

# CareTutor

Manager / Admin  
Instructions

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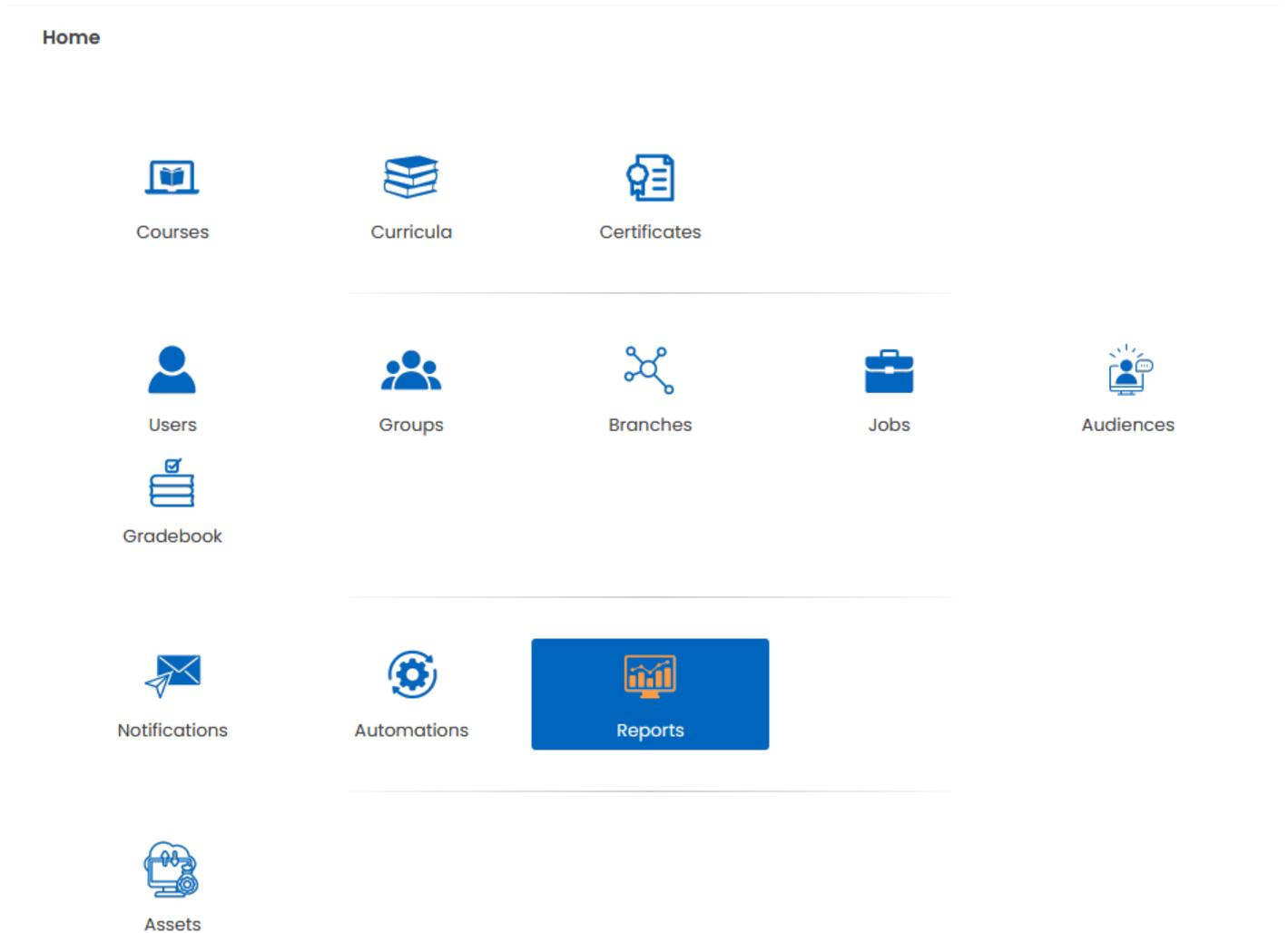
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# How to Create Custom reports

To create a custom report, log in as an administrator, and from your Administration dashboard, visit Reports.



From here, select the tab Custom **(1)**.

Home / Reports / **System**

SYSTEM USERS COURSES CURRICULA TESTS SURVEYS SCORM CERTIFICATES TIMELINE **CUSTOM** CONCURRENT USERS INFOGRAPHICS

EXPORT FILTER

You shall see a tabular list of all available custom reports, or if you do not have any custom reports set up yet the following screen.



## No custom report at the moment [Create your first report](#)

Clicking “Create your first report” to start the set up a new custom report will get to you the Custom Report Create page.

Initially, you need to provide a title for this report **(2)**. This field is mandatory. The next mandatory field that you need to provide is the Output information **(3)**. This field contains information that you might want to report on. Select the information to be produced for each user. Information related to progress will produce as many entries as the assignments of the courses per user.

This field contains information that you might want to report on. Select the information to be produced for each user. Information related to progress will produce as many entries as the course's assignments per user.

Home / Reports / Custom / Create

SYSTEM USERS COURSES CURRICULA TESTS SURVEYS SCORM CERTIFICATES TIMELINE **CUSTOM**

### General Information

Report's Title\*  **2**

Output Information\* 

Account Type	Branch	Name	Surname	Certification
Completion Date	Score			

### Rules

Progress (per Course)

Enrollment Date

Percentage

Status

Total Time **3**

Aggregate

Assigned Courses (Count)

Completed Courses (Count)

### Scheduled Export

Enabled\*

**SAVE**

Next, you can add rules **(4)** to better narrow down your report. Select the rules that will define what data is going to be included in your report. After selecting a rule, you can specify it further **(5)**.

Home / Reports / Custom / Create

SYSTEM USERS COURSES CURRICULA TESTS SURVEYS SCORM CERTIFICATES TIMELINE **CUSTOM**

### General Information

Report's Title\*

Output information\*

### Rules

**4** Refer only users who have job SALES. – 5 users found

Rule  [Remove](#)

**5** Job

Rule    [Remove](#)

- Select a rule ..
- Are certified for course
- Are enrolled to course
- Are not certified for course
- Are not enrolled to course
- Belongs to audience
- Belongs to branch
- Belongs to group

### Scheduled Export

Enabled\*

You can add more than one rule, which you can later remove if you do not need it anymore, and while adding new rules you can define the relation this new rule has to the previous one **(6)** (meaning a logical relation of AND or OR).

Course, Curriculum, and Certification rules include a date field **(7)**. You can specify a date range **(8)** in which the learner has completed a course/curriculum or was awarded a certificate, or you can specify the number of days, weeks, or months **(9)** relative to today's date.

### General Information

Report's Title\*

Output Information\*

### Rules

Refer only users who have job SALES and have completed course . - 0 users found

Rule  Remove

Job

Rule  AND OR Remove

Course

Date  7

Date range  8

ADD RULE

### General Information

Report's Title\*

Output Information\*

### Rules

Please wait, loading ..

Rule  Remove

Job

Rule  AND OR Remove

Course

Date  9

Last X  days weeks months

ADD RULE

Finally, you can select whether you want this report to be executed periodically or not and set up a schedule for it.

To set up a schedule for the report you will need first to enable the Scheduled report option **(10)** and then define when the report is going to run and what is the interval for your schedule. You can specify a list of custom recipients for the scheduled report by email.

Rule: Have job Remove

Job: SALES

---

Rule: Have completed course AND OR Remove

Course: Leave empty to include all ..

Date: Relative Date

Last X: Enter number of days/weeks/months days weeks months

ADD RULE

Please wait, loading ..

### Scheduled Export

Enabled\* Yes 10

Send On: 20/06/2023 11:45 UTC +03:00

Repeat every: 24 hours days weeks months

Recipients: admin@asdasd.com

Export as CSV

Required fields are marked with an asterisk (\*).

SAVE

When you are done, click save and you will be presented with the list of users that comply with the rules you have set up and export them to Excel.

# Example 1: All Course Completions

Home / Reports / Custom / Completed Courses

SYSTEM USERS COURSES CURRICULA LEARNING PATHS TESTS SURVEYS SCORM CERTIFICATES TIMELINE **CUSTOM** CONCURRENT USERS INFOGRAPHICS

VIEW RESULTS

## General Information

Report's Title\* All Course Completions

Output Information\*  
Branch (full path) \* Email Address \*  
Formatted Name \* Certification Date \*  
Score \* Status \*

## Rules

Refer only users who have status Completed in **any** course **and** belongs to branch UeL Clients / Angel Care

Rule Have status in course Remove

User Course Status Completed \*

Course Leave empty to include all ..

Rule Belong to branch AND OR Remove

Branch UeL Clients / Angel Care \*  Include subbranches

ADD RULE

## Scheduled Export

Enabled\* No

Export as CSV

Required fields are marked with an asterisk (\*).

SAVE

Note: Branch that this applies to is important, if you want to select your whole organisation then leave this field blank. Additionally remember to tick "Include subbranches" if you want to include all users in the organisation / location / department etc.

## Example 2: Certificates expiring within the next 3 months

SYSTEM USERS COURSES CURRICULA LEARNING PATHS TESTS SURVEYS SCORM CERTIFICATES TIMELINE **CUSTOM** CONCURRENT USERS INFOGRAPHICS

VIEW RESULTS

### General Information

**Report's Title\***

**Output Information\***

- Account Type \* Active \*
- Branch (full path) \* Email Address \*
- Formatted Name \* Gamification Level \*
- Last Login \* Login Name \* Name \*
- Surname \* Groups \*
- Certification Expiration Date \*

### Rules

Refer only users who have expiring course and curriculum certificates for the **next 1 month** **and** belongs to branch (including sub

**Rule**  [Remove](#)

**Time Period**

**Rule**    [Remove](#)

**Branch**   Include subbranches

ADD RULE

### Scheduled Export

**Enabled\***

**Send On**   UTC +00:00

**Repeat every**

**Recipients**

Export as CSV

Required fields are marked with an asterisk (\*).

Note: This example includes enabled "Schedule export". This can be set to automatically generate and send the report to a specified Recipients email. This report can be scheduled for a recurring period of time (e.g. Repeat every 1 day).

