CareTutor

Manager / Admin Instructions

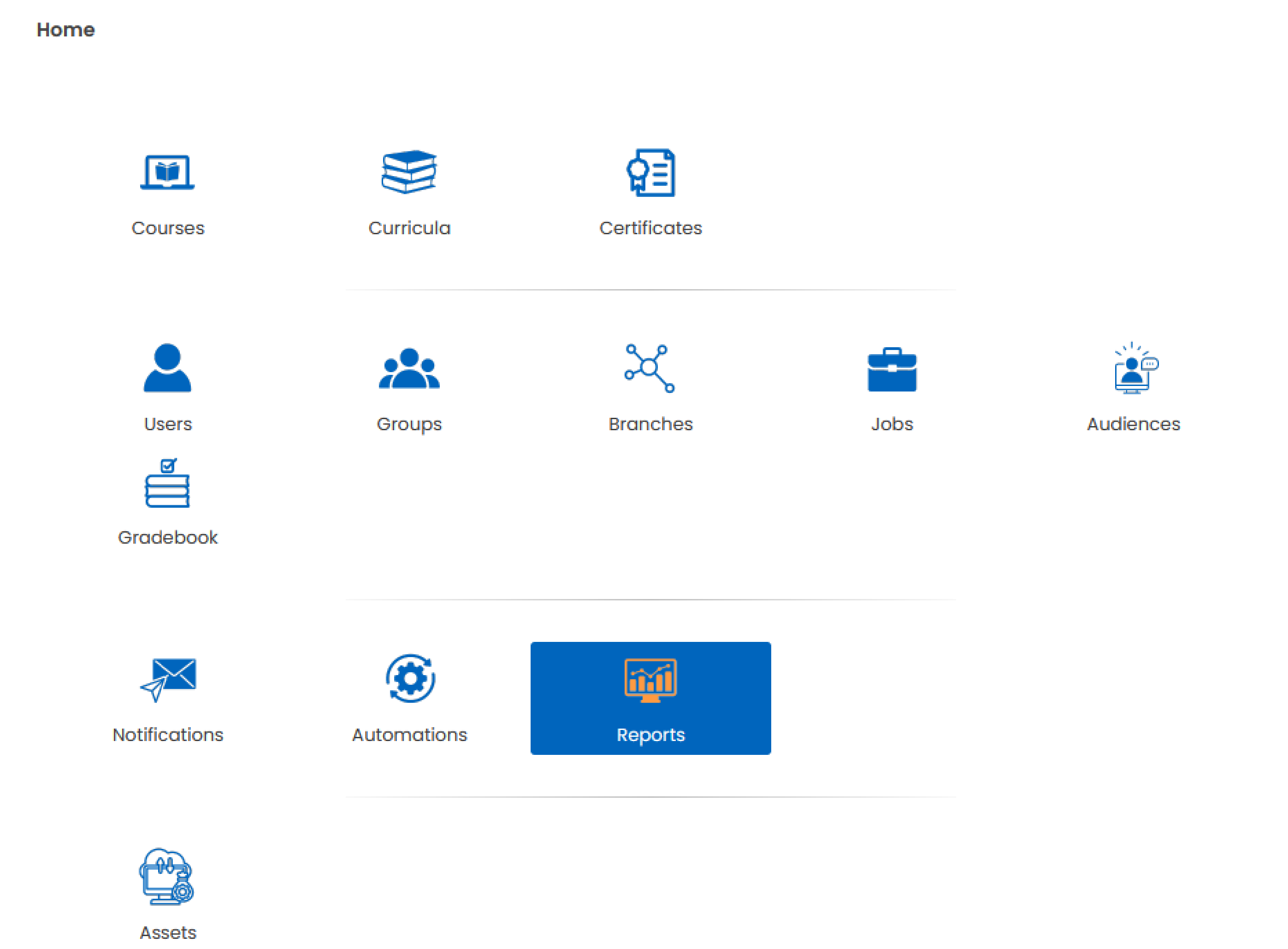
Instruction Contents:

Pathway Essentials:

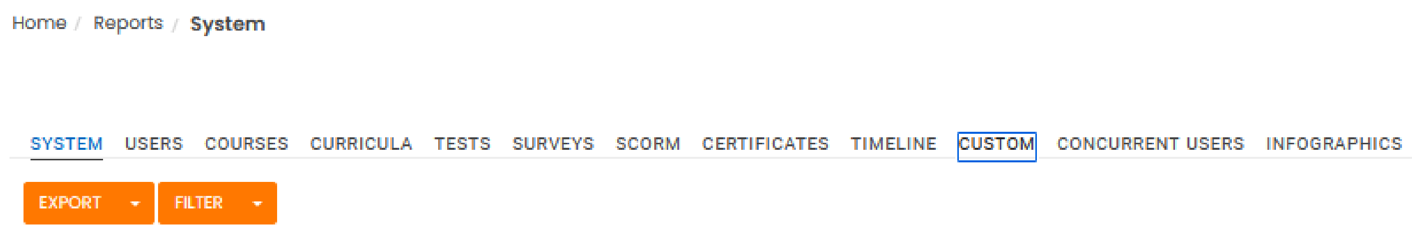
Pathway Plus and Pro:

How to Create Custom reports

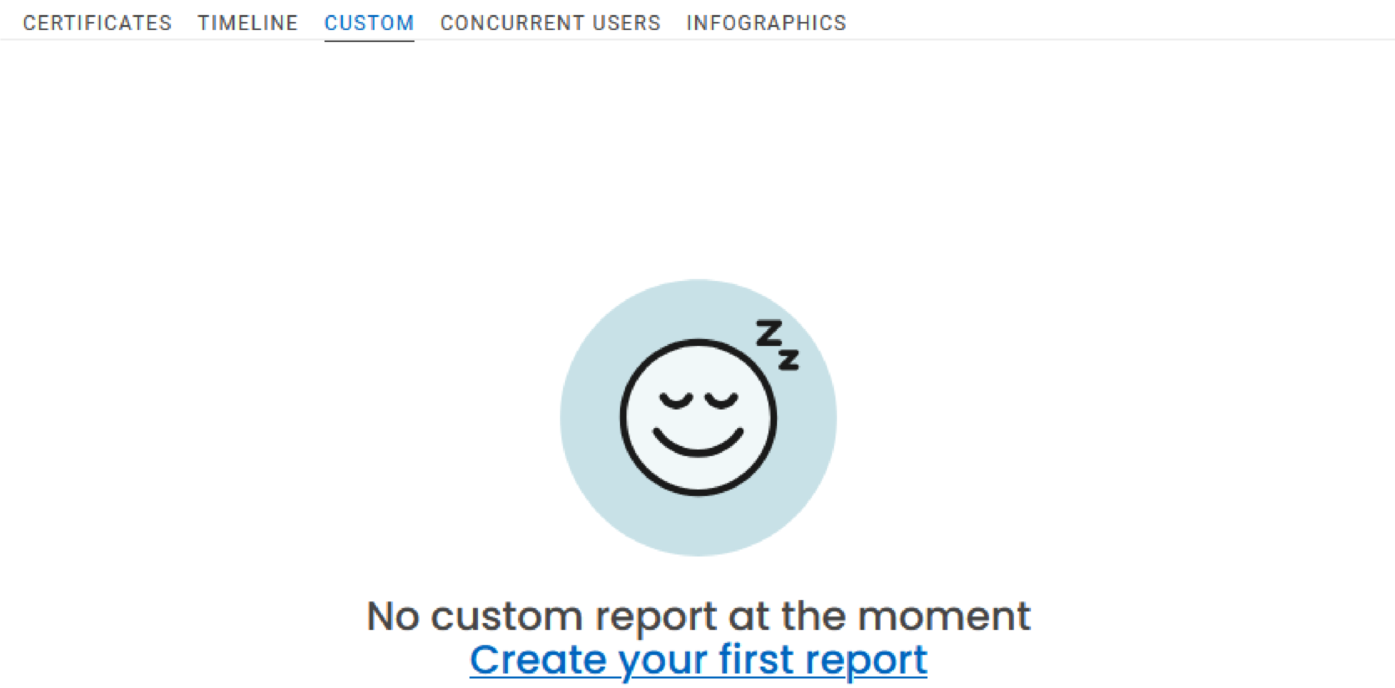
To create a custom report, log in as an administrator, and from your Administration dashboard, visit Reports.



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



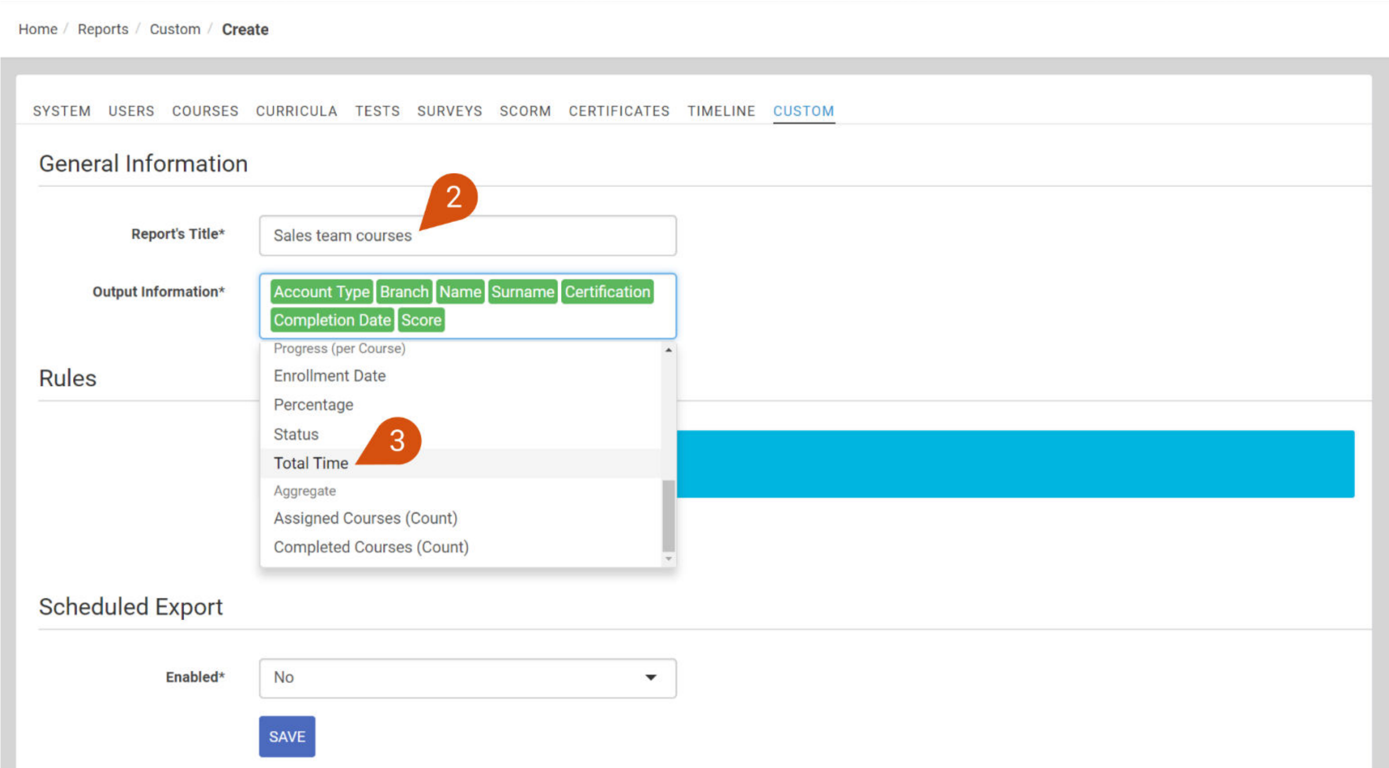
You shall see a tabular list of all available custom reports, or if you do not have any custom reports set up yet the following screen.



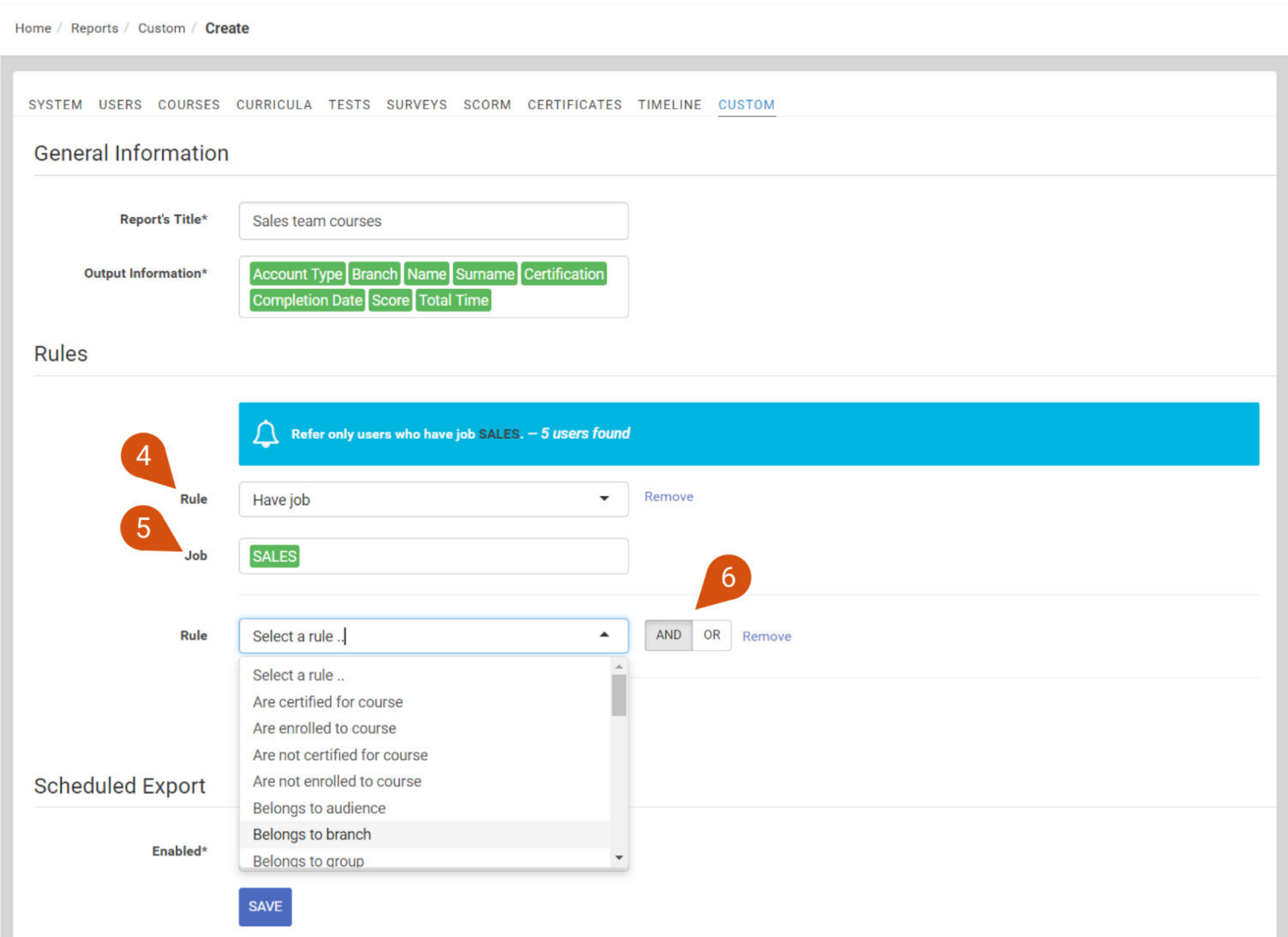
Clicking "Create your first report" to start the set up a new custom report will get to you the Custom Report Create page.

