Messages – Click this button and set the results to:
    - o Pass message –"Congratulations, you passed! Click the Continue button."
    - o Fail Message – "You did not score 80% correct for completion. You may retake the assessment by clicking the Retake button. Click the Continue button to exit the lesson and return later."

<u>Quiz settings – Pass or Fail</u>

- **Pass/Fail options** – 80% or more to pass (let the computer do the math). Just make sure you have an amount of questions where 80% equals a whole number.
  - o Example - on a 7 question quiz, 80% equals 5.6. How do you get a .6 question?
  - o If you decide to use an "80 points to pass" score, make sure the total quiz point values add up to 100.
- **Passing grade and Failing grade <u>Actions</u>**.
  - o <u>If Passing Grade</u> – choose Go to next slide. The Results text message will inform them if they pass (see Quiz Result Messages above).
  - o <u>If Failing Grade</u> – Allow user 3 attempts, Show Retake Button. The action should be Go to the next slide. The Results text message will inform them if they fail (see Quiz Result Messages above).
    - ▪ **<u>NOTE</u>**: Both Action options refer to what happens when the user clicks the Continue button. Both should direct the user to the last slide. If they want to retake the quiz they should click Retake. They can also choose to quit by clicking Continue and return later to attempt the quiz again.
    - ▪ The last slide in a lesson is a neutral "You are at the end of this lesson" message where they are directed to click "X" to close the lesson. This will force them to click the "X" to close the presentation and (hopefully) register a complete/incomplete result on the LMS.

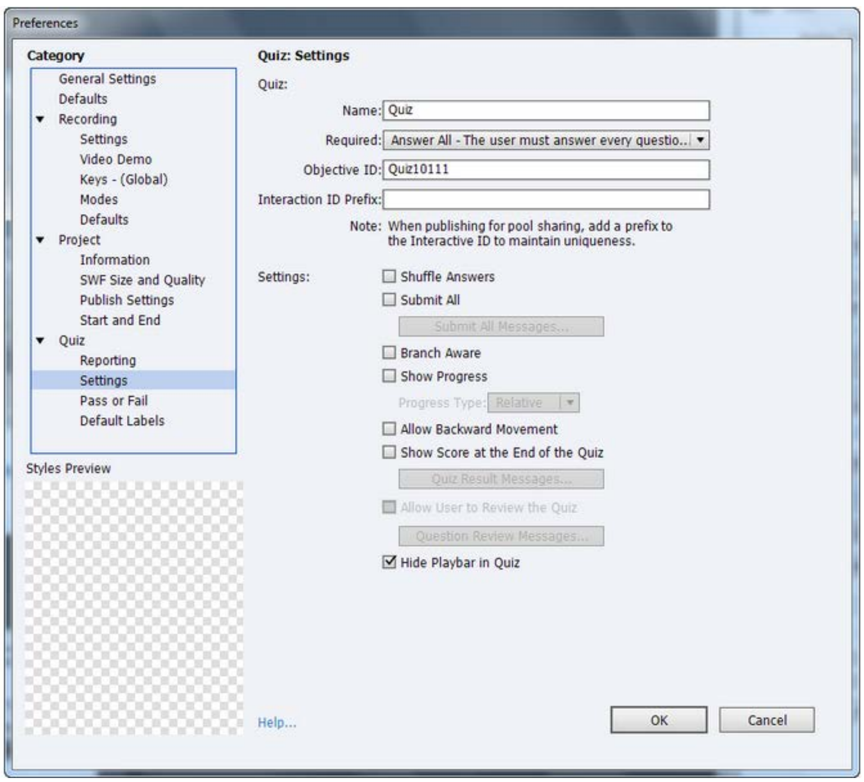
Set up for Lessons without a Quiz

Quiz settings – Reporting

- Click to place a checkmark in the checkbox for Quiz – Enable reporting for this project.
- For LMS choose Other Standard LMSs
- In the Standard dropdown menu choose SCORM 2004 – no need to use the Configure button.
- Template - Default
- COMPLETION CRITERIA
  - Check Slide Views and or Quiz
  - Check slide views
  - Check 100%
  - Uncheck Quiz
  - The Quiz drop down is greyed out
- Uncheck Success Criteria – we are only tracking completions here
  - You can uncheck Slide Views and Quiz is passed under Success criteria for neatness sake, but since Success Criteria is unchecked, Captivate ignores those settings.
- Check the Interaction Data box under Data to Report