## Example 3: Users who haven't logged in within the past 3 months

SYSTEM USERS COURSES CURRICULA LEARNING PATHS TESTS SURVEYS SCORM CERTIFICATES TIMELINE **CUSTOM** CONCURRENT USERS INFOGRAPHICS

[VIEW RESULTS](#)

### General Information

**Report's Title\***

**Output Information\***

Login Name *	Name *	Surname *
User Public id *	Email Address *	
Account Type *	Active *	Archived *
Branch *	Branch (full path) *	
Formatted Name *	Gamification Level *	
Gamification Points *		

### Rules

Refer only users who have **not** logged in for the **past 3 months** **and** belongs to branch . — 3006 users found

**Rule**  [Remove](#)

**Time Period**

**Rule**    [Remove](#)

**Branch**   Include subbranches

### Scheduled Export

**Enabled\***

Export as CSV

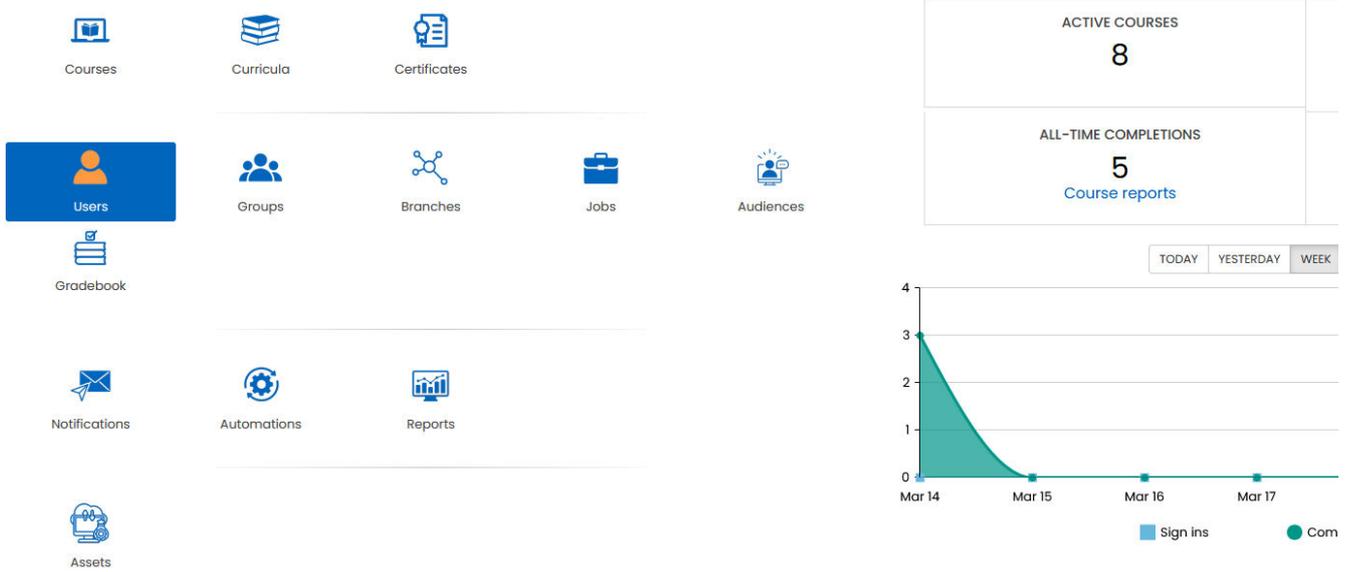
Required fields are marked with an asterisk (\*).

Note: If you wish to look at this within a specific branch, this will be included as additional rule (as shown above), with the particular branch selected, along with the option to included sub-branches.

# How to Reset a Course for a User

1. From the main Client Admin dashboard go to users

Home



2. Search for the user concerned using the filter text bar

Home / Users

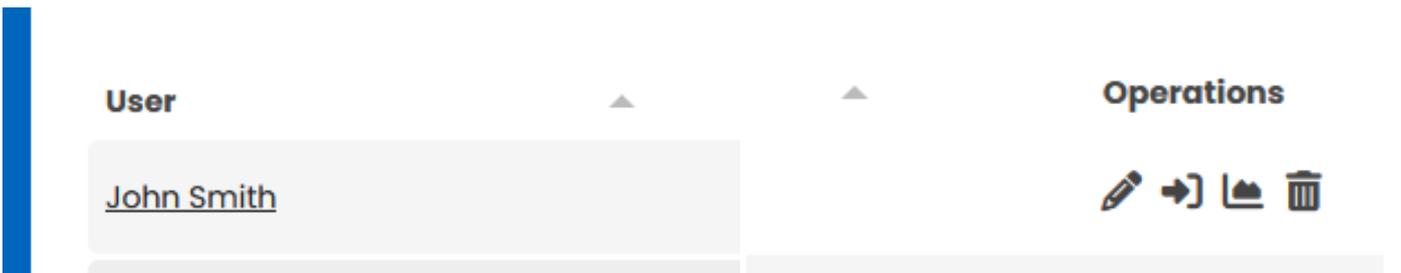
[ADD USER](#)

Filter

User	User Type	Branch Name	Registration date	Last login	Active	Operations
John Smith	Learner	Vitality Care	08/09/2024 19:19	22/11/2024 13:26	<input checked="" type="checkbox"/>	<a href="#">Edit</a> <a href="#">Share</a> <a href="#">Delete</a>
Terry Larsen	Client Admin	Vitality Care	22/08/2024 19:17	-	<input type="checkbox"/>	<a href="#">Edit</a> <a href="#">Share</a>
Jenny Weaver	Learner	Vitality Care	22/08/2024 19:17	12/03/2025 17:59	<input checked="" type="checkbox"/>	<a href="#">Edit</a> <a href="#">Share</a> <a href="#">Delete</a>

Rows: 500 | First | Previous | 1 | Next | Last | Showing 1-3 of 3 rows

3. Click on the name of the user concerned OR click the edit (pencil) on the right-hand side



The users account profile will now appear

Avatar



First name\*

John

Last name\*

Smith

4. Go to the Courses tab

The courses that user has been enrolled in will show (example below)

Filter



Name	Registration ...	Completion d...	Status	Score	Progress	Enrollment	Enrolled from Learning Path	Operations	Select
Core Home Health and Safety	11/09/2024 03:00	12/09/2024 18:26	Completed	82%	100%	<input checked="" type="checkbox"/>	-		
Dementia Care 2: Person Centred Dei	11/09/2024 03:00	12/09/2024 18:26	Completed	82%	100%	<input checked="" type="checkbox"/>	-		
Dementia Care 1: Understanding Dem	11/09/2023 03:00	12/10/2023 18:26	Completed	82%	100%	<input checked="" type="checkbox"/>	-		
Duty of Candour	11/09/2023 03:00	12/10/2023 18:26	Completed	82%	100%	<input checked="" type="checkbox"/>	-		
Death, Dying and Bereavement	11/09/2023 03:00	12/10/2023 18:26	Completed	82%	100%	<input checked="" type="checkbox"/>	-		
Caring for People with Epilepsy	11/09/2023 03:00	12/10/2023 18:26	Completed	90%	100%	<input checked="" type="checkbox"/>	-		
Dysphagia Awareness	11/09/2023 03:00	12/10/2023 18:26	Completed	90%	33.33%	<input checked="" type="checkbox"/>	-		
Develop as a Worker	-	-	-	-	-	<input type="checkbox"/>	-		

5. Choose the course you want to reset and click the button for Enrolment:

**Progress** ▼

**Enrolment** ▲

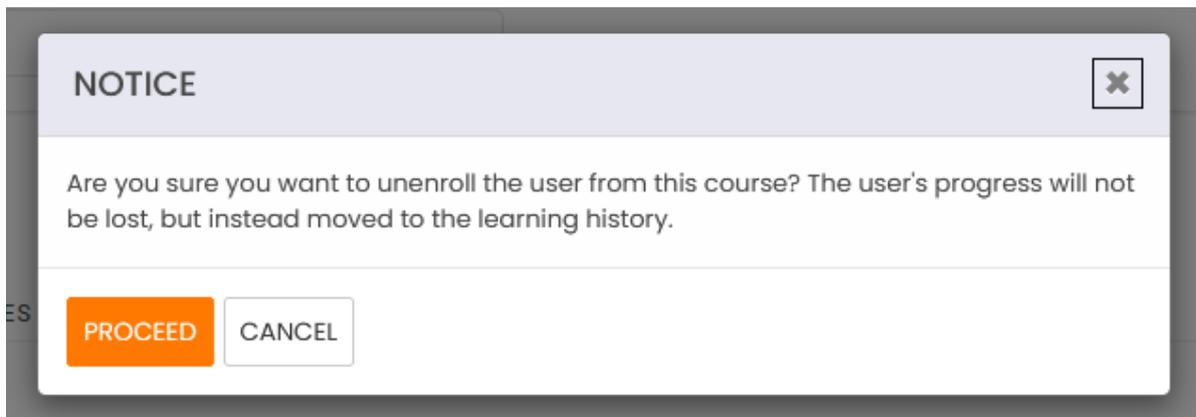
**Enrolled...** ▲

100%



-

6. Click Proceed for pop-up that appears



The course information for that user will be removed: Registration date, Completion date, Status, Score, Progress, and Enrolment

	Care Home Health and Safety	-	-	-	-	-	-	<input type="checkbox"/>
---	-----------------------------	---	---	---	---	---	---	--------------------------

7. Finally, click the Enrolment button to re-enrol the user into the course



**Progress**



**Enrolment**



**Enroll...**



**Operc**

-



-

The user's course information will change to only show the new registration date (today), and status - Not Started. With no completion date, score, or progress.

Name	Registration ...	Completion d...	Status	Score	Progress	Enrollment
 Care Home Health and Safety	21/03/2025 12:59	-	Not started	-	-	<input checked="" type="checkbox"/>

The user's dashboard will now show the course as registered and requiring completion (see below)

**Courses**   Curricula   Learning Paths



Registered

Social Care

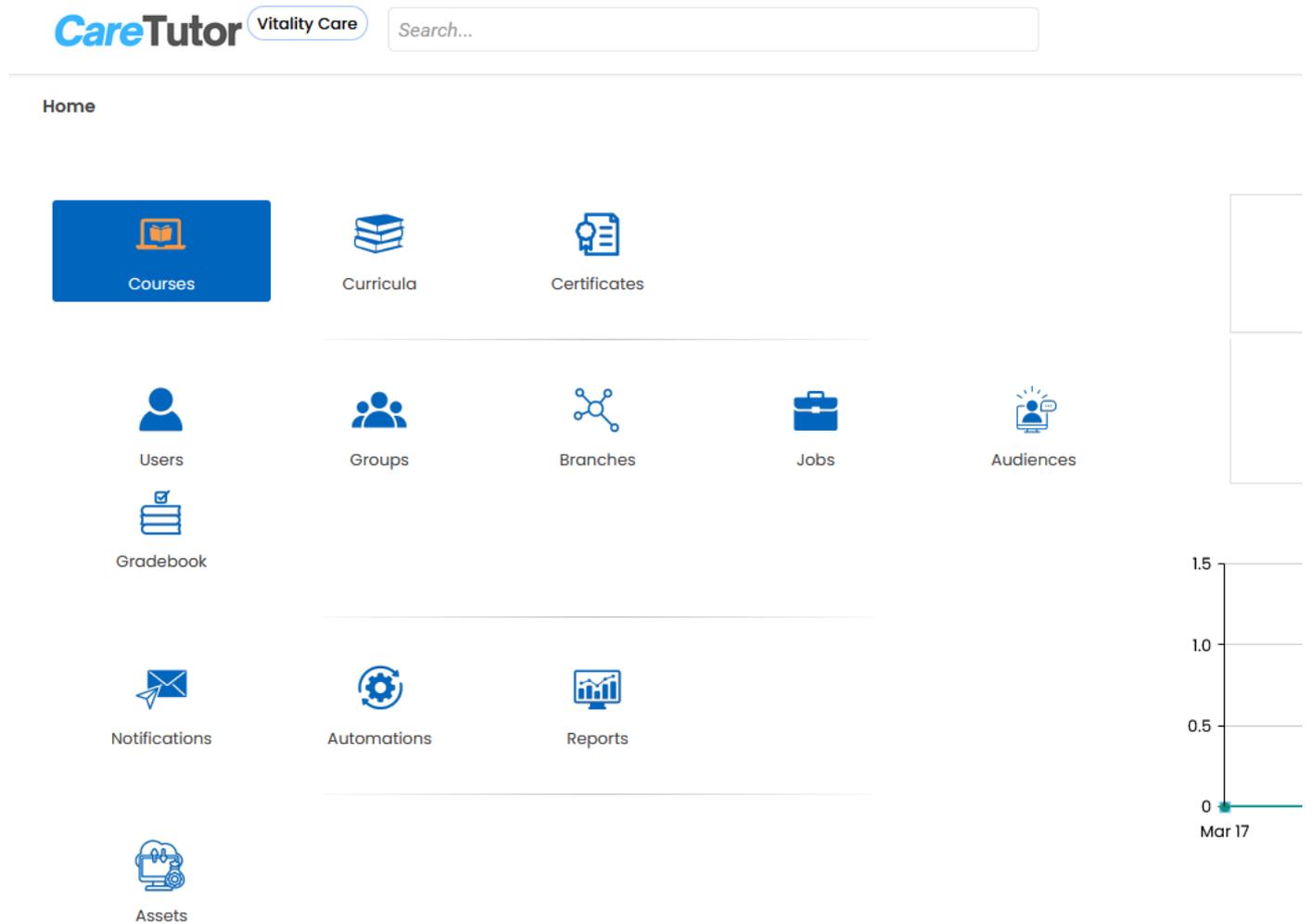
Care Home Health and Safety

0%



# How to Bulk Edit Course Completions for Users

From the Homepage dashboard go to > Courses



Then select the course:

Name	Last update	Participation	Active	Operations
 Develop as a Worker 1 Year	20/03/2025 19:08	0	<input type="checkbox"/>	 
 Care Home Health and Safety 1 Year	20/03/2025 16:19	1	<input type="checkbox"/>	 
 Caring for People with Epilepsy 1 Year	19/03/2025 17:48	1	<input type="checkbox"/>	 
 Dysphagia Awareness 1 Year	14/03/2025 16:33	1	<input type="checkbox"/>	 
 Duty of Candour 1 Year	14/03/2025 16:32	1	<input type="checkbox"/>	 

Go to Users:

- [DASHBOARD](#)
- [PROPERTIES](#)
- [USERS](#)
- [REPORTS](#)
- [BRANCHES](#)
- [SKILLS](#)
- [JOBS](#)
- [COURSE ANNOUNCEMENTS](#)



## Care Home Health and Safety

1 Year

Those course explains all key aspects of care home health and safety.