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.

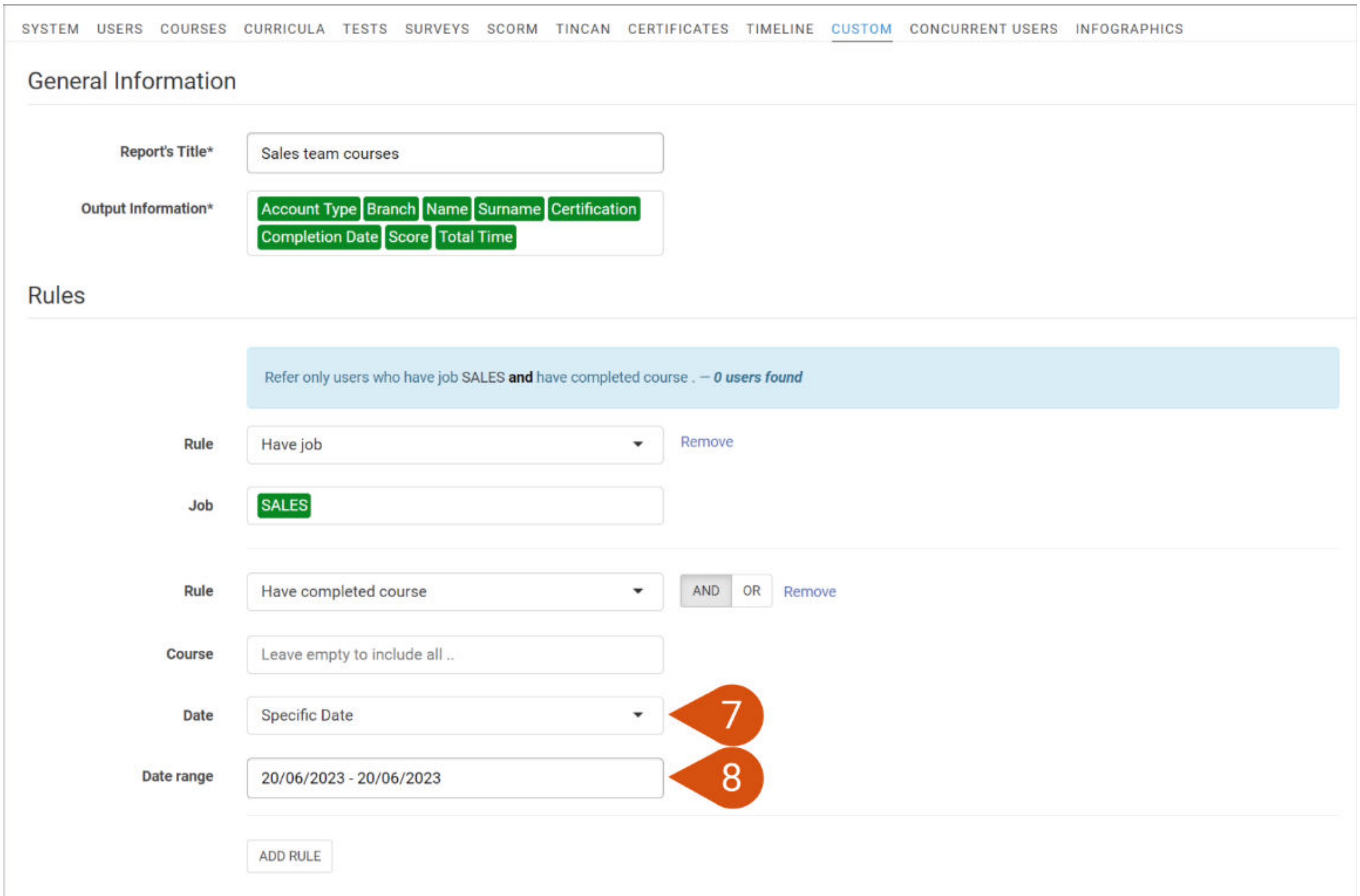


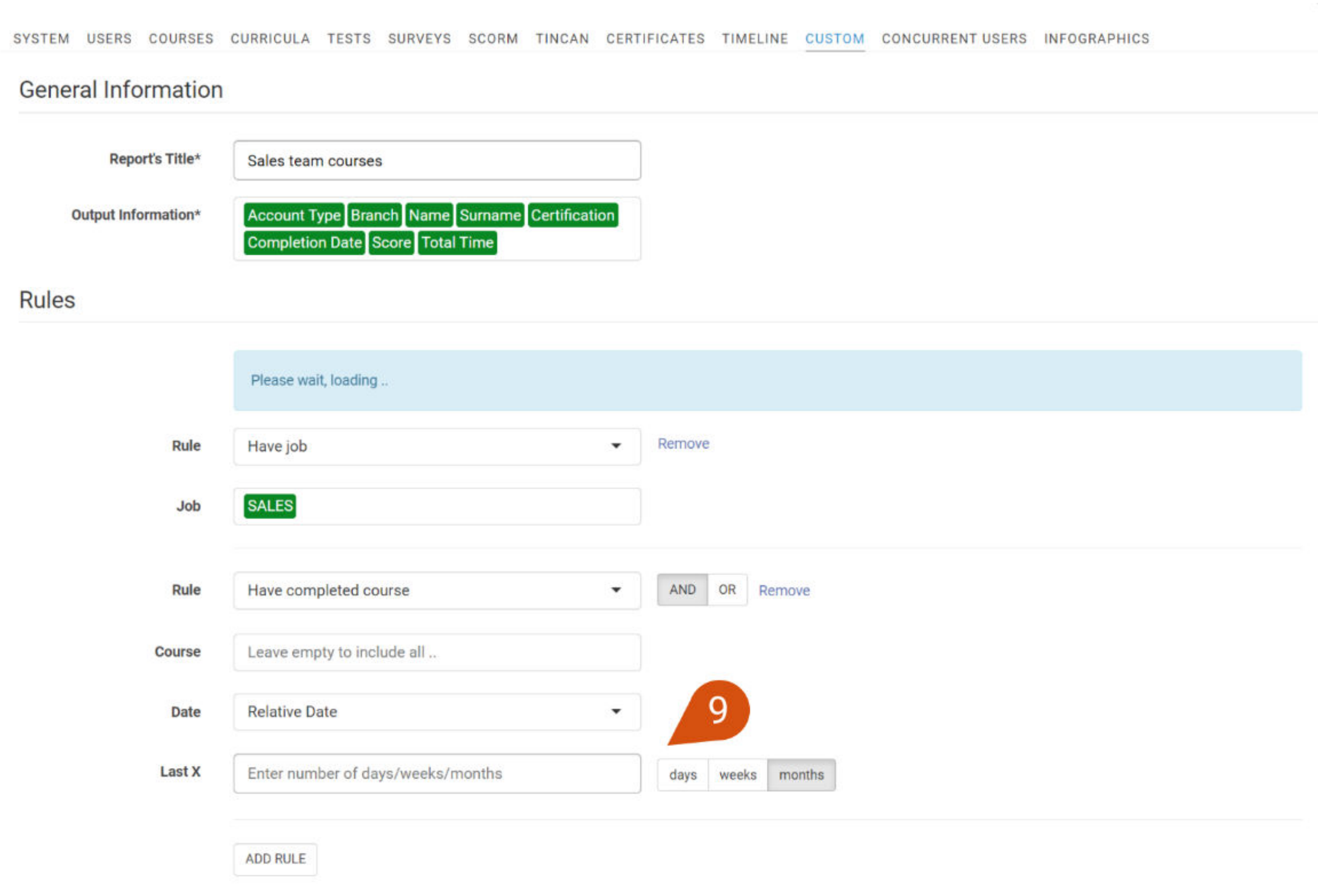
Next, you can add rules **(4)** to better narrow down your report. Select the rules that will define what data is going to be included in your report. After selecting a rule, you can specify it further **(5)**.



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).

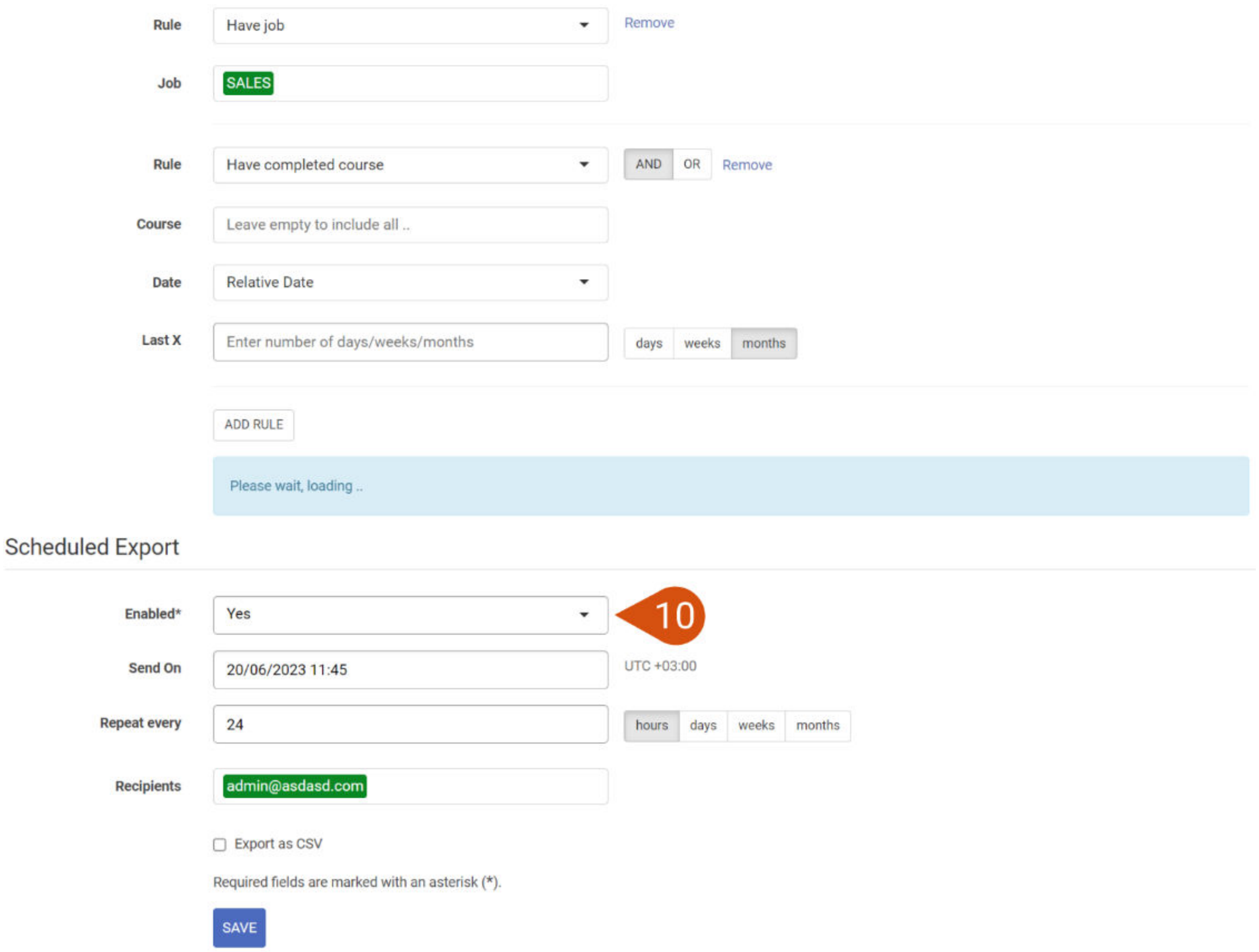
Course, Curriculum, and Certification rules include a date field **(7)**. You can specify a date range **(8)** in which the learner has completed a course/curriculum or was awarded a certificate, or you can specify the number of days, weeks, or months **(9)** relative to today's date.