Quiz settings – Settings

Since there is no quiz, these settings are ignored. **Still, make sure the screen looks like this.**



Quiz settings – Pass or Fail

Again, no quiz, so most of these settings don't matter.

- **Pass/Fail options** –0% or more to pass
- **If Failing Grade -** Allow user Infinite attempts, Show Retake Button.

Set up for Assessment modules

This setup is like the Lesson with a Quiz, with some important differences.

Quiz settings – Reporting

- Click to place a checkmark in the checkbox for Quiz – Enable reporting for this project.
- For LMS choose Other Standard LMSs
- In the Standard dropdown menu choose SCORM 2004 – no need to use the Configure button.
- Template - Default
- COMPLETION CRITERIA
    - Check Slide Views and or Quiz
    - Uncheck slide views
    - Check Quiz
    - Select Quiz is Passed from the drop down
- Uncheck Success Criteria – we are only tracking completions here
    - You can uncheck Slide Views and Quiz is passed under Success criteria for neatness sake, but since Success Criteria is unchecked, Captivate ignores those settings.
- Check the Interaction Data box under Data to Report

Quiz settings – Settings

- Name - Quiz
- Required – Answer All –User must answer every question to continue
- Objective ID – leave at the default
- Settings - Click check boxes for:
    - Shuffle Answers is Optional
    - **CHECK Submit All**
    - Submit All Messages button
        - The default messages Captivate supplies for the Submit All Messages are OK to use, so leave them as they are.
    - Check Show Progress
    - Leave the Progress Type drop down set to Relative
    - **Check Show Score at end of the Quiz**
    - Quiz Result Messages button – click and set the results to:
        - **Pass message** - Congratulations, you passed! Click the Continue button.
        - **Fail Message** - You did not score 80% correct for completion. You may retake the assessment by clicking the Retake button. Click the Continue button to exit the lesson and return later.
    - Check Hide Playbar in Quiz

Quiz settings – Pass or Fail

- **Pass/Fail options** – Just like Lesson with Quiz - 80% or more to pass, make sure you have an amount of questions where 80% equals a whole number.

- **Passing grade and Failing grade <u>Actions</u>**.
    - <u>If Passing Grade</u> – choose Go to next slide. The Results text message will inform them if they pass (see Quiz Result Messages above).
    - <u>If Failing Grade</u> – Allow user 3 attempts, Show Retake Button. The action should be set to Go To The Next Slide. The Results text message will inform them if they fail (see Quiz Result Messages above).

<u>Individual Per-Question Settings</u>

Before making Per-Questions settings you must select a question slide. To set the options, click the Quiz Properties tab on the right side of the screen.