Watch through each video chapter to understand the key aspects of care home health and safety.

Select all the users who have completed this course from the selection:

▲ **Enrolle...** ▲ **Operations** **Select**

-     

Click on the "With Selected" tab that appears:

WITH SELECTED...



Operations

Select



This will open-up a pop up which allows you to change the status and progress of the course for the selected learners:

SET STATUS FOR SELECTED USERS

**Status**

**Registration date**  Format: DD/MM/YYYY HH:mm

**Completion date**  Format: DD/MM/YYYY HH:mm

**Score**

**Progress**

**Certificate**

**Extend for (days)**

SUBMIT

Finally, change Status to "Completed", and click "Submit":

<b>Status</b>	<input type="text" value="Completed"/>	
<b>Registration date</b>	<input type="text" value="Not started"/> <input type="text" value="In progress"/> <input checked="" type="text" value="Completed"/> ←	Format: DD/MM/YY
<b>Completion date</b>	<input type="text" value="Failed"/>	Format: DD/MM/YY
<b>Score</b>	<input type="text" value="Leave unchanged"/>	
<b>Progress</b>	<input type="text" value="Leave unchanged"/>	
<b>Certificate</b>	<input type="text" value="Leave unchanged"/>	
<b>Extend for (days)</b>	<input type="text" value="Set to 0 in order to remove the expiration."/>	
	<input type="button" value="SUBMIT"/> ←	

# How to Create and Edit a Curricular

## Adding a Curriculum

To add a new curriculum, follow the steps below:

### 1. Sign in as a Client Admin and go to **“Curricula” (1)**

The dashboard shows a sidebar with navigation options: Courses, **Curricula** (highlighted with a red circle and '1'), Certificates, Users, Groups, Branches, Jobs, Audiences, Gradebook, Notifications, Automations, Reports, and Assets. The main content area features four summary cards: ACTIVE COURSES (8), ACTIVE USERS (3, with an 'Add user' link), ALL-TIME COMPLETIONS (5, with a 'Course reports' link), and SIGN INS (39, with a 'Users reports' link). Below these cards is a chart showing 'Sign ins' (blue bars) and 'Completions' (green area) from Mar 13 to Mar 20. The chart shows a peak in completions on Mar 14.

### 2. Select **“Add Curriculum (2)**.

The 'Curricula' page shows an 'ADD CURRICULUM' button highlighted with a red circle and '2'. Below the button is a table with the following data:

Name	Created on	Participation	Active	Operations
Care Home Care Certificate	27/08/2024	4	<input checked="" type="checkbox"/>	
Home Care Care Certificate	18/09/2024	17	<input checked="" type="checkbox"/>	

### 3. Add a Curriculum image **(3)**, fill in the name **(4)** of the curriculum, select the category **(5)** (based on the currently existing categories, optional) that your curriculum belongs to, and add a description **(6)**

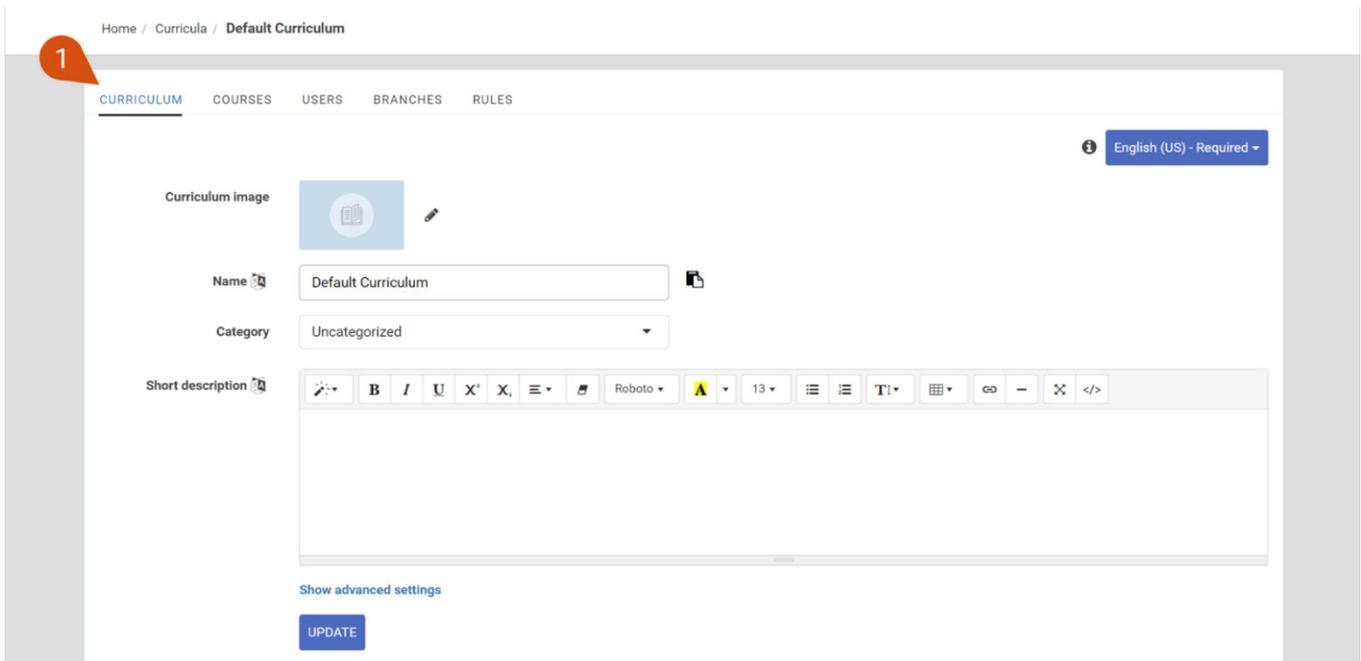
You will find additional options **(7)** such as:

- **Active:** Check this option if you want your curriculum to be active and available to your users or not.
- **Automatically assign to new users:** Check this option if you want new users who are added to the system (or into the branch that the curriculum is assigned to) to also be enrolled in the curriculum automatically.
- **Show on catalogue:** Check this option if you prefer the curriculum to appear in the course catalogue.
- **Show in the main catalogue:** Check this option if you prefer the curriculum to appear in the main course catalogue.
- **Base price:** Assign the price to this curriculum (**recommended to leave blank**)
- **Certification:** Select the certification that this curriculum awards.

Lastly, when finished click "Add"

### Editing a Curriculum

When editing a curriculum, you can edit all the settings we have described above under the **Curriculum (1)** tab.



You also need to select the courses that are going to be a part of this curriculum, along with whether each course is mandatory or optional for the curriculum. You can do so by going to the **Courses (2)** tab and click **“No”**, changing it to **“Yes” (3)**.

Home / Curricula / Default Curriculum

1 CURRICULUM COURSES USERS BRANCHES RULES

SET ORDER

Name ^	Course type	Optional	Assigned
*Micro Course Update - Caring for People with Autism	eLearning	<input type="radio"/>	NO <span>3</span>
Care Home Health and Safety	eLearning	<input type="radio"/>	YES
Dementia Care 1: Understanding Dementia	eLearning	<input type="radio"/>	YES
Moving and Assisting Practical	eLearning	<input type="radio"/>	YES
Principles of Person Centred Care	eLearning	<input type="radio"/>	YES

Moreover, you can manually manage the users of this curriculum by enrolling or removing Learners from the **Users (4)** list. To do so, click **“Enrol Now” (5)**.

Home / Curricula / Default Curriculum

4 CURRICULUM COURSES USERS BRANCHES RULES

User	Registration date	Completion date	Status	Score	Enrollment v	Operations
G.learner	19/04/2023 17:41	-	Not started		ENROLLED	
J.JMalkovic	24/03/2023 15:24	-	Not started		ENROLLED	
G.instructor <span>Instructor</span>		-		-	ENROLL NOW	
g.gtroul		-			ENROLL NOW <span>5</span>	

Change to the **“Branches” (6)** tab to assign this curriculum to a specific branch, and click **“No”**, changing it to **“Yes” (7)**.

Home / Curricula / Default Curriculum

6

CURRICULUM COURSES USERS **BRANCHES** RULES

Branch	Assigned
Cerberus	YES
Alliance	YES
TestBranchAlliance2	YES
TestBranchAlliance3	YES
Sub_Cerberus	YES
France	NO
Paris	NO
Arsakeio	NO
Certifications	NO
Europe	NO

7

Filter

Rows  Showing  out of 32

Finally, specify the Curriculum Rules by changing to the **“Rules” (8)** tab. On the Rules page, there are two sections: **“Scoring rules”** and **“Completion rules”**.

Home / Curricula / Default Curriculum

8

CURRICULUM COURSES USERS BRANCHES **RULES**

Scoring rules

Set the curriculum score equal to  9

Completed curriculum change score  10

Change the Curriculum scoring rule by expanding the **“Set the curriculum score equal to” (9)** and select one of the available curriculum scoring rules:

- The average score of all completed courses.
- The average score of all mandatory courses.
- The average score of specific courses.

Select if you want the curriculum score to change if the Learner completes the courses in the curriculum with a new score **(10)**. NOTE: This is advised to change to **Better score only**

Under Completion rule, you will find a list of all the conditions that have already been set (if any) to complete this curriculum. To set a new condition, click the **“Add Condition” (11)** button and set a new condition and its relation to other conditions.

Home / Curricula / Default Curriculum

CURRICULUM COURSES USERS BRANCHES RULES

Scoring rules

Set the curriculum score equal to

Completed curriculum change score

Completion rules ⓘ

At least one rule must be defined for a curriculum, in order to be able to be completed by learners.

**11**

Type ^	Relation to others	Courses	Operations
Completed all mandatory courses	AND	-	<input type="button" value="edit"/> <input type="button" value="delete"/>

Filter

Showing 1-1 out of 1

Pick one of the following available completion conditions **(12)**. Your options are:

- Completed all mandatory courses: Learners will need to complete all mandatory courses in the curriculum.
- Completed specific courses: Select the prerequisite course from the drop-down menu.