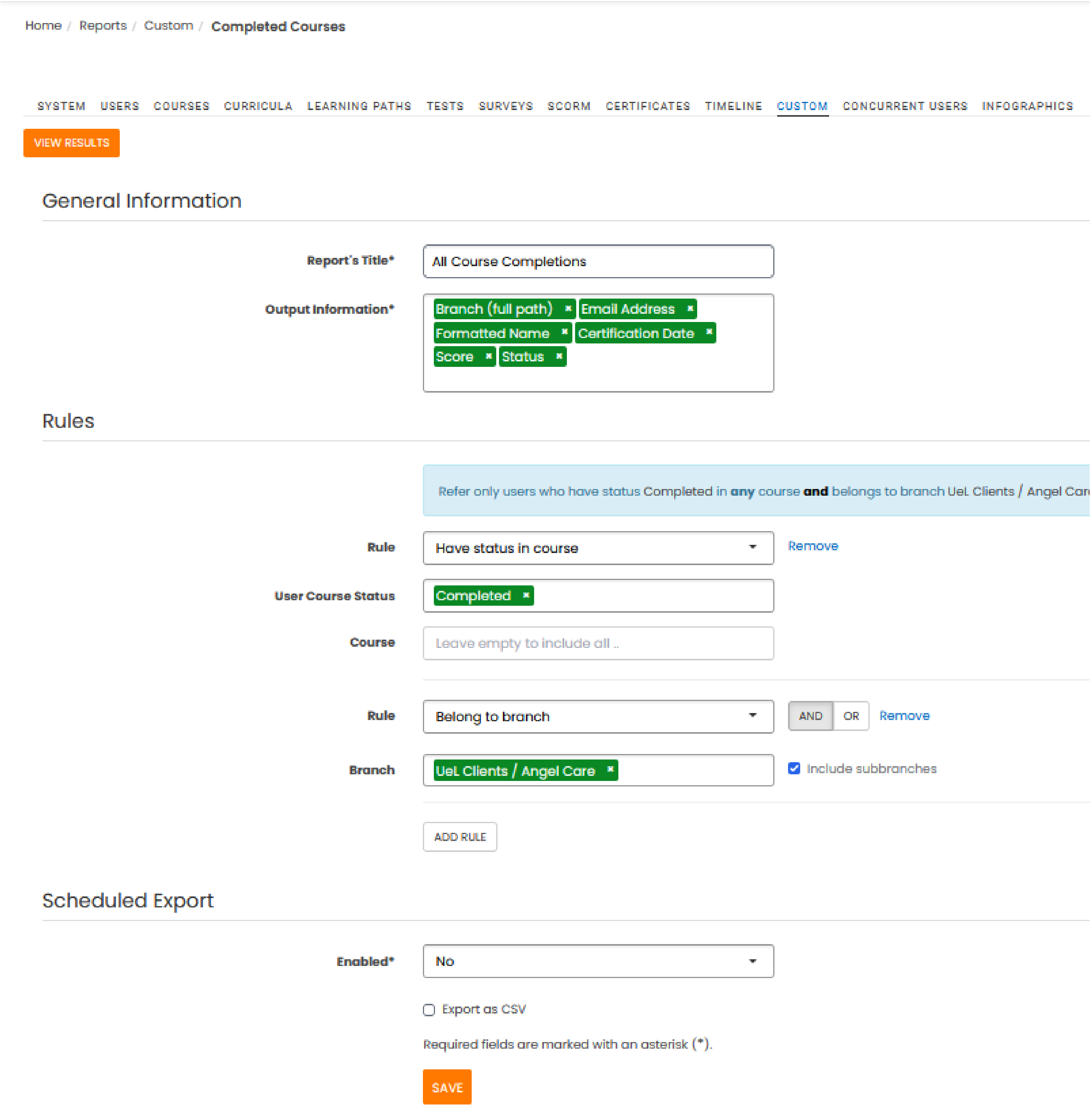
Finally, you can select whether you want this report to be executed periodically or not and set up a schedule for it.

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.



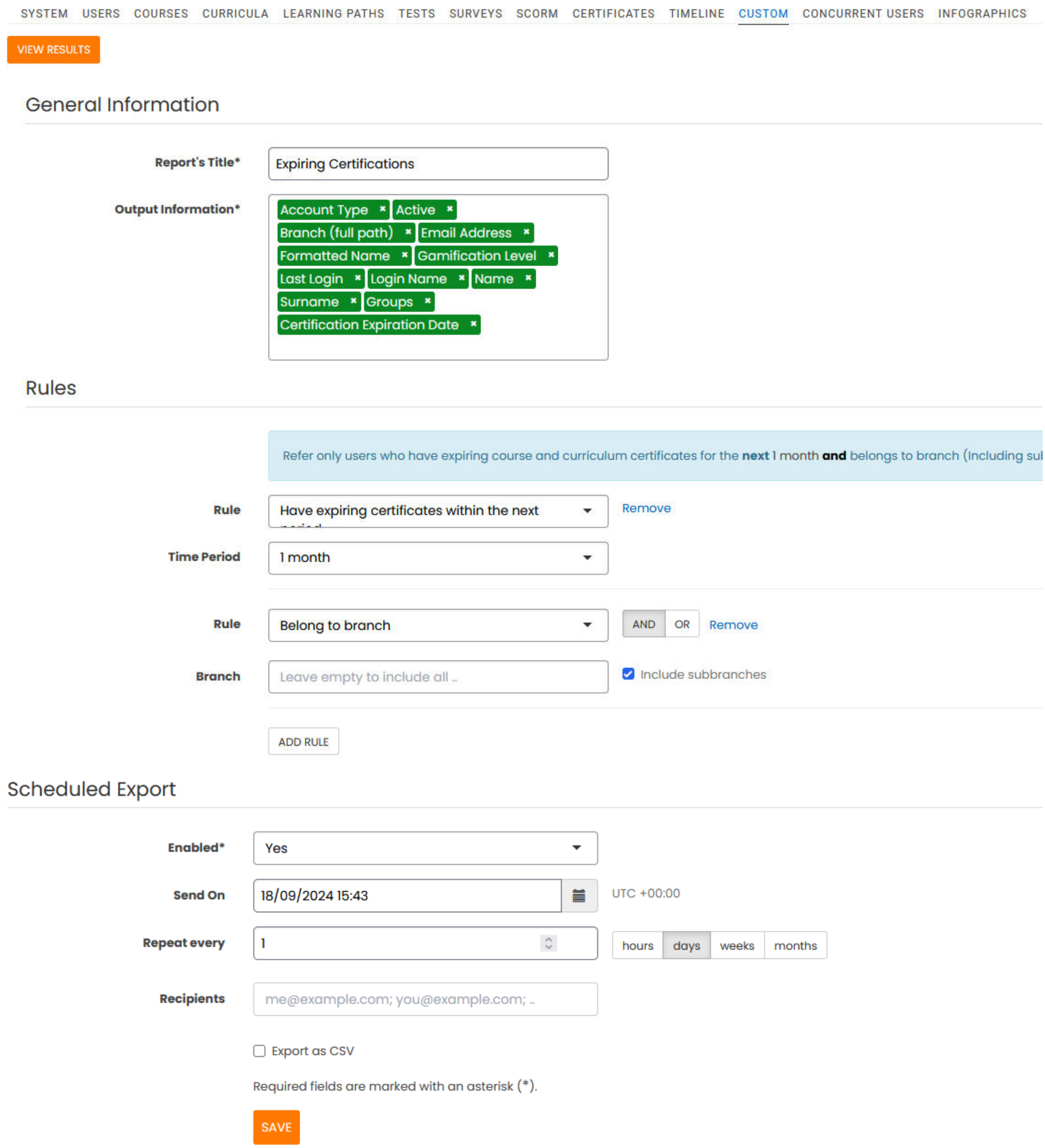
When you are done, click save and you will be presented with the list of users that comply with the rules you have set up and export them to Excel.

Example 1: All Course Completions



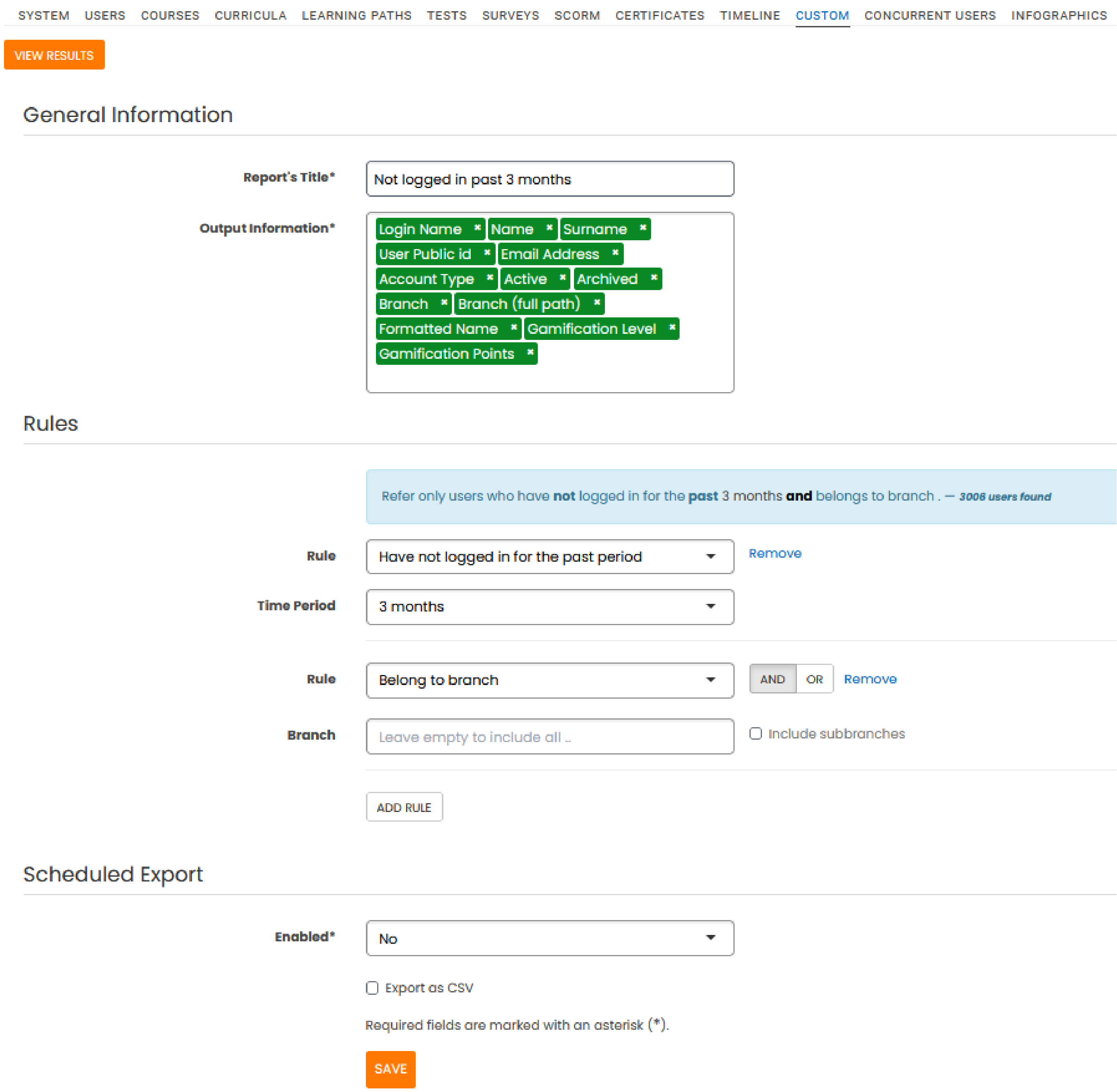
Note: Branch that this applies to is important, if you want to select your whole organisation then leave this field blank. Additionally remember to tick "Include subbranches" if you want to include all users in the organisation / location / department etc.

Example 2: Certificates expiring within the next 3 months



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 able be scheduled for a recurring period of time (e.g. Repeat every 1 day).