- Set Type to Graded
- The number of answers will vary per question. (<u>T/F</u> will always be just 2. <u>Multiple Choice</u> is as many as you want within reason. <u>Hot Spot</u> should only be set to 1).
- Shuffle Answers – This option shuffles the order of MC and T/F answers from session to session. Using this option is up to the developer and the SME.
- Points - Each question should have a points assignment that -when added with all other questions – equals 100
- Penalties - Leave set at 0.
- Multiple Answers - If you want a Multiple Choice question to have more than one answer, check this checkbox. You can set how you want the questions to be scored…
    - Selecting all the correct answers in a Multiple Answer arrangement will give the user full credit for the question. If they miss one, they get no credit, UNLESS….
    - You click the <u>Partial Score</u> box so a user who selects at least one of the multiple correct choices will get a partial credit. (The computer will work out the math).
- FOR HOT SPOT QUESTIONS
    - Choose an animation that will play when a user clicks to make a Hot Spot selection. Click Browse or accept the default.
    - <u>DO NOT CHECK</u> Allow Click Only On Hotspots. That will give away the answers, and that is not the aim of an Assessment.
- Numbering - For Multiple Choice answers, make sure your numbering criteria is consistent for all questions.
- Options/ Captions
    - For NON-ASESSMENT QUIZZES, you can check the Correct and Incomplete checkboxes to prompt users when they get the answer correct.
    - For ASSESSMENTS, <u>leave these all unchecked</u>. We do not want any captions saying that a user got the question right or wrong.
- Options/Time Limit
    - We currently do not set time limits on questions. Leave unchecked.
- Options/Buttons
    - For NON ASSESSMENT QUIZZES, check Clear, Back and Next.
    - For ASSESSMENTS, Back and Next are already selected when you choose the Submit All option. Check the Clear box too.
- Reporting
    - Check the Report Answers box.
    - Let Captivate supply the Interaction ID.

Results Screen

- The Results screen follows the last quiz question (though you can move it around in the module). This is where Captivate displays the results of the quiz.
- Select the Results screen slide, click the Quiz Properties tab and check all the boxes.

Appendix 4

e-Learning Testing Instructions

Received: 8/17/15
From: Edward.Knych@ucsf.edu - **APeX Training**

In order to ensure that the e-Learning lessons we create work properly under many different conditions, we test lesson files after they are loaded to the LMS. We test under Windows 7 and Mac OS X. Windows XP is no longer supported by UCSF IT.

On Win 7 we test against these browsers:

- Microsoft Internet Explorer version 8 - higher versions are not officially supported.
- The latest version of Firefox
- The latest version of Google Chrome

With Firefox and Chrome, please check that you have the latest upgrade.

When we test for Mac we use whatever Mac hardware and software we have available. Since UCSF does not supply us with Macs, we use our own personal equipment. Mac testers can use whatever OS X version they have installed. Please test the following browsers

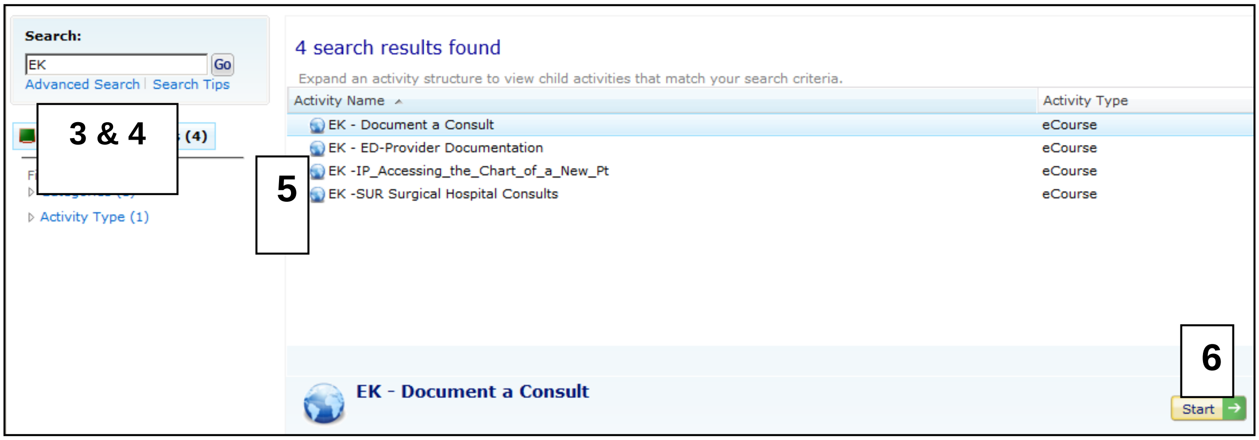
- Safari – The latest version your OS will support.
- Firefox – The latest version your OS will support.

Despite their popularity, we do not currently test on any Android or iOS devices.

We do not have the time to completely test each lesson for every unique browser/OS setup. The test instructions have been written to compensate for this.