The **“Relation with other conditions” (13)** drop-down menu offers two options: **“And”** and **“Or”**. Conditions that are set to **“And”** must all be met by the user for the course to be considered **“completed”**. On the other hand, out of all the conditions that are set to **“Or”**, only one must be met by the user for the course to be considered **“completed”**. Select **“Add” (14)** when ready.

ADD CONDITION

Condition  **12**

Courses

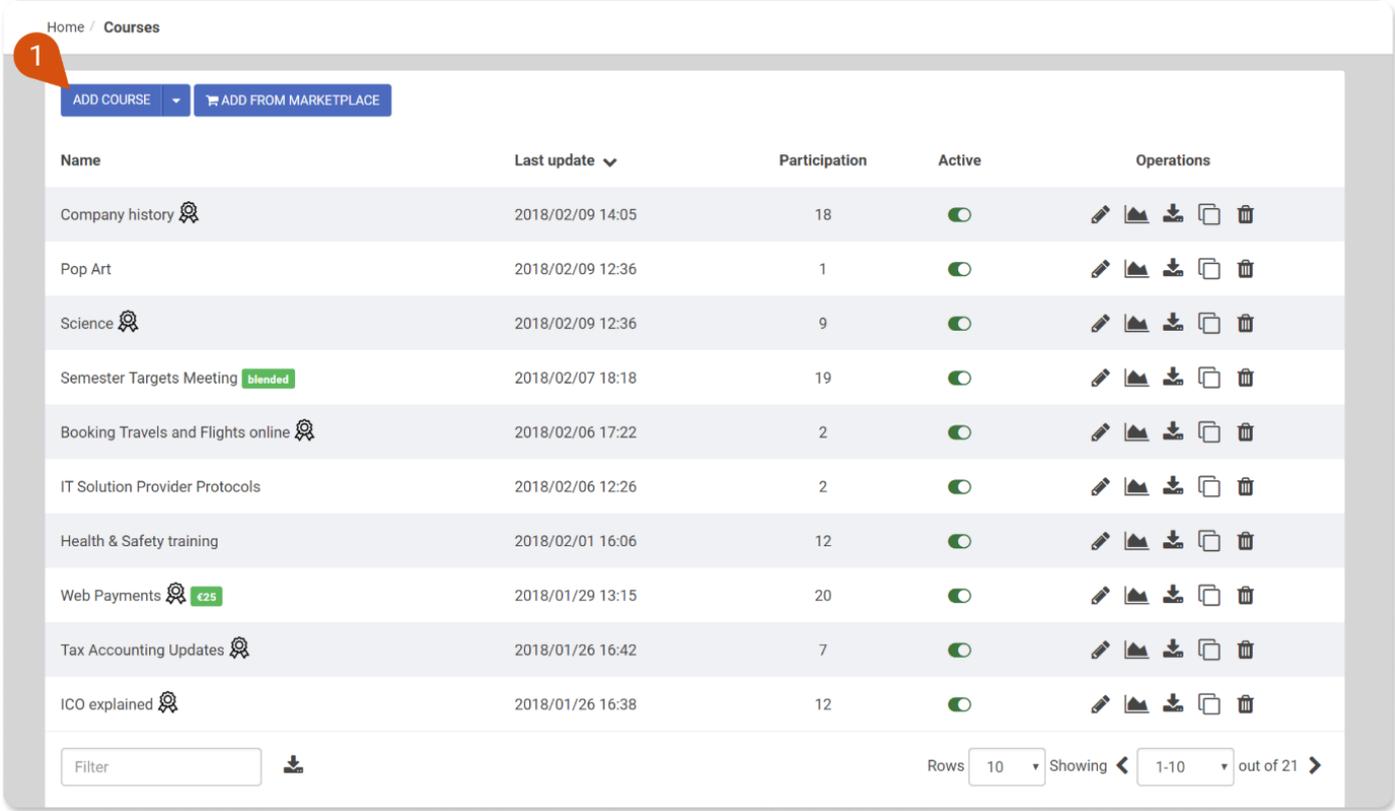
Relation with other conditions  **13**

**14**

# How to Add Courses and Add/Edit Course Content

## Adding a new course:

To add a new course, click “Add Course” **(1)** in the Courses section.



Home / Courses

**1** ADD COURSE ADD FROM MARKETPLACE

Name	Last update	Participation	Active	Operations
Company history	2018/02/09 14:05	18	ON	[Edit] [Chart] [Download] [Copy] [Delete]
Pop Art	2018/02/09 12:36	1	ON	[Edit] [Chart] [Download] [Copy] [Delete]
Science	2018/02/09 12:36	9	ON	[Edit] [Chart] [Download] [Copy] [Delete]
Semester Targets Meeting <b>blended</b>	2018/02/07 18:18	19	ON	[Edit] [Chart] [Download] [Copy] [Delete]
Booking Travels and Flights online	2018/02/06 17:22	2	ON	[Edit] [Chart] [Download] [Copy] [Delete]
IT Solution Provider Protocols	2018/02/06 12:26	2	ON	[Edit] [Chart] [Download] [Copy] [Delete]
Health & Safety training	2018/02/01 16:06	12	ON	[Edit] [Chart] [Download] [Copy] [Delete]
Web Payments <b>€25</b>	2018/01/29 13:15	20	ON	[Edit] [Chart] [Download] [Copy] [Delete]
Tax Accounting Updates	2018/01/26 16:42	7	ON	[Edit] [Chart] [Download] [Copy] [Delete]
ICO explained	2018/01/26 16:38	12	ON	[Edit] [Chart] [Download] [Copy] [Delete]

Filter [Download] Rows 10 Showing 1-10 out of 21

Another way to add a new course is to import an already exported one. Click the downward arrow next to the “Add course” button **(2)**.

Home / Courses

ADD COURSE ADD FROM MARKETPLACE

Import Course

Name	Last update	Participation	Active	Operations
Company history	2018/02/09 14:05	18	ON	[Edit] [Chart] [Download] [Copy] [Trash]
Pop Art	2018/02/09 12:36	1	ON	[Edit] [Chart] [Download] [Copy] [Trash]
Science	2018/02/09 12:36	9	ON	[Edit] [Chart] [Download] [Copy] [Trash]
Semester Targets Meeting <span>blended</span>	2018/02/07 18:18	19	ON	[Edit] [Chart] [Download] [Copy] [Trash]
Booking Travels and Flights online	2018/02/06 17:22	2	ON	[Edit] [Chart] [Download] [Copy] [Trash]
IT Solution Provider Protocols	2018/02/06 12:26	2	ON	[Edit] [Chart] [Download] [Copy] [Trash]
Health & Safety training	2018/02/01 16:06	12	ON	[Edit] [Chart] [Download] [Copy] [Trash]
Web Payments <span>€25</span>	2018/01/29 13:15	20	ON	[Edit] [Chart] [Download] [Copy] [Trash]
Tax Accounting Updates	2018/01/26 16:42	7	ON	[Edit] [Chart] [Download] [Copy] [Trash]

**Note:** When you import a blended learning course, the imported file will not include training sessions.

Once you've clicked to add a new course, you will be asked to fill out some essential information.

Home / Courses / Add course

Course image

3

4 Name\*

Category

5 Type

6 Short description 

[Rich text editor toolbar: Bold, Italic, Underline, Text color, Background color, Font size, Bulleted list, Numbered list, Indent, Outdent, Link, Unlink, Table, Table of contents, Source code]

7 [Show advanced settings](#)

ADD

The required fields are the Name (3) and the Category (4) of the course. The non-mandatory fields include course type (5) and a brief course description (6).

Click "Submit" to submit your course. In addition to these, there are several advanced options that you can see and configure by clicking on 'Show Advanced Settings' (7).

### Hide advanced settings

Course code	<input type="text" value="e.g. CSC101"/>
Tags	<input type="text" value="Select tags"/>
Language	<input type="text" value="English (US) [English (US)]"/>
Options	<input type="checkbox"/> Active <input checked="" type="checkbox"/> Enable discussions <input type="checkbox"/> Show on catalog <input checked="" type="checkbox"/> Show on main catalog <input checked="" type="checkbox"/> Assignment requires approval <input checked="" type="checkbox"/> Automatically assign to new users
Base price	<input type="text" value="e.g. 15.50"/>
Available for	<input type="text" value="days"/>
Upon expiration	<input type="text" value="Prevent access unless completed"/>
Available from	<input type="text" value="With respect to your timezone"/>
Available until	<input type="text" value="With respect to your timezone"/>
CEUs	<input type="text" value="e.g. 10"/>
Depends on	<input type="text" value="Select courses"/>
Certification	<input type="text" value="Select template"/>

Advanced settings include:

- **Course code:** a short alphanumeric code for easy reference (e.g., 'CS101')
- **Language:** to let the users know what language the course is in
- **Some extra options:** the course status (active or inactive), its visibility on the catalogues, and assignment options
- **Base price:** for paid courses
- **Available for:** to set for how many days an enrolled user has access to the course

- **Available from/until:** to set from when and/or until this course is available to enrolled users
- **CEUs:** to set how many continuing education units the course corresponds to
- **Depends on:** a rule to set if this course depends on other courses in the system
- **Certification:** awarded to users after completing the course

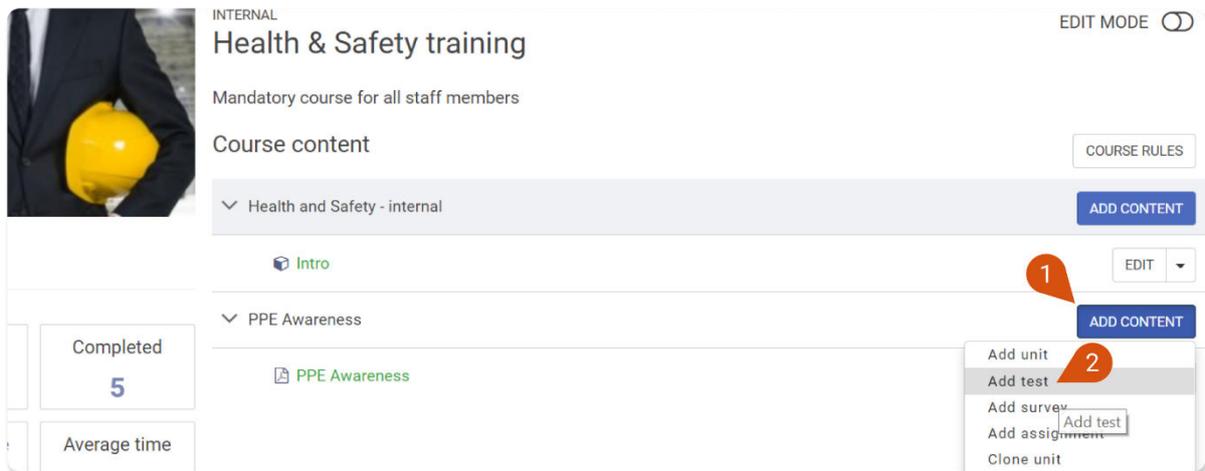
**Note:** You can also add custom fields when adding a Course, which you can create in the Extend Profile section.

**Note:** Course expiration is visible in your learners' calendars.

When done, click Add.

## Adding a Test to a Course

To add a test while you create a course, go to the "Dashboard" tab on the course's page and click on the "Add content" **(1)** button next to the lesson you want to contain the test. Then, from the drop-down list, pick the "Add test" **(2)** option.



**Note:** To add a test to an existing course, you have to sign in to your system either as a Client Admin or as an instructor, depending on which account was used to create the course. Only one account can maintain course ownership, along with the permission to add/edit tests in that course.