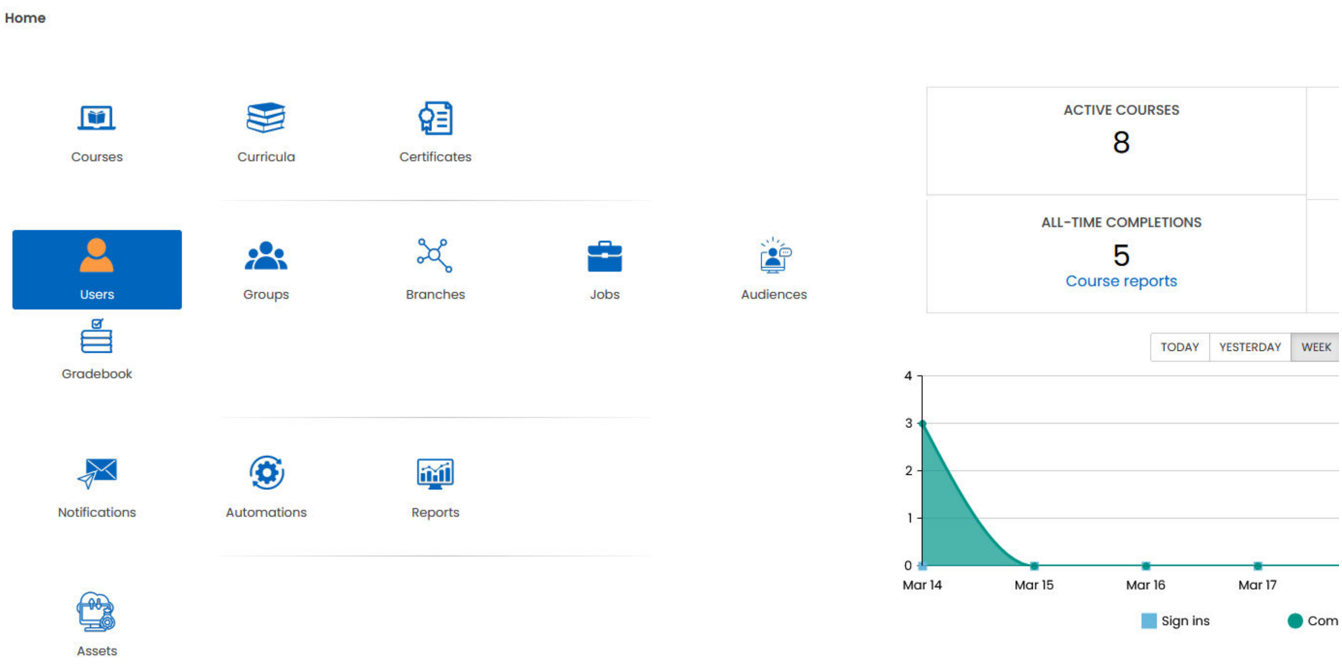
Example 3: Users who haven't logged in within the past 3 months



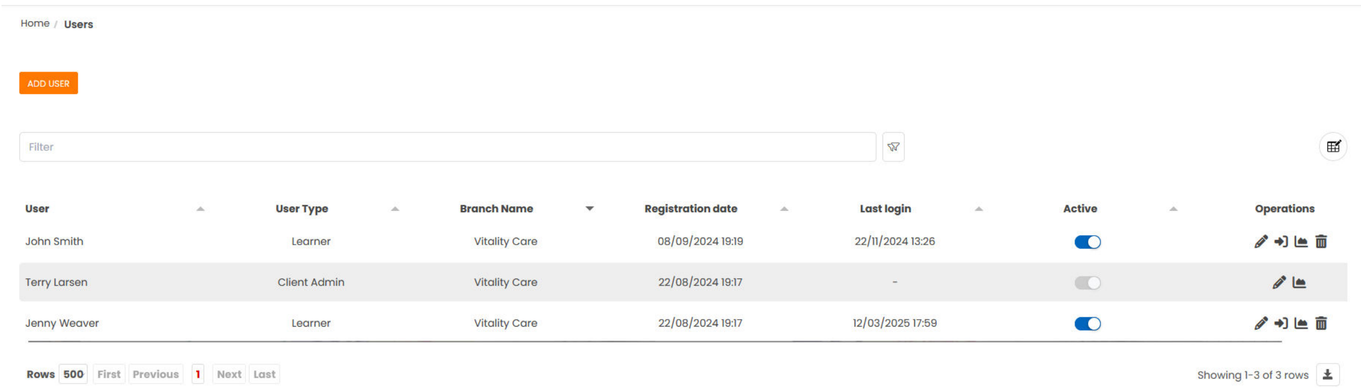
Note: If you wish to look at this within a specific branch, this will be included as additional rule (as shown above), with the particular branch selected, along with the option to included sub-branches.

How to Reset a Course for a User

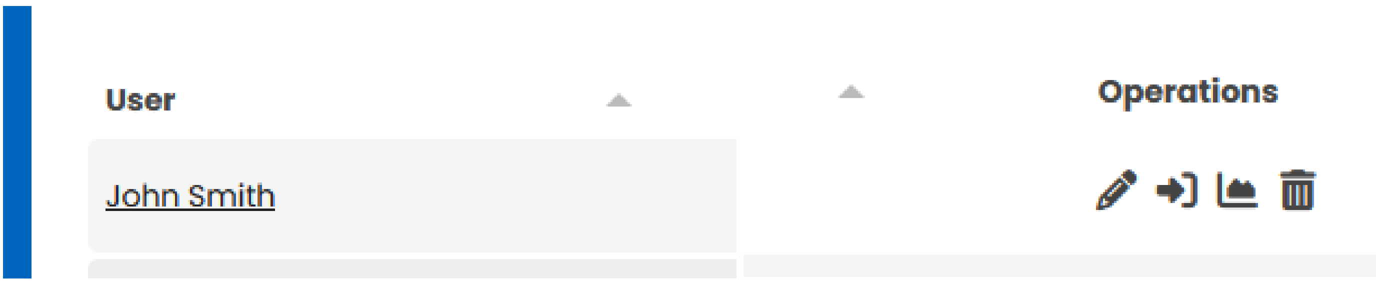
1. From the main Client Admin dashboard go to users



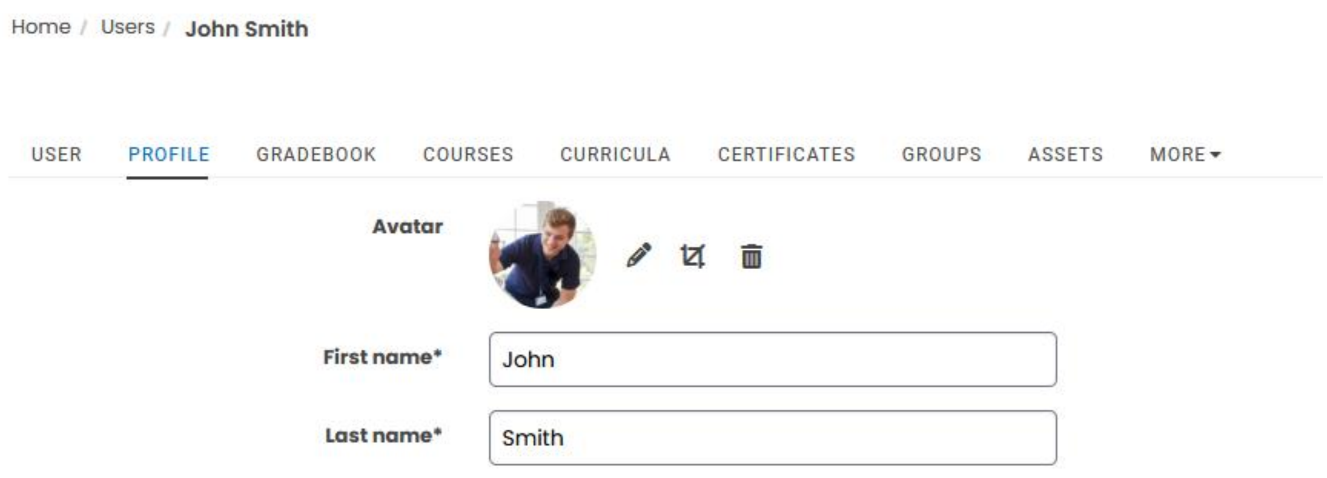
2. Search for the user concerned using the filter text bar



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

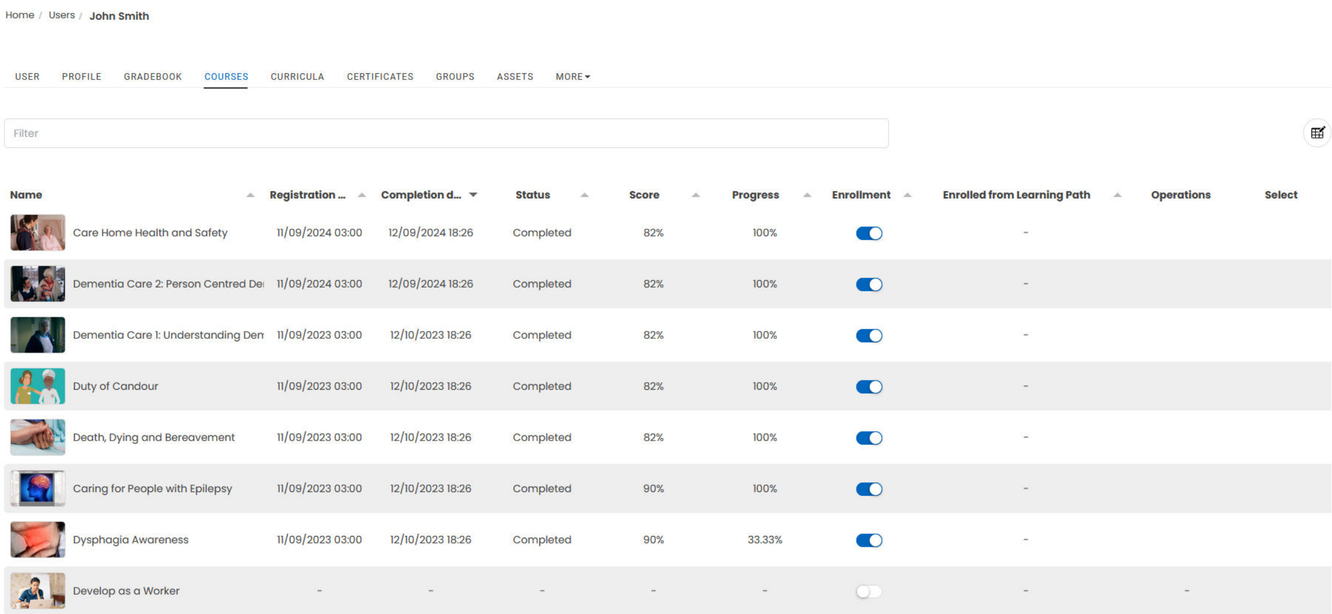


The users account profile will now appear

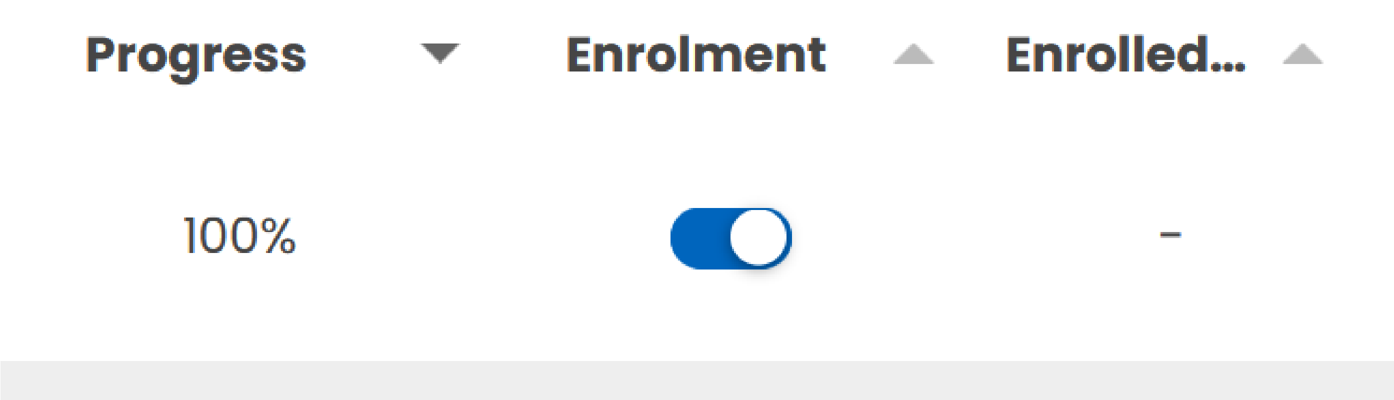


4. Go to the Courses tab

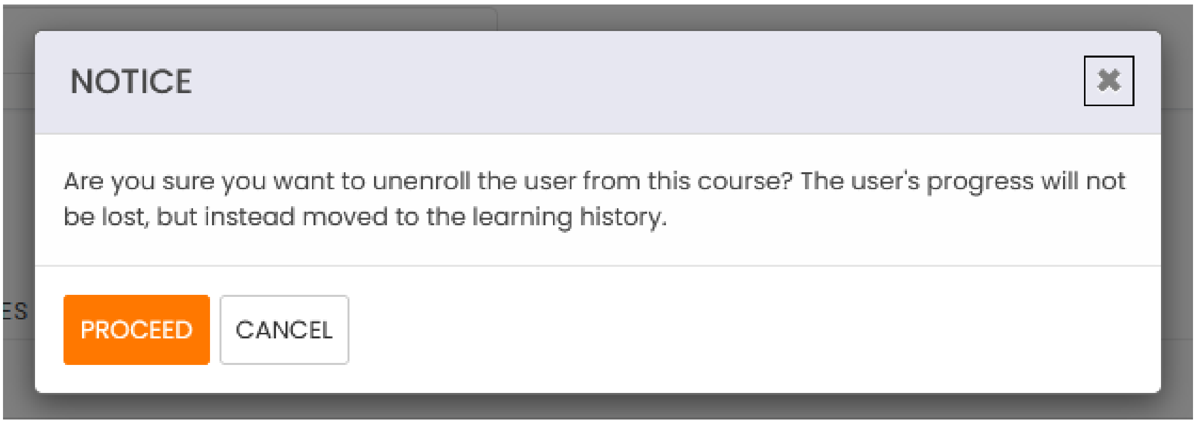
The courses that user has been enrolled in will show (example below)