Step by Step Instructions

1. Go to the **UCSF Learning Center** at learningcenter.ucsfmedicalcenter.org, or use the link on the Carelinks page.
2. When prompted enter your **Employee ID**, no password is required.
3. After you logon, click in the **Search Box** on the left side of the screen (see below).
4. Names of files uploaded to the LMS for testing are preceded by the upload requestor's initials. Depending on what file you want to test you will type in the initials of the upload requestor - for example – EK for Ed Knych - and click the **Go** button.
5. You will see a list of lesson modules all starting with the initials you entered. **Single-click** on the module you want to test.
6. Then click the **Start** button to start the lesson.



7. After the lesson opens, proceed as if you were a student. Follow all onscreen instructions. Make sure you turn on Closed Captioning to see if that works.
8. At some point in the lesson make a note of where you are and then abandon the course by clicking the **X** button in the upper right corner of the lesson screen**. Don't close the Learning Center screen, just the lesson screen.
   - **Mac users would click the red dot in the upper left corner.
9. After closing the lesson the LMS *should* display your status as **Incomplete**. Please make a note of the result.
10. **Log off** of Learning Center and close your browser.
11. Now log back to Learning Center with **a different browser** than you used the first time.
12. Access the same lesson again and see if it launches at the place you abandoned it. Make a note of that result.
13. <u>Windows users</u> - go through the lesson for another set of slides and then quit the lesson again. Repeat steps 8 – 12 above using the third browser.
   - <u>Mac testers</u> can skip step 13 since we only require you to test 2 browsers.
14. Finish the lesson and take the quiz at the end (if present).
15. **IMPORTANT** - Purposely ***fail the quiz*** the first time you take it.
16. **Click the Retake button** so you are sent back to the beginning of the quiz.
17. Now **quit the lesson** and make sure the LMS shows your status as either failed or incomplete. Make a note as to how the LMS records the result.
18. Log back in with another browser (Firefox or Internet Explorer.)
19. Restart the lesson. You should return to the beginning of the quiz. This time, ***pass the quiz***. (Answer keys are available - see the document "*e-Learning Pre Publishing Checklist*").
20. After you see your score, click Continue and then you'll be prompted to close the browser window. Do so. The LMS should show your status as Passed or Complete. Please make a note of the result.
21. At this point you are finished with the test. Log off of Learning Center and close your browser.

<u>Documenting the testing</u>

1. For each test, note the computer (PC, Mac), the OS and the browser you used.
2. Did the lesson launch properly - was the screen size OK, did it take a long time, did you get a launch error message?
3. Did Closed Captions work?
4. When you abandoned the lesson, did it show a status of Incomplete?

5. When you re-launched, did it launch properly and did you return to the point at which you left off? (Bookmarking)
6. When you finished the quiz and exited the lesson did it report the proper completion status?
7. You can use the form on the last page to record your findings.