After signing in as the course's owner, go to the "Add test" page and start by typing a title **(3)** for the new test unit in the "Name\*" field (this step is required). Then, you can add a description for your test **(4)** and click on the "Show advanced settings" **(5)** link to further customize your test's function.

255 characters maximum

**Name\*** 3

**Description** 4

5 [Show advanced settings](#)

6 **SAVE AND SELECT QUESTIONS**

Once you are done, click on the "Save and Select questions" **(6)** button.

The new test is successfully added to your course and you are taken to the test unit's **(2)** "Questions" **(1)** tab. From here, you can:

- Add questions **(3)**: Select the type of question you want to add to your test
- Show questions from **(4)**: View and select, if suitable, existing questions from other lessons
- View test **(5)**: Preview your test.

2

TEST

QUESTIONS

1

ADD QUESTION ▾

SHOW QUESTIONS FROM ▾

VIEW TEST

3

4

5

Question

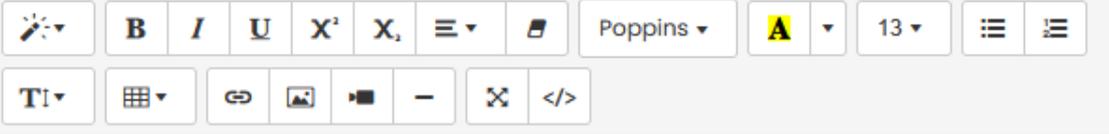


**Associated unit**

**Difficulty\***

**Seconds to complete**

**Explanation** 



**Associated skill**

Required fields are marked with an asterisk (\*).

[Save question](#)

Edit course unit contents

If you want to add a piece of text and/or message to learners, you can use

**1. Editor**

The default Editor **(1)** option you see when clicking to add a new unit:

Here you can type and edit the text in the text editor and also click the `</>` symbol **(2)** to use the Code view and edit HTML content:

*Note: You can change the default text-editor in System Settings > Integrations > Editors (tab)*

To see how to add icons and images to your text, read this article

## 2. H5P

- H5P libraries can be added to and used within the H5P editor
- H5P content can then be created within the portal interface
- H5P units created elsewhere can be uploaded as a unit and then edited within the H5P editor.
- Finally, all H5P units created or uploaded can be exported from Pathway platform courses.

## 3. URL

- Copy and Paste the URL link for the course content e.g. YouTube or Vimeo video

## 4. File

You can create a unit by uploading a file. Select “File” from the drop-down menu and then click Upload new (3).

You can as well drag and drop the files you want to add as units into the course dashboard section. If you drag and drop files, you can always change the unit names and completion methods by editing each unit afterwards.

Different file formats will result in different unit-types created:

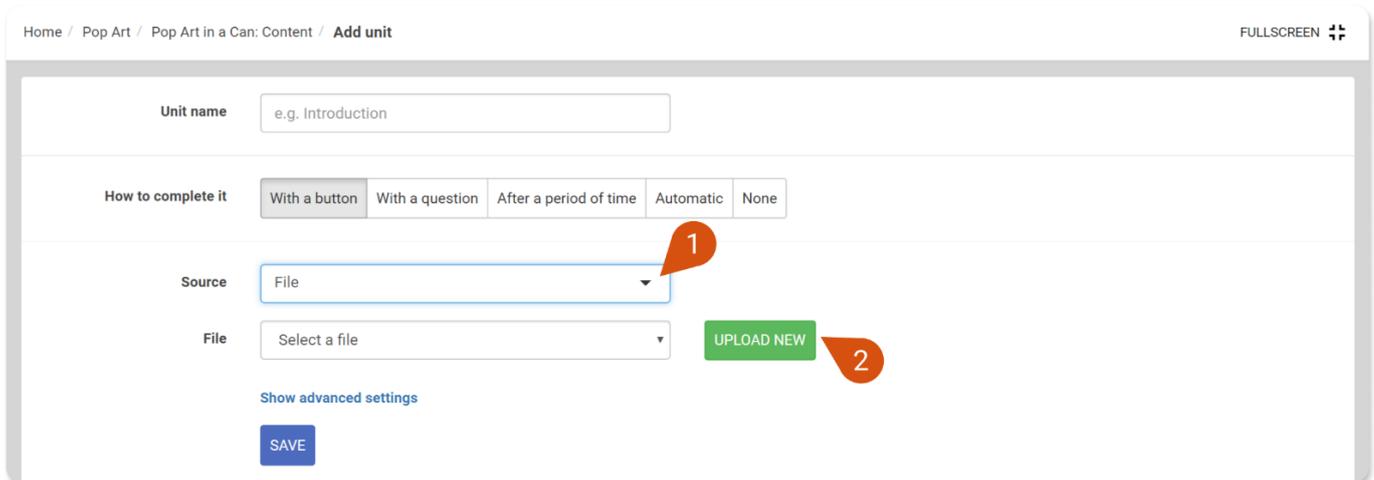
- Text files: they are shown on pages
- Video/Audio units: those have their own completion methods and options
- ZIP packages: when recognized as SCORM/xAPI and AICC, they will have their specific settings
- PDF files: This offers two specific options. You can either “hide the download button” or “hide the print button” from learners, shown by default at the top of the unit frame

Presentations: PowerPoint (.ppt) files can be converted to either videos or PDFs when the EncodeMagic conversion tool is enabled

Note: With EncodeMagic, you can also add watermarks to the uploaded videos.

## How to create a new Unit using a file

To create a unit using a file, log in either as an administrator or an instructor and go to your course's dashboard to add a new content unit.



The screenshot shows the 'Add unit' form with the following elements:

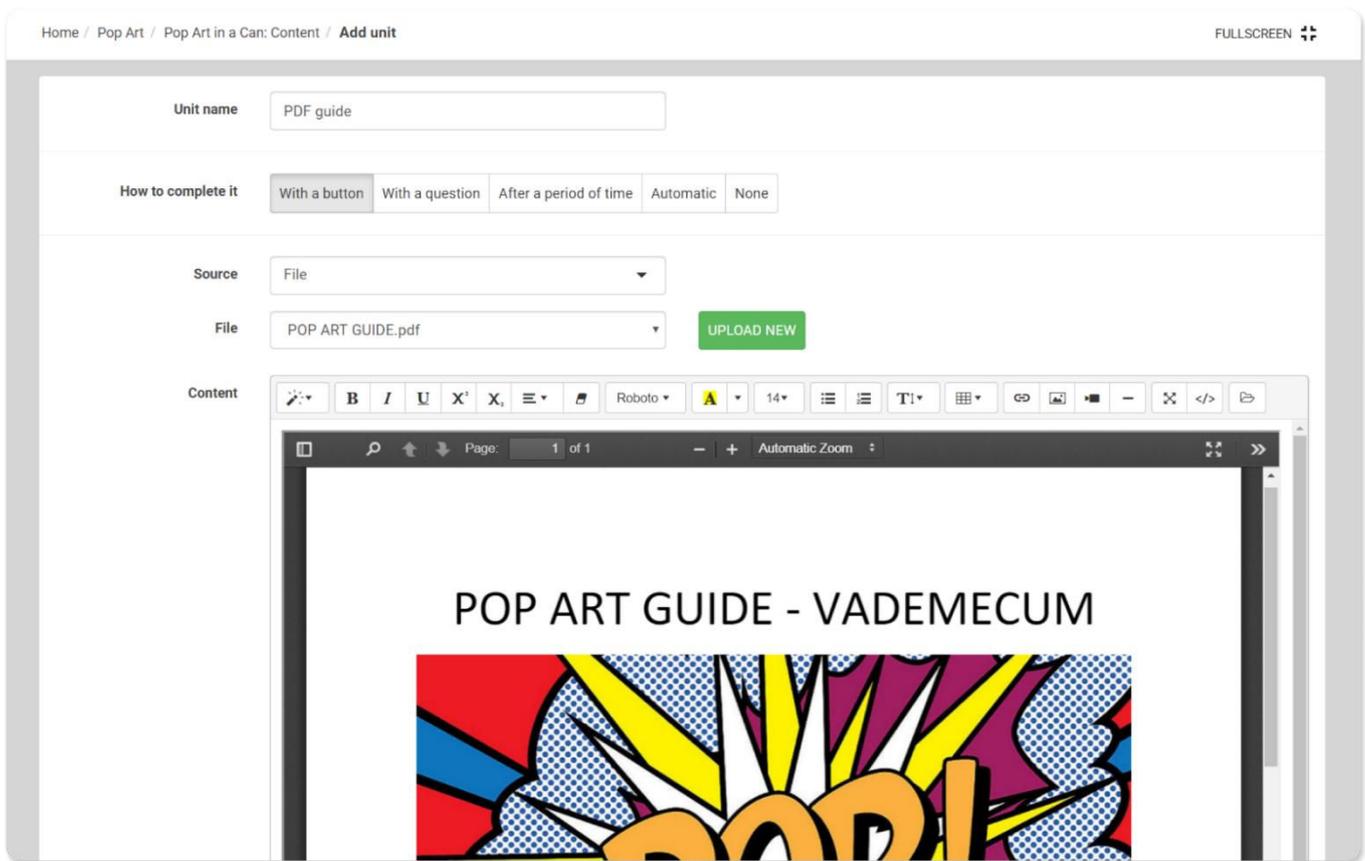
- Unit name: e.g. Introduction
- How to complete it: With a button, With a question, After a period of time, Automatic, None
- Source: File (highlighted with a red circle and the number 1)
- File: Select a file (dropdown menu)
- UPLOAD NEW (green button, highlighted with a red circle and the number 2)
- Show advanced settings (link)
- SAVE (blue button)

Click the source field, choose "File" from the drop-down menu **(1)**, and then click "Upload New" **(2)**.

If you have already uploaded the file you want to use on your lesson files, you will be able to find it in the drop-down menu after you click "Select a file."

Once you have selected or uploaded the file, the file's content will be injected into your unit's content. Please note that the file's name will replace the name of the unit by default.