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

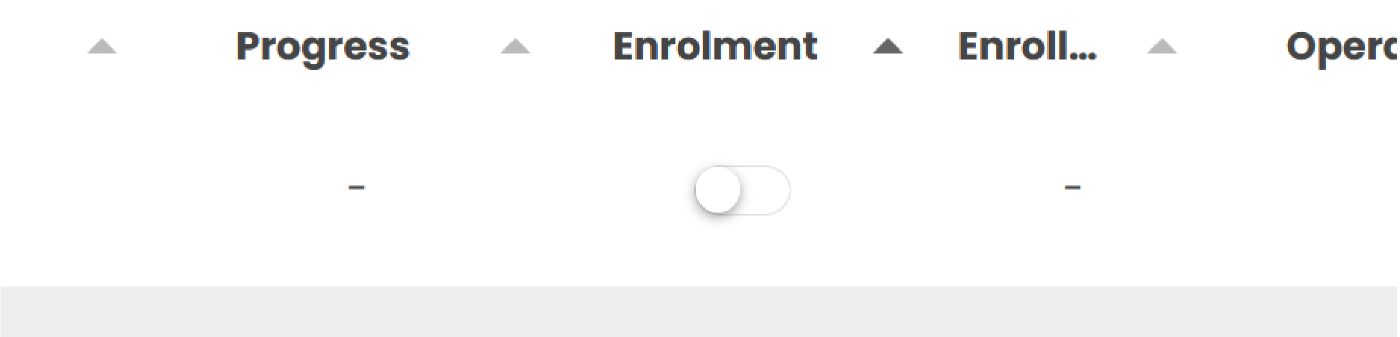


6. Click Proceed for pop-up that appears



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

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



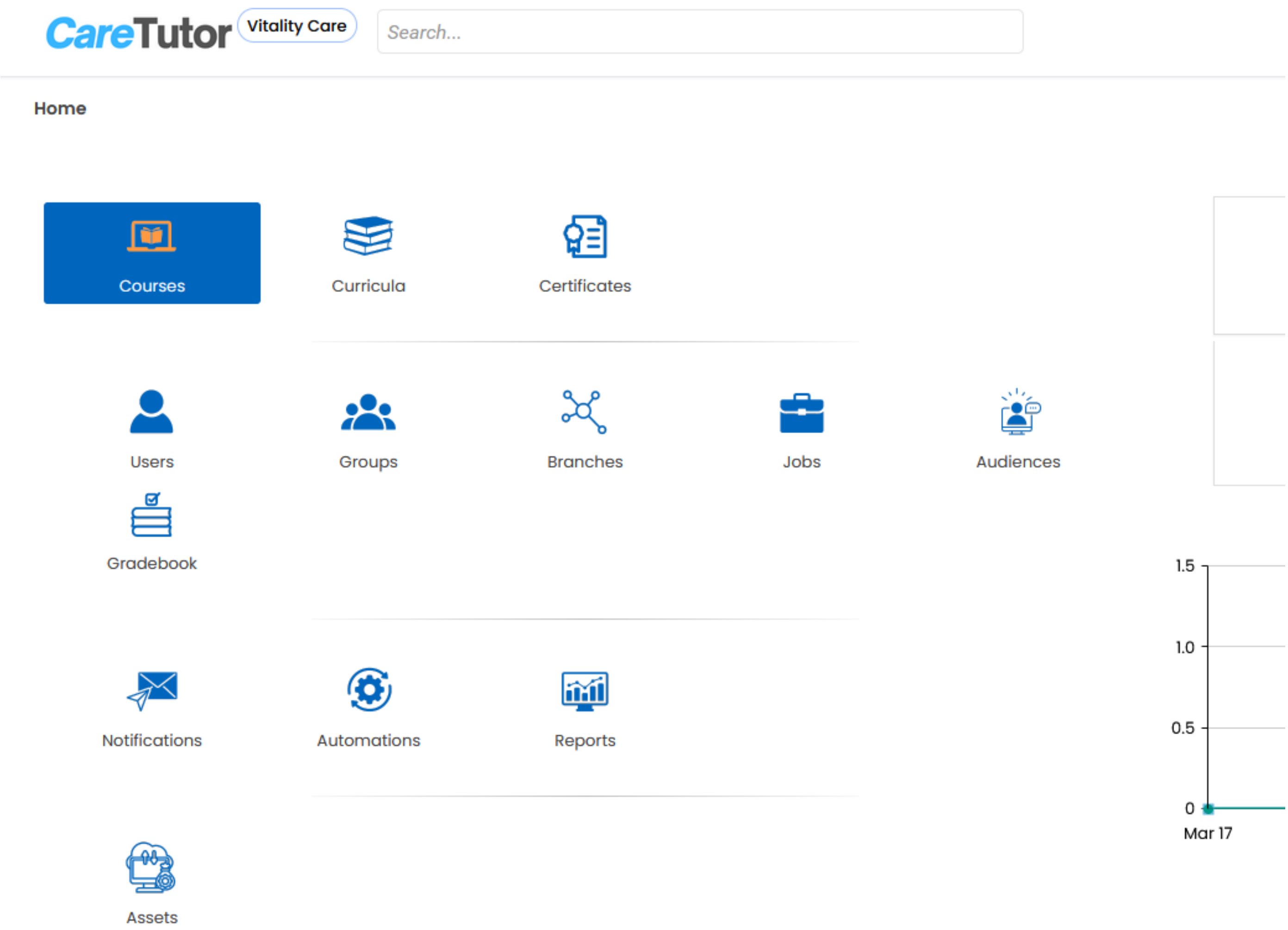
The user's course information will change to only show the new registration date (today), and status – Not Started. With no completion date, score, or progress.

Name	Registration ...	Completion d...	Status	Score	Progress	Enrollment
Care Home Health and Safety	21/03/2025 12:59	-	Not started	-	-	

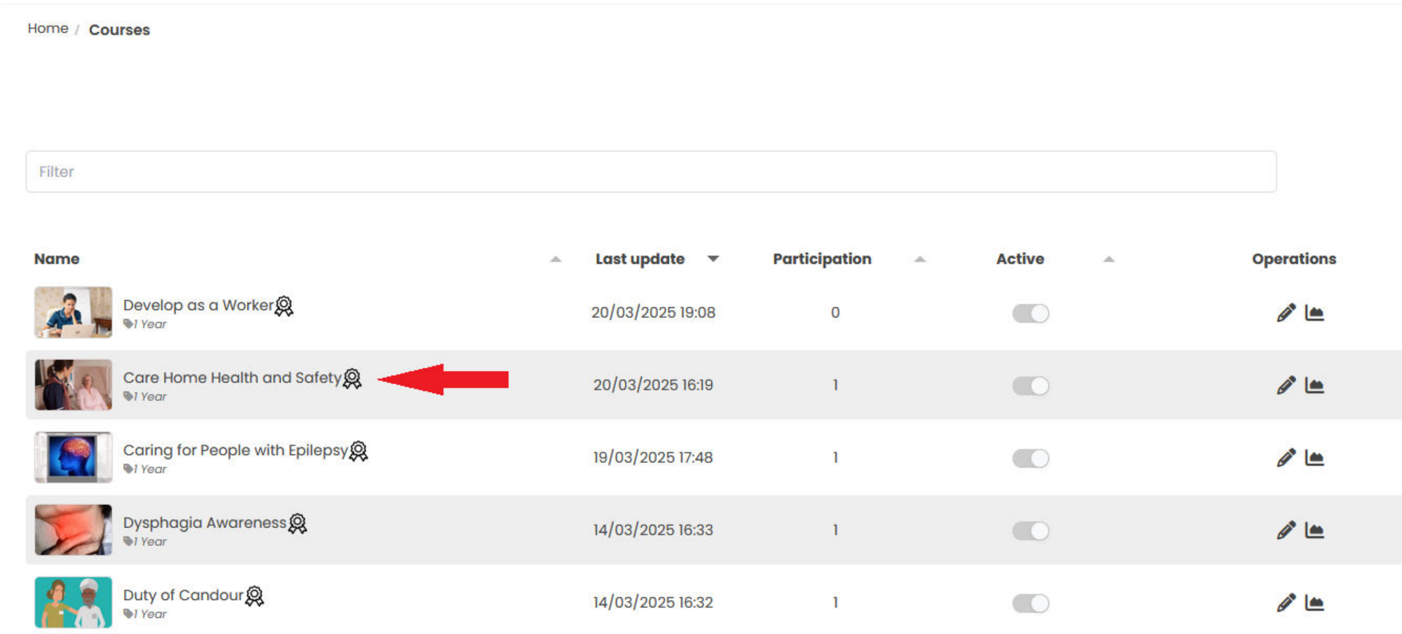
The user’s dashboard will now show the course as registered and requiring completion (see below)

How to Bulk Edit Course Completions for Users

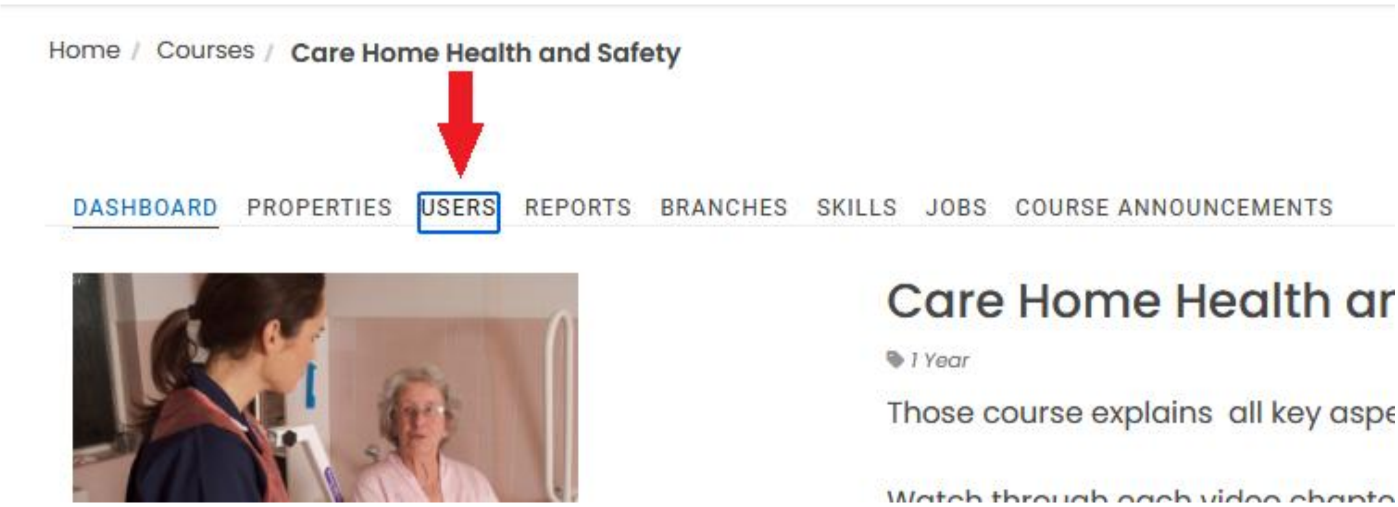
From the Homepage dashboard go to > Courses



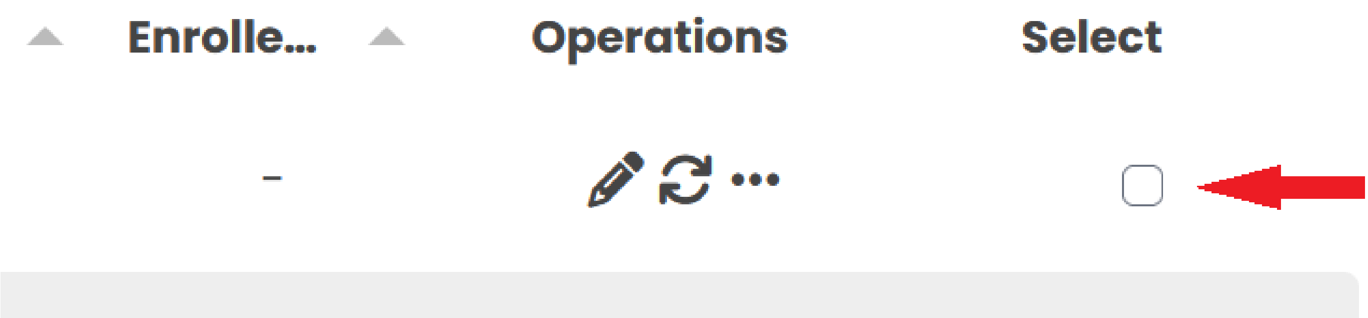
Then select the course:



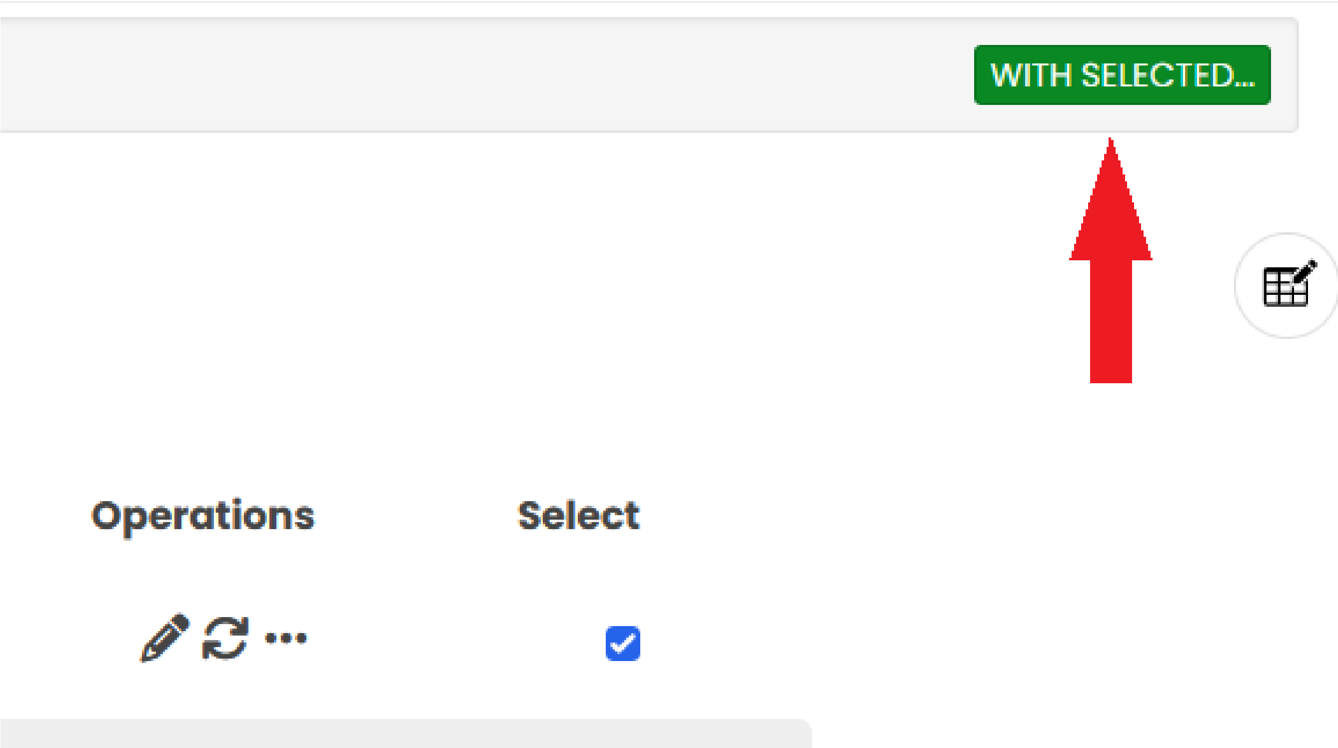
Go to Users:



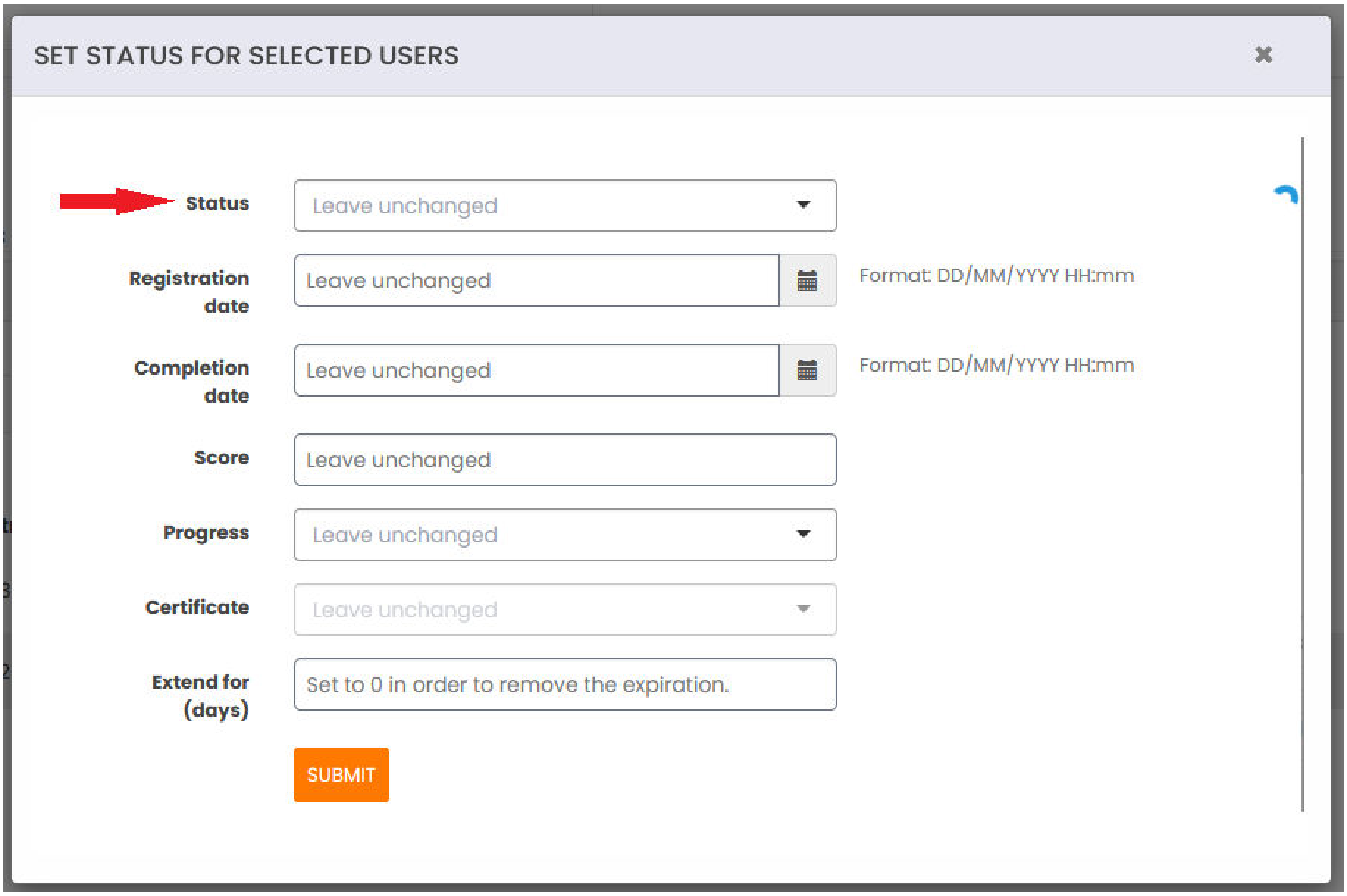
Select all the users who have completed this course from the selection:



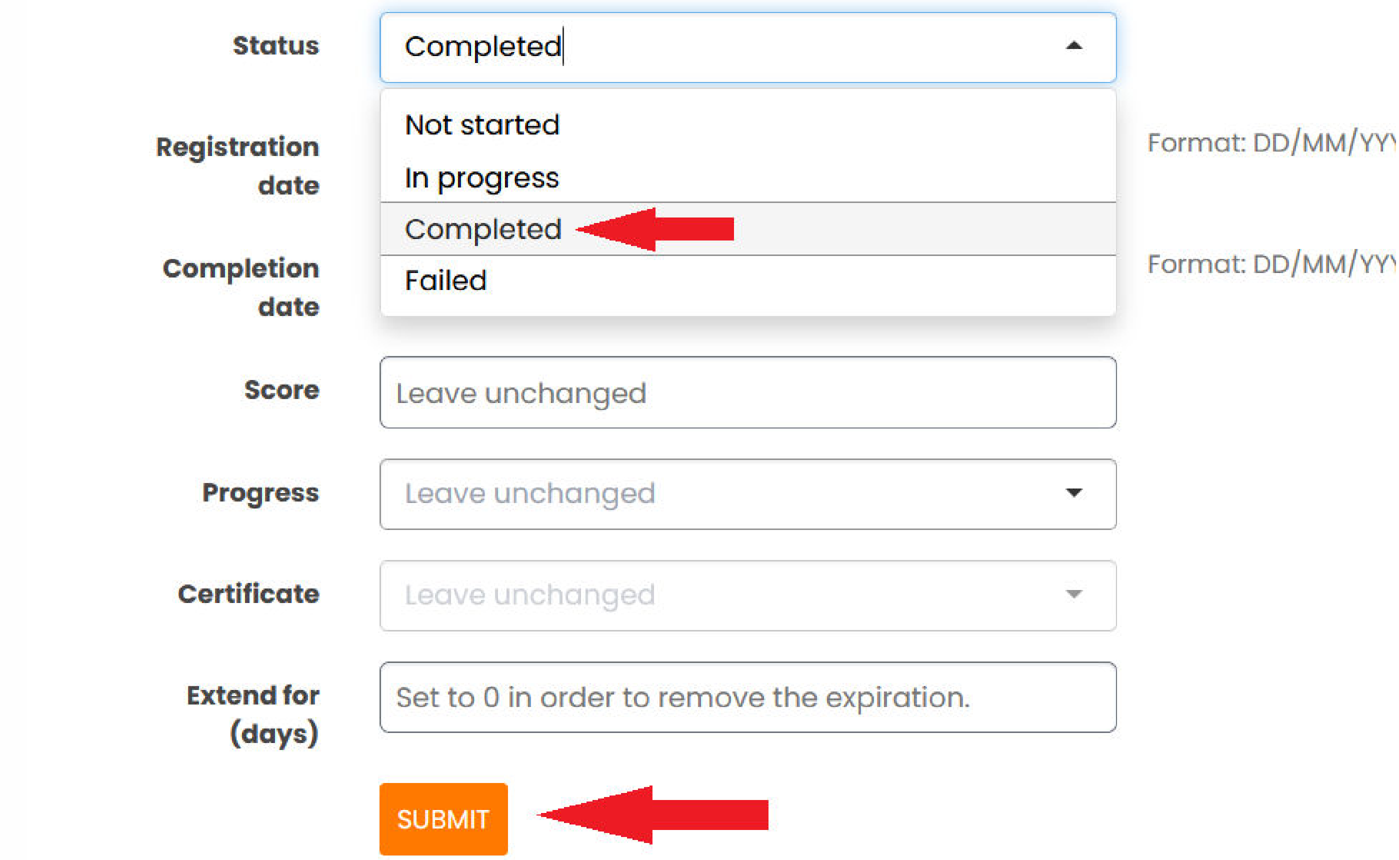
Click on the “With Selected” tab that appears:



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



Finally, change Status to “Completed”, and click “Submit”:



How to Create and Edit a Curricular

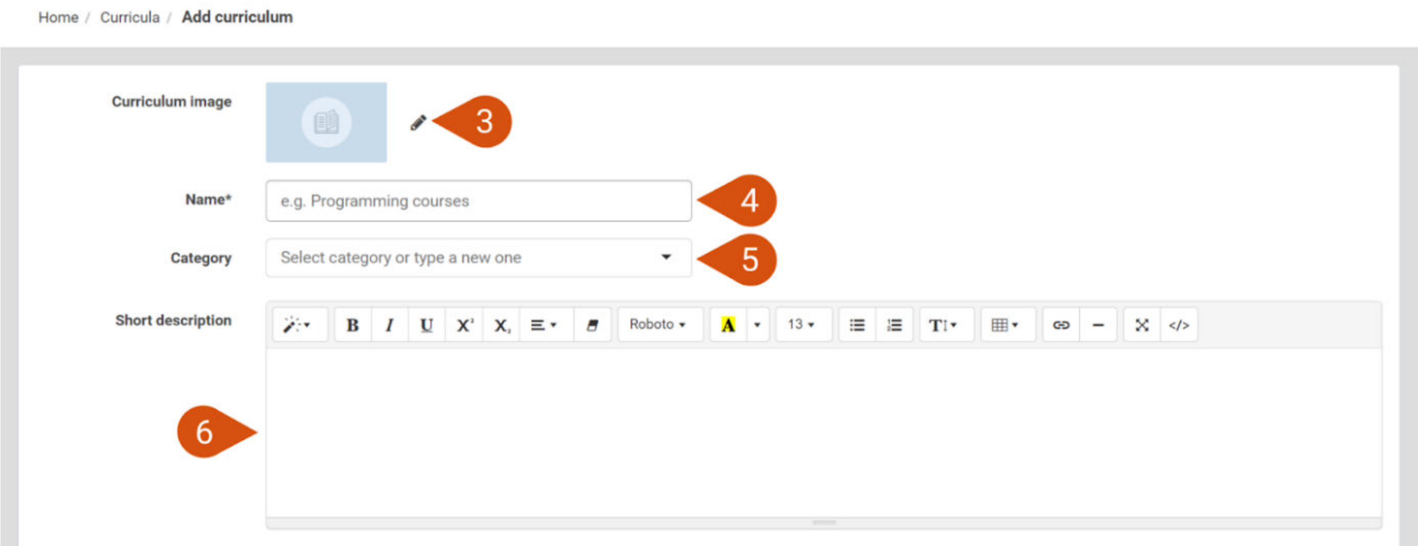
Adding a Curriculum

To add a new curriculum, follow the steps below:

1. Sign in as a Client Admin and go to **"Curricula" (1)**

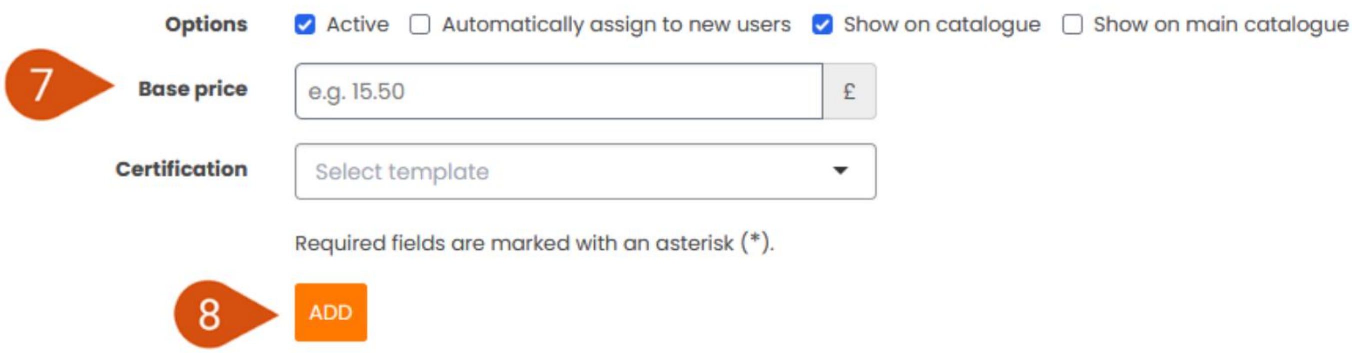
2. Select **"Add Curriculum (2)**.