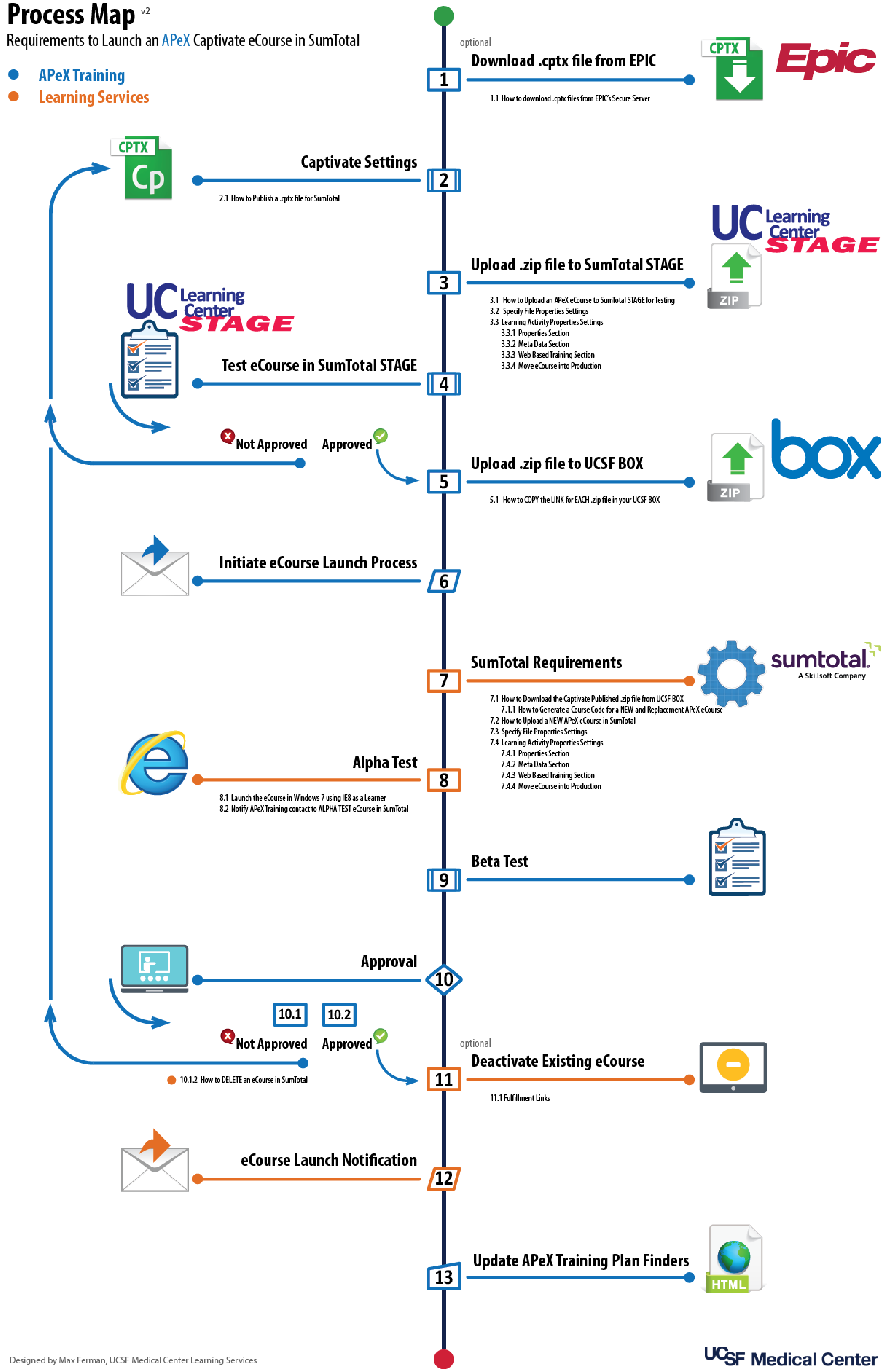
<u>Errors in Content</u> - This testing is intended to check performance, but if you catch content errors, they might have to be fixed. This would depend on the severity of the error – if it's missing punctuation in a closed caption it might not be worth the effort. But if it's missing Closed Captions or there are spelling errors on the slides – that would have to be fixed in the Captivate file and republished. Use your own judgment and seek the advice of the Principal Trainer and SME if necessary.

Test results form

Computer used?	PC______________ Mac______________
OS	Win Ver ______ OSX Ver___________
Browser Version	Windows IE____ Firefox____ Chrome_____ Mac Safari______ Firefox_________
Launch Properly?	Yes______ No ______ Launch Issues (if any) _____________________
Abandon lesson Status Incomplete?	Yes_____ No______
Relaunch Properly?	Yes______ No ______ Launch Issues (if any) _____________________
Return to where you left off?	Yes_____ No______
Status upon completion	Passed/Complete ________ Failed/Incomplete _______ Did this accurately reflect what you did? __________________
Comments	

Process Map v2

Requirements to Launch an APeX Captivate eCourse in SumTotal



Designed by Max Ferman, UCSF Medical Center Learning Services

UCSF Medical Center