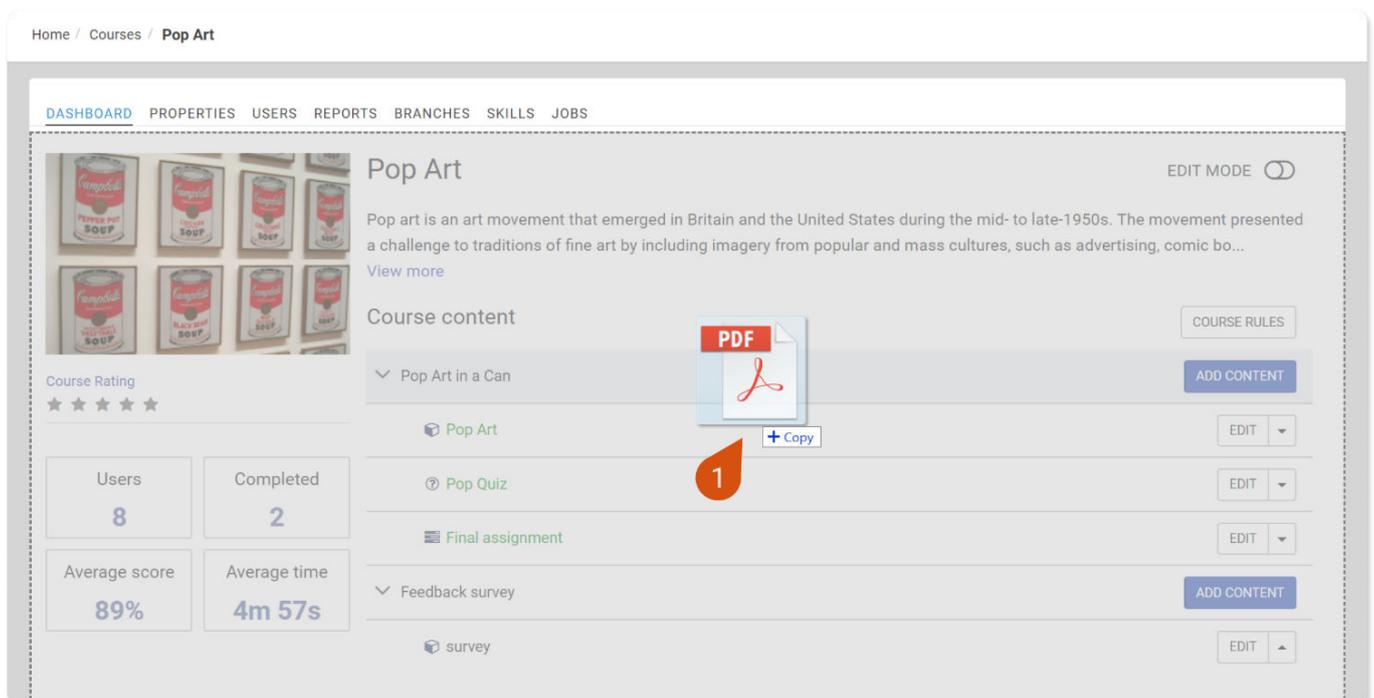
**Note:** For content such as SCORM/xAPI and AICC the default completion method is automatically set to 'None' as these content types have their own internal completion rules



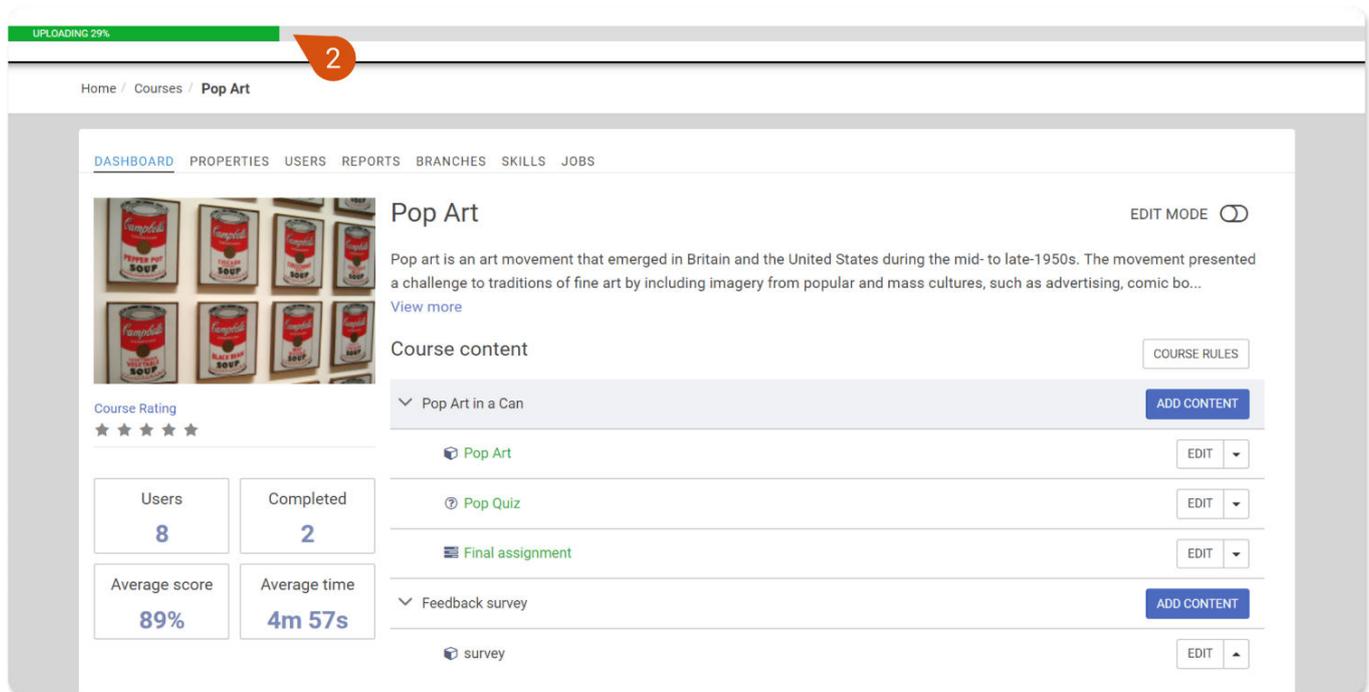
Based on the file type, learners will either see an embedded version of it or will need to click a link to open or download it.

## Drag and Drop

Another way to create a unit using a file is by simply dragging and dropping the file into the course's dashboard **(1)**:

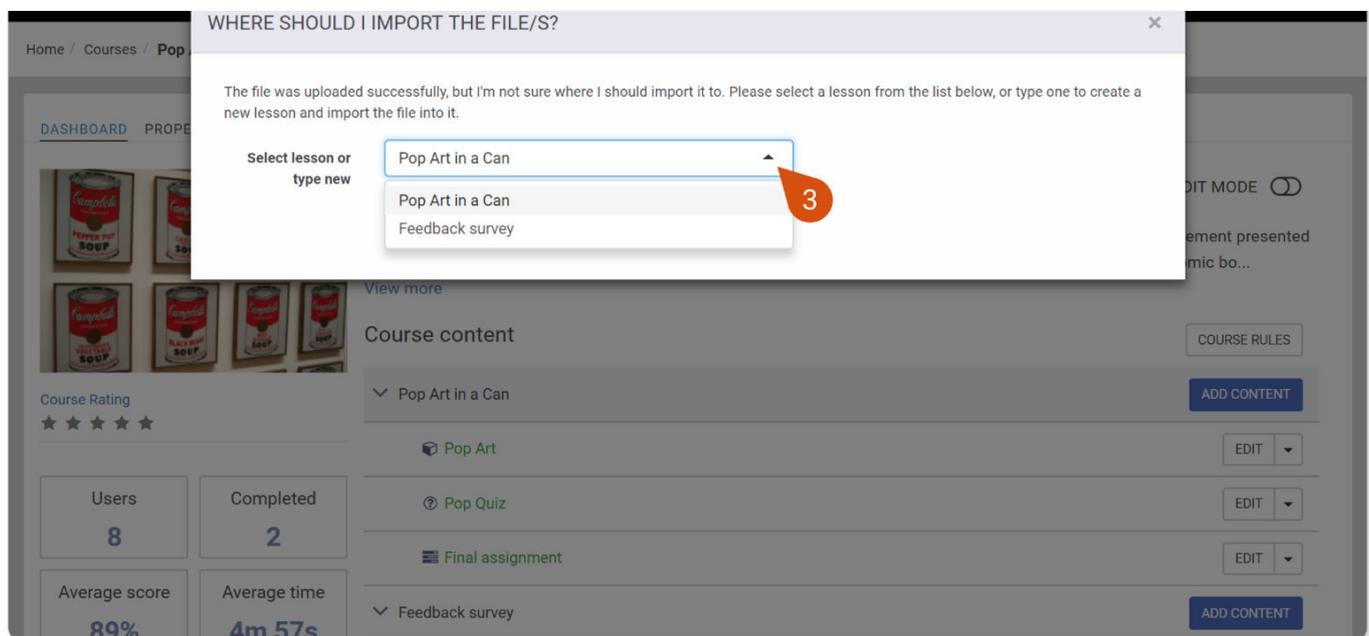


A file upload progress bar will appear at the top of the page **(2)**.



As soon as the upload is complete and if the course has only one Lesson library, a new unit will be added to your course's content.

If your course has more than one Lesson library, you will see a message asking you to choose the library you want the new file unit to go to **(3)**. You can even type the name of a new lesson to create it at this point.



**Note:** After a video unit has been uploaded, some extra options will pop up

You can choose "**After video ends**" **(4)** as a completion method, urging learners to watch the whole video before they move to the next unit

You can use .vtt files to add **a description and/or closed captions** **(5)**

**How to complete it**

With a button | After a period of time | Automatic | After video ends | None

**Source** File

**File** Zabriskie point opening scene.mp4 **UPLOAD NEW**

**Captions File (.vtt)** Select a file **UPLOAD NEW**

**Descriptions File (.vtt)** Select a file **UPLOAD NEW**

**Content**

Rich text editor toolbar: Bold, Italic, Underline, Text color, Background color, Bulleted list, Strikethrough, Font family (Roboto), Font size (14), and a menu icon.

## Lesson files

To view all files used to create units in each lesson, click **Add Content (1)** next to the lesson's name, and then click **Go to files (2)**.

INTERNAL

EDIT MODE

# Health & Safety

Mandatory course for all staff members

[View more](#)

## Course content

COURSE RULES

1 **ADD CONTENT**

- Add unit
- Add test
- Add survey
- Add assignment
- Clone unit
- 2 **Go to files**
- Go to tests
- Go to surveys

Health and Safety - internal

- Intro
- Video List
- PPE Awareness
- Links and Docs

Here, you will see a list of all files associated with the lesson, and you can perform the following actions for each of them:

- Use the **Shared (3)** toggle to share files with all users who have access to the lesson
- **Copy (4)** will copy the file's path location in your clipboard

- **Import (5)** as content will import it as a new unit
- Use **Preview (6)** to view the file's content
- Click **Download (7)** to export the file to your device
- Click **Delete (8)** to permanently remove this file from the lesson's contents

Home / Courses / Health & Safety / Files

ADD FILE OR DRAG AND DROP

Type	Name	Size	Modified	Shared	Operations
	Health & Safety Memorandum.docx	11.4 KB	28/02/2018 17:03	<input checked="" type="checkbox"/>	   
	API Documentation.pdf	377.75 KB	18/07/2019 10:40	<input type="checkbox"/>	   
	HealthSafetyWorkMay18.zip	2590.45 KB	17/05/2018 12:40	<input type="checkbox"/>	   

Filter   Showing 1-3 out of 3

**Note:** deleting a unit from the course dashboard will not remove the related file which remains available and can be found in the "Go to files" section. Also, when you export/import a lesson or course, all files available will be included.

# Training events / Face to Face (Blended) Learning

## How to set up Instructor Led Training events

Instructor Led Training (ILT) can be defined as the training process which takes place under the guidance of a specific individual, usually on a predefined date and location.

### Creating an ILT course

In order to create an ILT course, you can sign in as either an administrator or an instructor.

But first, some terminology

A training **Event** is an entity that represents a training that happens in the physical world.

A **Training Session** represents the actual training. A Training Event can include multiple Training Sessions. For example, if the same training takes place in New York and London, then you can set up one Training Event and two different Training Sessions. Users will then be able to select which location is suitable for them.

A **Lesson** represents a training that purely consists of e-learning content.

A **Course** is a collection of lessons and/or training events. The user can buy/enroll to the course

To create an ILT course, go to *Courses* > *add a course* to create a new course. Select "Blended learning" **(1)** from the "Type" drop-down list.