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:

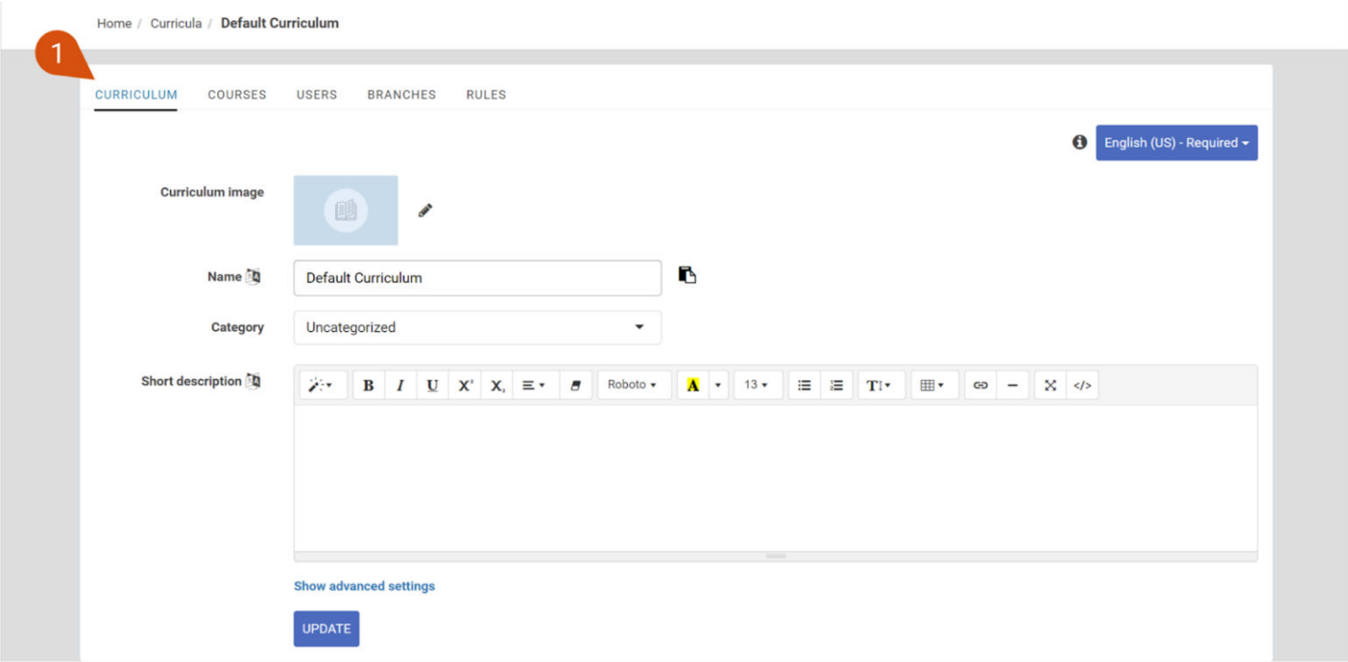
- **Active**: Check this option if you want your curriculum to be active and available to your users or not.
- **Automatically assign to new users**: Check this option if you want new users who are added to the system (or into the branch that the curriculum is assigned to) to also be enrolled in the 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.



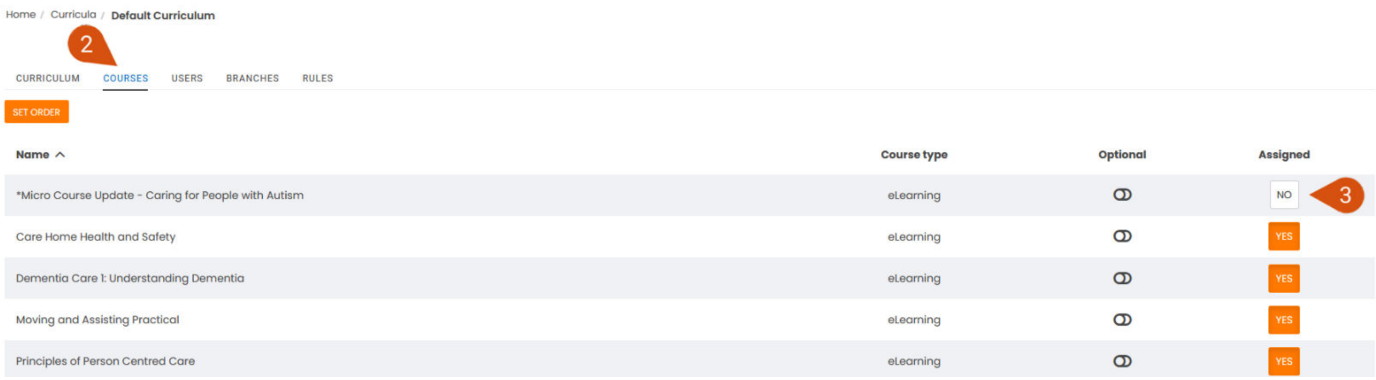
Lastly, when finished click "Add"

Editing a Curriculum

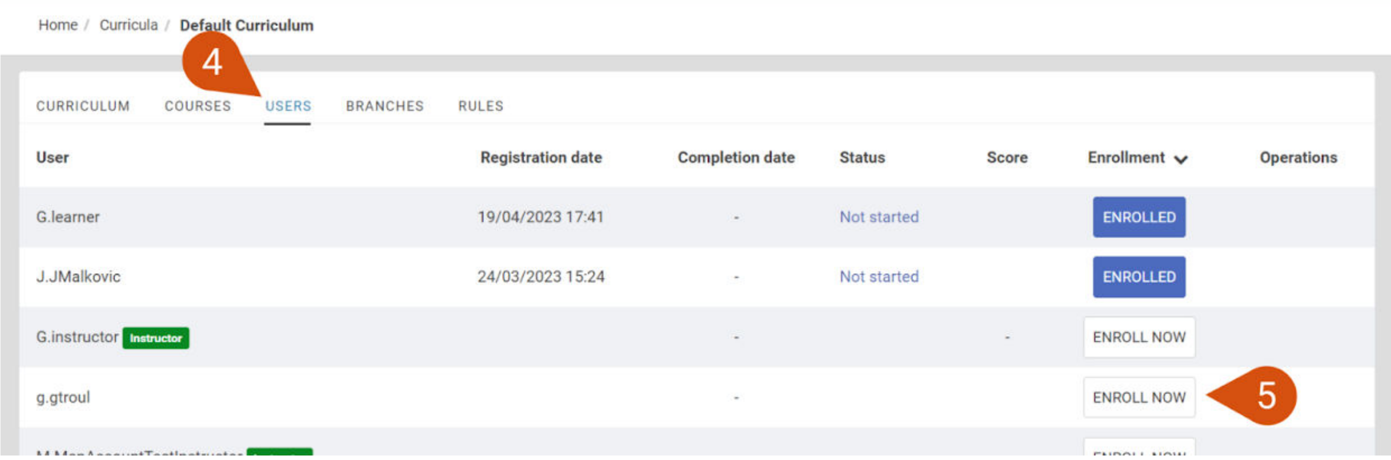
When editing a curriculum, you can edit all the settings we have described above under the **Curriculum (1)** tab.



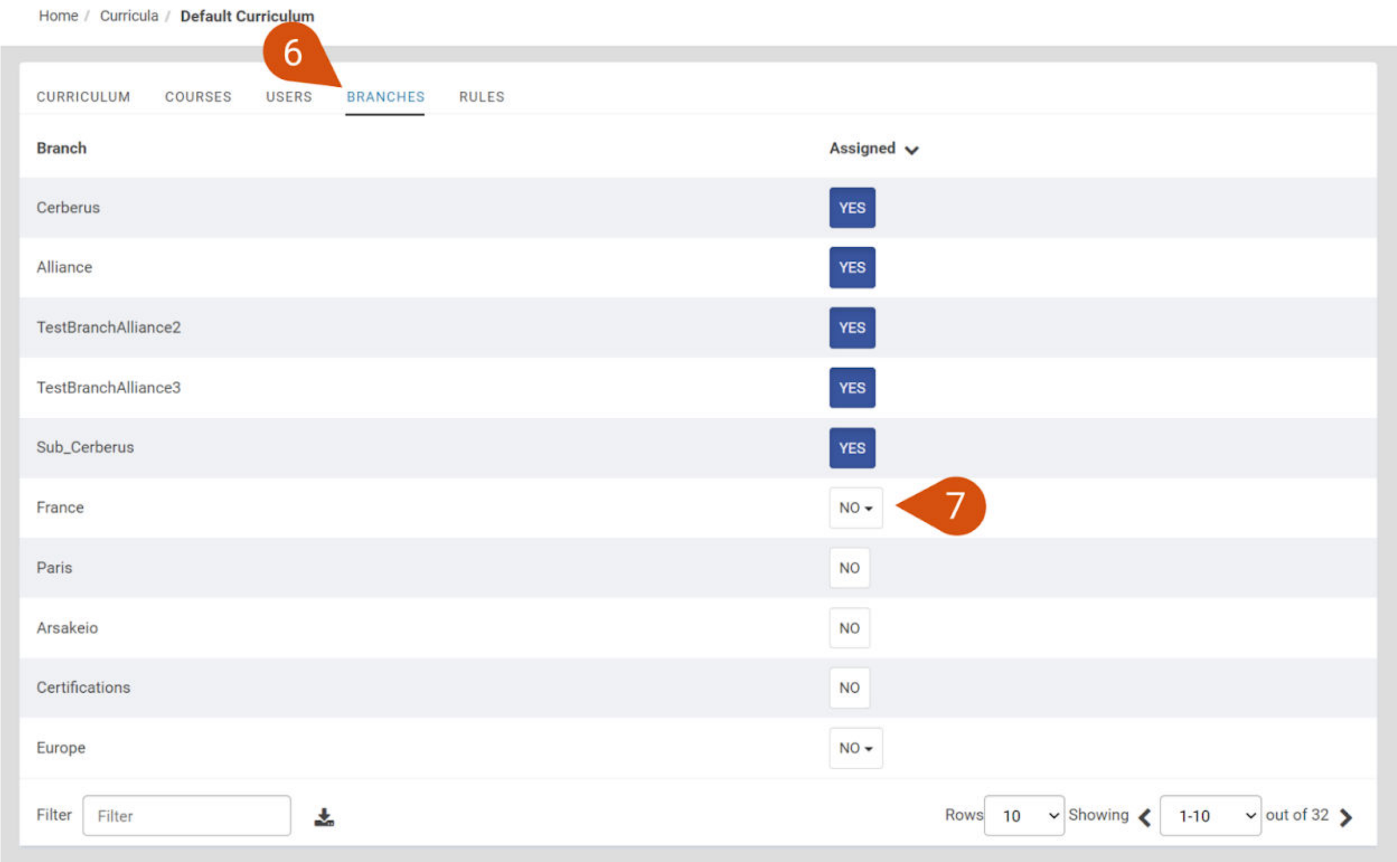
You also need to select the courses that are going to be a part of this curriculum, along with whether each course is mandatory or optional for the curriculum. You can do so by going to the **Courses (2)** tab and click **"No"**, changing it to **"Yes" (3)**.



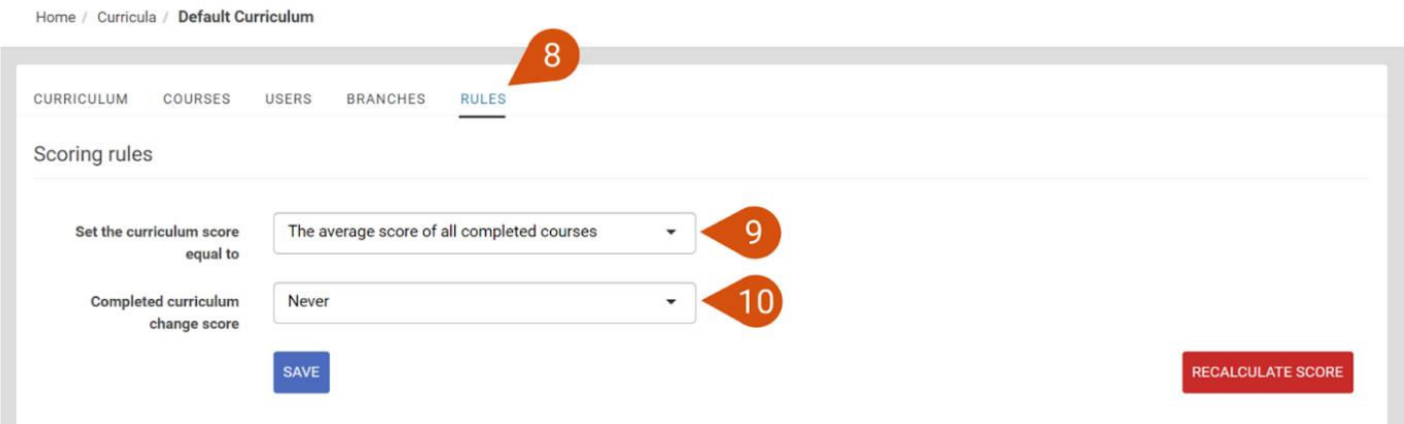
Moreover, you can manually manage the users of this curriculum by enrolling or removing Learners from the **Users (4)** list. To do so, click **"Enrol Now" (5)**.



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



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"**.