Home / Courses / Add course

Course image   

Name\*

Category

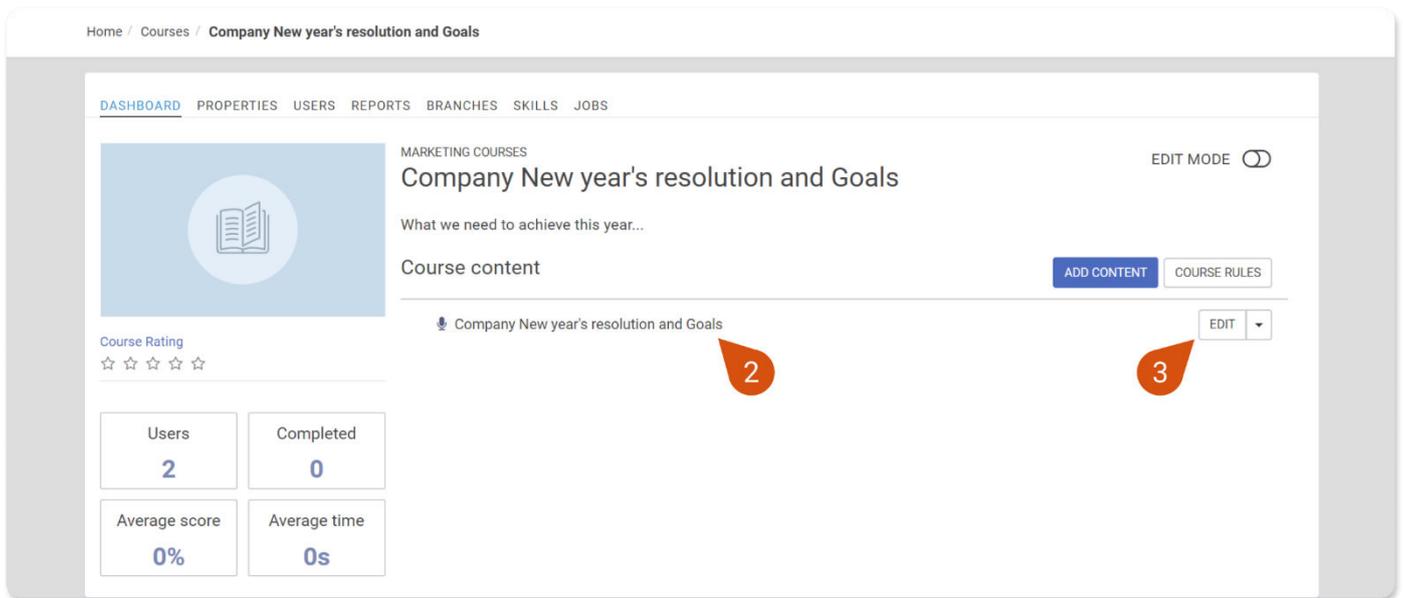
Type  Blended courses offer a wider range of options suitable for Instructor Led Training

Short description  **1**

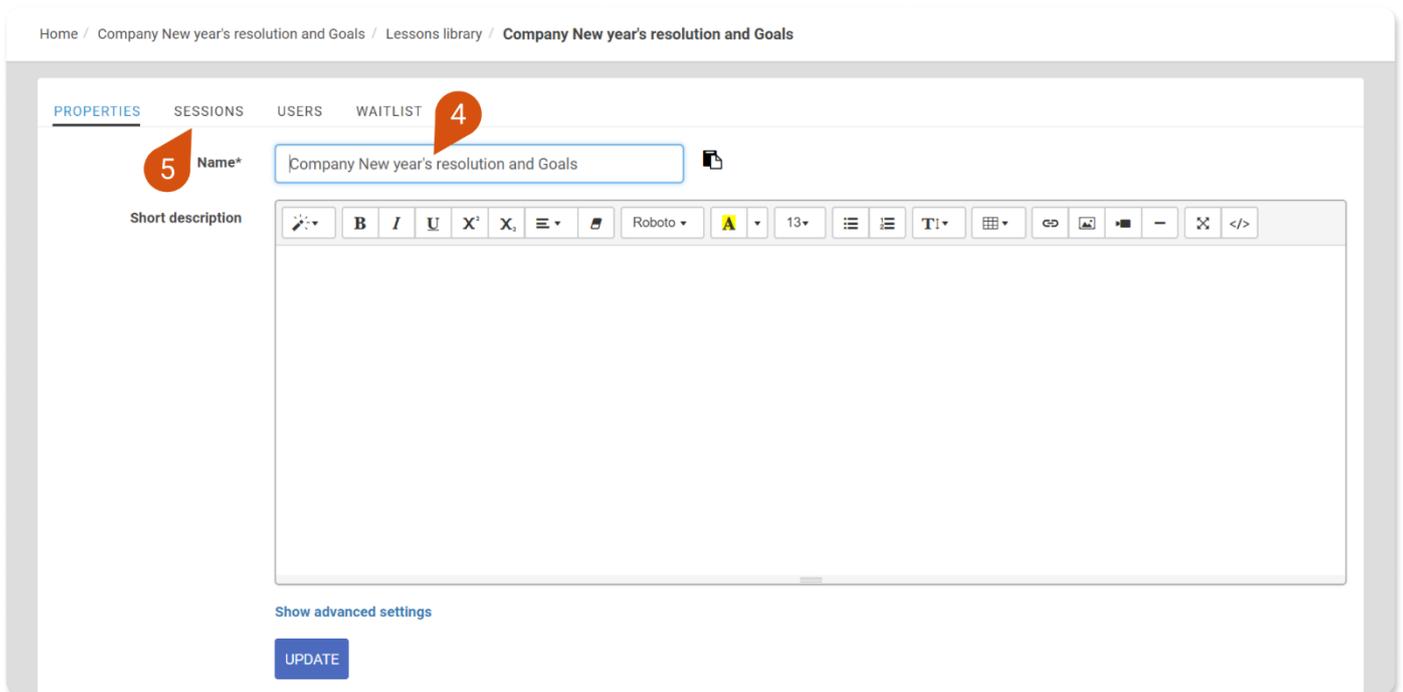
[Show advanced settings](#)

After creating the course, you will be directed to the course's dashboard tab and you will notice that a training event with the same name as the course, is automatically added **(2)**.

Clicking on the Edit button you can edit your first event **(3)**.



Through this page, you can edit the Event's title **(4)**, add a description and move to the Sessions tab in order to add new sessions to it **(5)**. So far, you have created a new blended learning course with one training event that has no sessions yet. The next step is to add training sessions.



Training sessions can be added through the course dashboard as well. Just click on the Content **(6)** button and select the first option, Add Training Session **(7)**.

Home / Courses / Company New year's resolution and Goals

DASHBOARD PROPERTIES USERS REPORTS BRANCHES SKILLS JOBS

MARKETING COURSES

## Company New year's resolution and Goals

What we need to achieve this year...

Course content

EDIT MODE

ADD CONTENT COURSE RULES

Company New year's resolution and Goals

Course Rating

☆☆☆☆☆

Users	Completed
2	0
Average score	Average time
0%	0s

7

6

ADD CONTENT

EDIT

- Add training session
- Add unit
- Add test
- Add survey
- Add assignment
- Clone unit
- Go to files
- Go to tests
- Go to surveys
- Go to assignments
- Go to lessons library
- Go to training sessions

In order to add a new session, you have to type its name, select the location where it will take place, specify the date and the duration.

TRAINING SESSION

Name\* e.g. Training webinar

Location\* London Building Meeting room A - (UTC+00:00) Europe/London

Your current timezone is (UTC+02:00) Europe/Athens

Date\* 2018/01/30 11:00

use range

Duration 3 hour minutes hours days

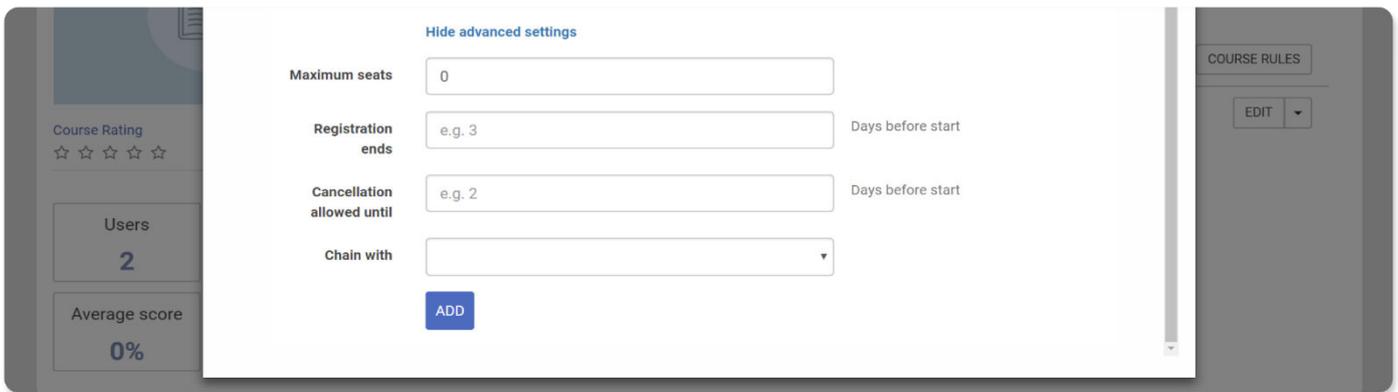
Show advanced settings

ADD

**Note:** If another session is being conducted in the same location at the same time, the system will prevent you from creating the session.

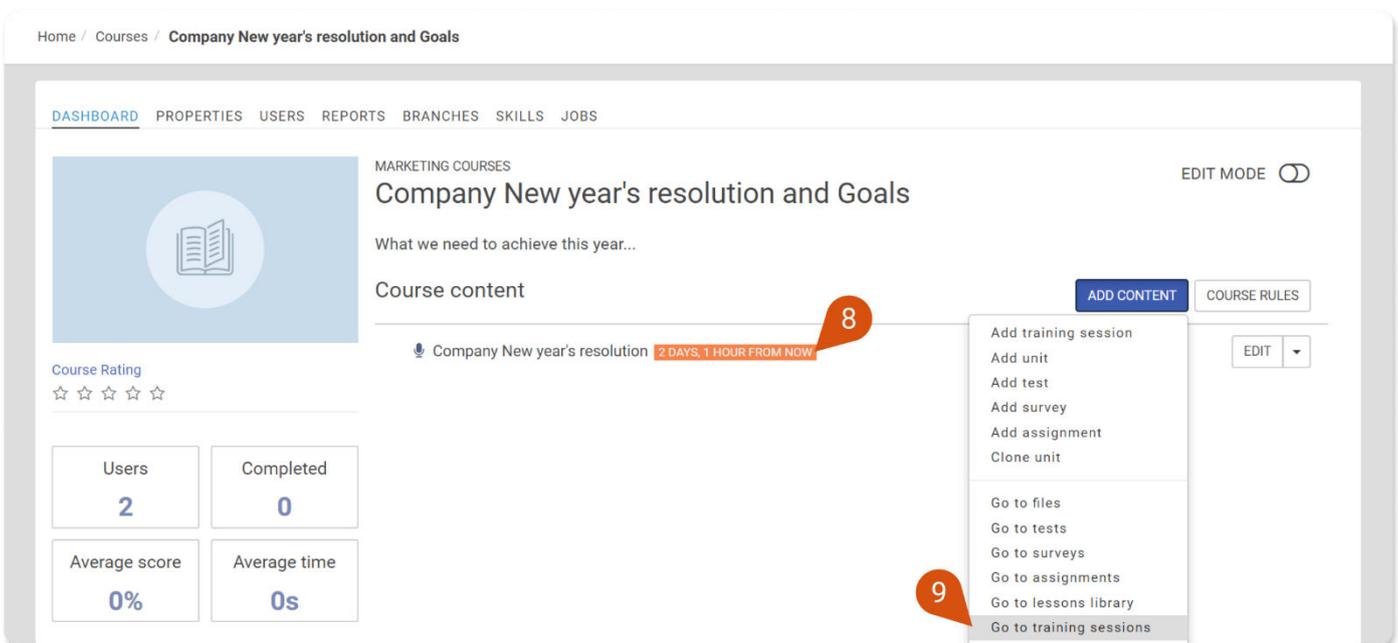
Apart from these basic settings that you can set up for the training sessions, there are some advanced settings available. You can set up:

- the maximum number of seats available for this session
- until when the users can register and cancel their registration
- the session with which this one is connected, meaning that the users have to attend all of them



As we already mentioned in the beginning, an event can have more than one sessions. In order to add another session to the same event, you have to follow the same steps.

After adding your sessions to the event and going back to the course dashboard, you will notice a tag next to the event **(8)**, informing you in how many days/hours the first session starts.



In order to access the event's sessions and edit them, you can click on the Content button and then Go to training sessions **(9)**. Through this page, you can see the list of the sessions along with some information about them, for example how many users have registered to them.

Home / Company New year's resolution and Goals / Lessons library / Company New year's resolution

PROPERTIES **SESSIONS** USERS WAITLIST

**ADD SESSION**

Name	Location	Start date	Duration	Users	Active	Operations
Meeting with CEO - targets	London Building Meeting room B	2018/02/10 14:00	2 hours	0	<input checked="" type="checkbox"/>	
Marketing Department Meeting	London Building Meeting room A	2018/02/01 12:00	3 hours	0/15	<input checked="" type="checkbox"/>	

Filter Showing 1-2 out of 2

## Adding events

In case you want to add a new training event to your course, you have to click on the Content button again and then Go to the Lessons library (1).

Home / Courses / Company New year's resolution and Goals

DASHBOARD PROPERTIES USERS REPORTS BRANCHES SKILLS JOBS

MARKETING COURSES **Company New year's resolution and Goals** EDIT MODE

What we need to achieve this year...

Course content

**ADD CONTENT** COURSE RULES

Company New year's resolution **1 DAY, 23 HOURS FROM NOW**

Course Rating  
☆☆☆☆

Users	Completed
2	0
Average score	Average time
0%	0s

1

- Add training session
- Add unit
- Add test
- Add survey
- Add assignment
- Clone unit
- Go to files
- Go to tests
- Go to surveys
- Go to assignments
- Go to lessons library
- Go to training sessions

Click on the arrow next to the Add Lesson button and click on the Add event option (2):

Home / Company New year's resolution and Goals / Lessons library

**ADD LESSON**

2

Add event

Import lesson

	Last update	Assigned to course	Operations
Company New year's resolution <b>event</b>	2018/01/30 12:15	YES	
Strategy, Governance & Compliance	2017/10/23 16:52	NO	
Google AdWords Essential Training	2017/12/08 15:33	NO	
Advanced Google AdWords Tips and Tricks	2016/03/21 11:57	NO	

A pop-up will open and you will have to fill in the required information. When adding a new event, its first session is automatically created, this is why the pop up looks similar to the new sessions:

ADD EVENT ✕

**Name\***

I don't have specific dates yet

**Date\***  [use range](#)

**Duration**  2 hour [minutes](#) [hours](#) [days](#)

**Location\***  [Your current timezone is \(UTC+02:00\) Europe/Athens](#)

**Short description**

[Show advanced settings](#)

[ADD](#)

After clicking Add, you are redirected to the course dashboard and you can now see the two events with the Event tag next to their title **(3)**. Each one of them has its own Content button **(4)** that allows you to manage their Training Sessions **(5)**.

Home / Courses / Company New year's resolution and Goals

DASHBOARD PROPERTIES USERS REPORTS BRANCHES SKILLS JOBS

MARKETING COURSES

Company New year's resolution and Goals EDIT MODE

What we need to achieve this year...

Course content COURSE RULES

3
 Company New year's resolution EVENT ADD CONTENT

4
 Company New year's resolution 1 DAY, 23 HOURS FROM NOW EDIT

5
 Presentations (targets) EVENT ADD CONTENT

Presentations (targets) 7 DAYS, 3 HOURS FROM NOW

Add training session  
 Add unit  
 Add test  
 Add survey  
 Add assignment  
 Clone unit  
 Go to files  
 Go to tests  
 Go to surveys  
 Go to assignments  
 Go to lessons library  
 Go to training sessions

Course Rating  
 ☆ ☆ ☆ ☆ ☆

Users	Completed
2	0
Average score	Average time
0%	0s

**Note:** If you have originally created an eLearning-type course and later changed it to Blended, you will need to follow the above steps and add an event lesson in order to add Sessions.

### Enriching Event with Assets

Usually, the trainer will want to share additional resources with the Event's learners, such as files, content, etc. You can do this by adding e-learning content to the course. These will appear in the learner's dashboard just like they would if it were an eLearning-only Lesson.

### Setting up a Location

Locations are names of the venues (real or virtual) that classes or meetings will take place, allowing you to organize your class schedule and inform your students of upcoming meetings.

# Registering user for Training Sessions

There are 2 ways for a learner to register for a Training Session:

1. The administrator/instructor assigns the user to one.
2. The users select their preferred session after enrolling to the course.

This will then appear under yours and the learner's calendar (example below) – which can be viewed from the main homepage/dashboard:

CareTutor Search... EN

Home / Calendar

March 2025 MONTH WEEK DAY ADD EVENT EXPORT

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
24	25	26	27	28	1	2
3	4 12:00 - 14:00 Training session Personal	5 12:00 - 14:00 Training session Moving	6 10:00 - 12:00 Training session Fire Saf 12:00 - 14:00 Training session CPI, Res 14:00 - 16:00 Training session Fire Saf	7 10:00 - 14:00 Training session Basic L	8	9
10 10:00 - 12:00 Training session Fire Saf 12:00 - 14:00 Training session Emerge 14:00 - 16:00 Training session Fire Saf	11 09:00 - 16:00 Training session Corpor	12 09:00 - 16:00 Training session Moving	13 10:00 - 12:00 Training session Fire Saf 12:00 - 14:00 Training session CPI, Res 14:00 - 16:00 Training session Fire Saf	14	15	16
17	18	19	20	21	22	23

## Method 1: The administrator assigns a user to a session

As an administrator/instructor, navigate to the Training Event's page, from *The Course* > *Select the training event that interests you* and click to edit it **(2)**.

Home / Courses / Moving and Positioning People/Falls Prevention - F2F

DASHBOARD PROPERTIES USERS REPORTS BRANCHES SKILLS JOBS COURSE ANNOUNCEMENTS

Moving and Positioning People/Falls Prevention - F2F EDIT MODE

There is no description for this course

Course content

GENERATE AI TEST ADD CONTENT COURSE RULES

Moving and Positioning People/Falls Prevention - F2F 28/03/2025 09:00

COURSE RATING: ☆☆☆☆☆

Users	Completed
410	220
Average score	Average time
100%	1m 5s

EDIT

Then go to the Users **(3)** tab where you will see the list of the users that are already enrolled in this blended learning course. Under the Sessions, column click on the Unassigned link to select the session of the event **(4)**.

Home / Company New year's resolution and Goals / Lessons library / Company New year's resolution

PROPERTIES SESSIONS **USERS** WAITLIST

User	User type	Session	Status
E. Papatheodorou	Administrator	Unassigned	Incomplete
E. Papatheodorou	<b>INSTRUCTOR</b>	Unassigned	-
E. Papatheodorou	Learner	Meeting with CEO - targets (London Building Meeting room B, 2018/02/10 14:00)	Not started
C. Cooper	Learner	Marketing Department Meeting (London Building Meeting room A, 2018/02/01 12:00)	Not started
E. Rivera	Learner	Marketing Department Meeting (London Building Meeting room A, 2018/02/01 14:00)	Not started
D. Stewart	Learner	Marketing Department Meeting (London Building Meeting room A, 2018/02/01 14:00)	Not started
C. Patterson	Learner	Unassigned	Not started
B. Cook	Learner	Meeting with CEO - targets (London Building Meeting room B, 2018/02/10 14:00)	Not started
S. Wondr	Learner	Meeting with CEO - targets (London Building Meeting room B, 2018/02/10 14:00)	Not started

**Note:** Through this page, you can only see the sessions of the specific training event.

Another way to assign the users to a training session is to edit the **course** and move to the course Users tab **(1)**. Under the operations column, you will find the Set sessions option **(2)**.

Home / Courses / Company New year's resolution and Goals / Users

DASHBOARD PROPERTIES **USERS** REPORTS BRANCHES SKILLS JOBS

User	Registration date	Completion date	Status	Score	Progress	Enrollment	Operations	Select
E. Papatheodorou	2018/01/29 16:39	-	Registered	-	-	ENROLLED		
E. Papatheodorou	2018/01/29 16:39	-	Not started	-	0%	ENROLLED		<input type="checkbox"/>
C. Cooper	2018/01/30 18:08	-	Not started	-	0%	ENROLLED		<input type="checkbox"/>
E. Rivera	2018/01/30 18:08	-	Not started	-	0%	ENROLLED		<input type="checkbox"/>
D. Stewart	2018/01/30 18:08	-	Not started	-	0%	ENROLLED		<input type="checkbox"/>
C. Patterson	2018/01/30 18:08	-	Not started	-	0%	ENROLLED		<input type="checkbox"/>
B. Cook	2018/01/30 18:08	-	Not started	-	0%	ENROLLED		<input type="checkbox"/>
S. Wondr	2018/01/30 18:08	-	Not started	-	0%	ENROLLED		<input type="checkbox"/>
P. Tzouanaki						ENROLL NOW		<input type="checkbox"/>
G. Vakalopoulou						ENROLL NOW		<input type="checkbox"/>

A pop-up with all the available sessions of all training events of this course will show up. Click to select the session of the training event you want **(3)**.

Training event: Company New year's resolution 

Training session: Meeting with CEO - targets  · London Building Meeting room B, 2018/02/10 14:00  SELECTED

Training event: Presentations (targets) 

Training session 1: Presentations (targets)  · San Francisco office, 2018/02/06 07:00  SELECT

Training session 2: Presentations (targets) Europe  · London Building Meeting room A, 2018/02/10 14:00  SELECT



**Note:** A learner can only be assigned to a single Training Session for a given Training Event. A trainer, however, can be registered to as many needed

Through this same tab, you can also amend the completion dates (retrospectively) of that course on a user's profile tab under through the edit button:

Progress	Enrolment	Enroll...	Operations	Select
-	<input checked="" type="checkbox"/>	-	   	<input type="checkbox"/>
100%	<input checked="" type="checkbox"/>	-	  	<input type="checkbox"/>

From this pop-up you can manually populate the course under the "Profile tab" (shown below) and then scroll down and click submit



My Courses / Company New year's resolution and Goals / **Company New year's resolution: Company New year's ...** EXIT FULLSCREEN

AVAILABLE SESSIONS

Training session: Meeting with CEO - targets (London Building Meeting room B, 2018/02/10 16:00) SELECT

Name	Meeting with CEO - targets
Location	<a href="#">London Building Meeting room B</a>
Starts	2018/02/10 16:00
Duration	2 hours
Cancellation deadline	Possible until start

**You haven't selected a session yet.**

[Click to select a session](#)

After selecting the session, the users will be redirected to the session's information page:

My Courses / Company New year's resolution and Goals / **Company New year's resolution: Company New year's ...** EXIT FULLSCREEN

 **SESSION TITLE**  
**Meeting with CEO - targets**  
[Select another](#)

---

 **LOCATION**  
**London Building Meeting room B**  
[Information](#)

---

 **STARTS**  
**9d 22h from now**  
[Unenroll](#)

---

 **CANCELLATION**  
**Possible until start**