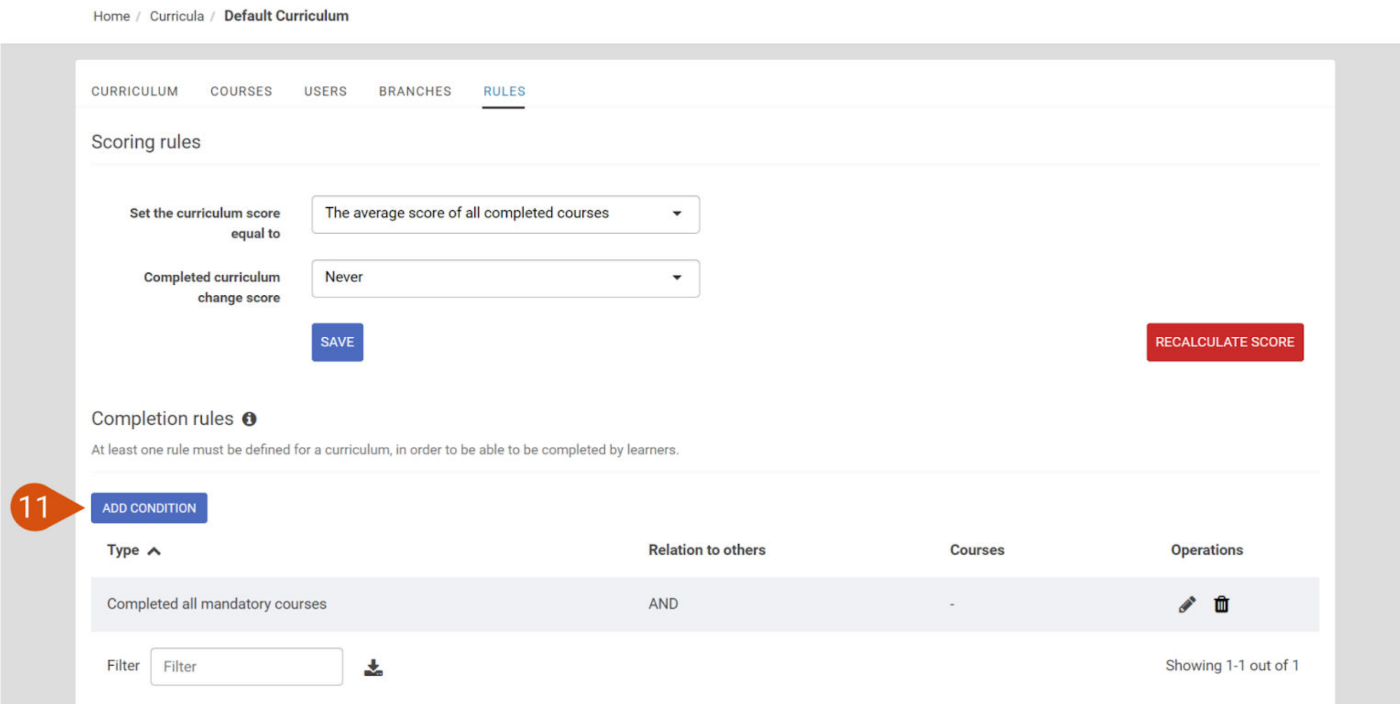


Change the Curriculum scoring rule by expanding the **"Set the curriculum score equal to" (9)** and select one of the available curriculum scoring rules:

- 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**

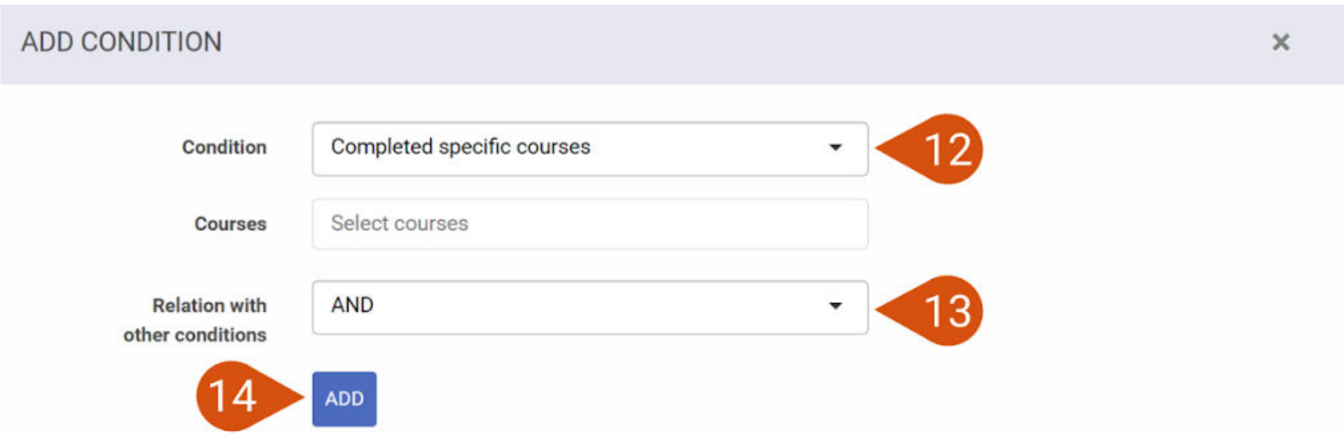
Under Completion rule, you will find a list of all the conditions that have already been set (if any) to complete this curriculum. To set a new condition, click the **"Add Condition" (11)** button and set a new condition and its relation to other conditions.



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.

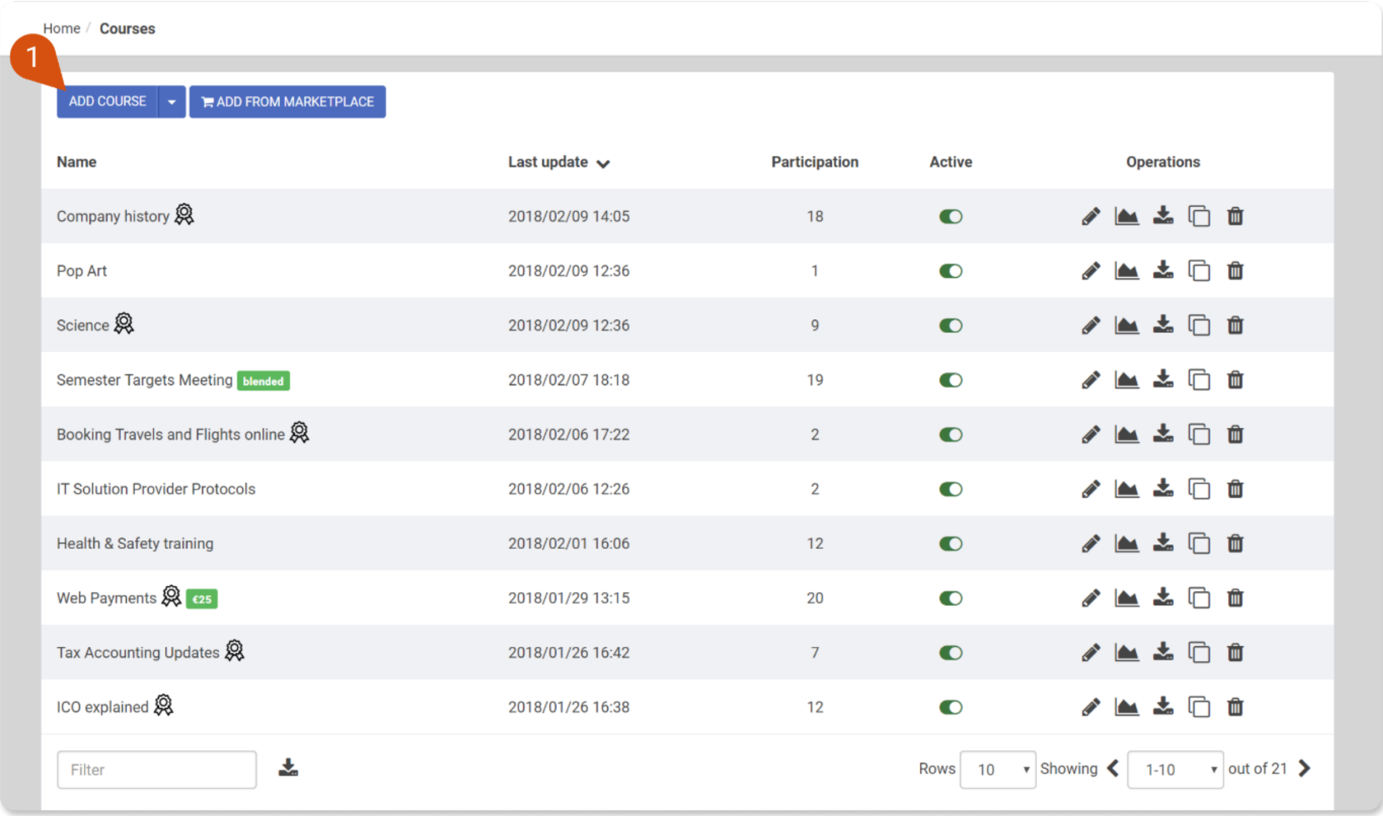
The **"Relation with other conditions" (13)** drop-down menu offers two options: **"And"** and **"Or"**. Conditions that are set to "And" must all be met by the user for the course to be considered "completed". On the other hand, out of all the conditions that are set to "Or", only one must be met by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



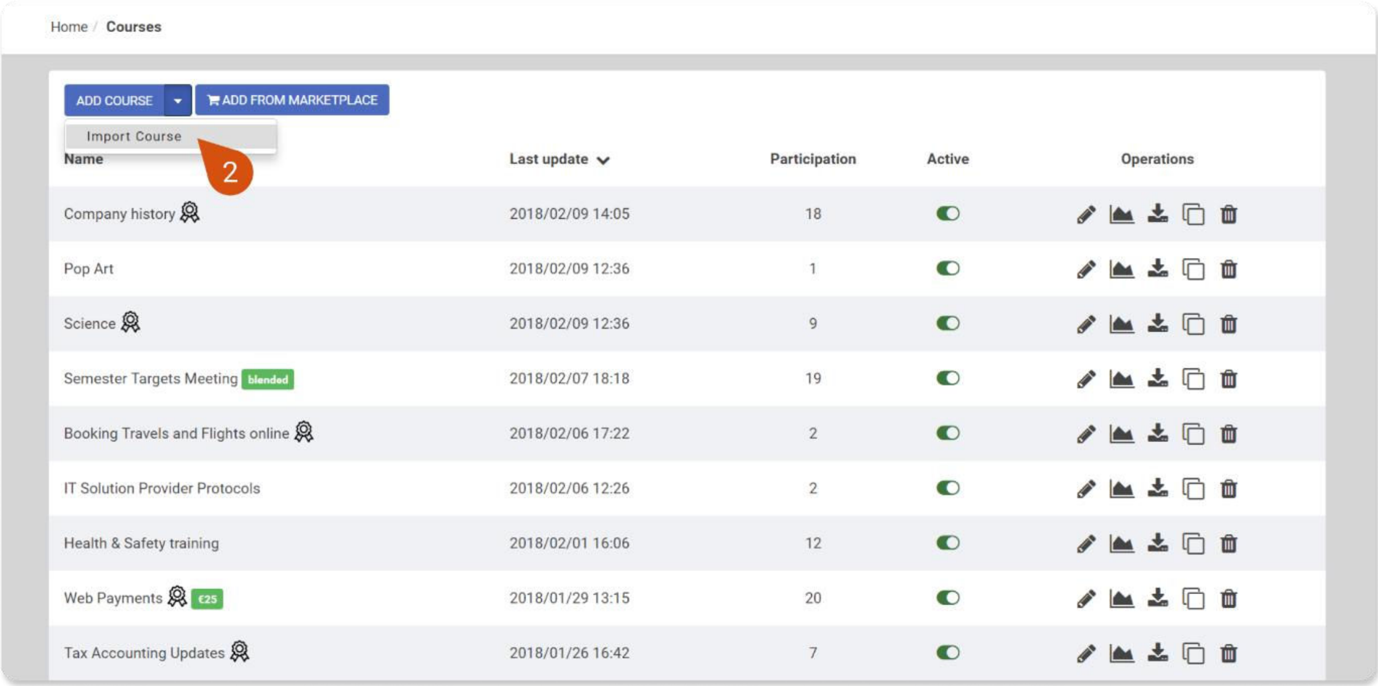
How to Add Courses and Add/Edit Course Content

Adding a new course:

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

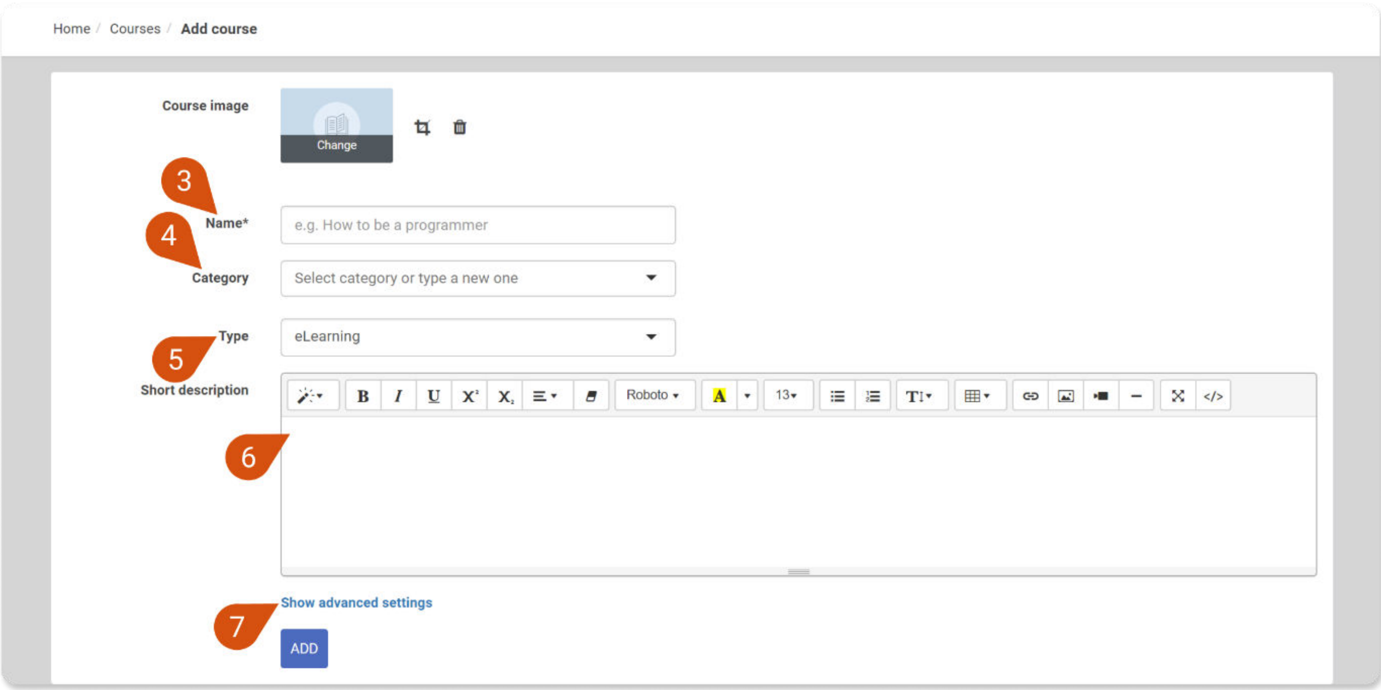


Another way to add a new course is to import an already exported one. Click the downward arrow next to the “Add course” button **(2)**.



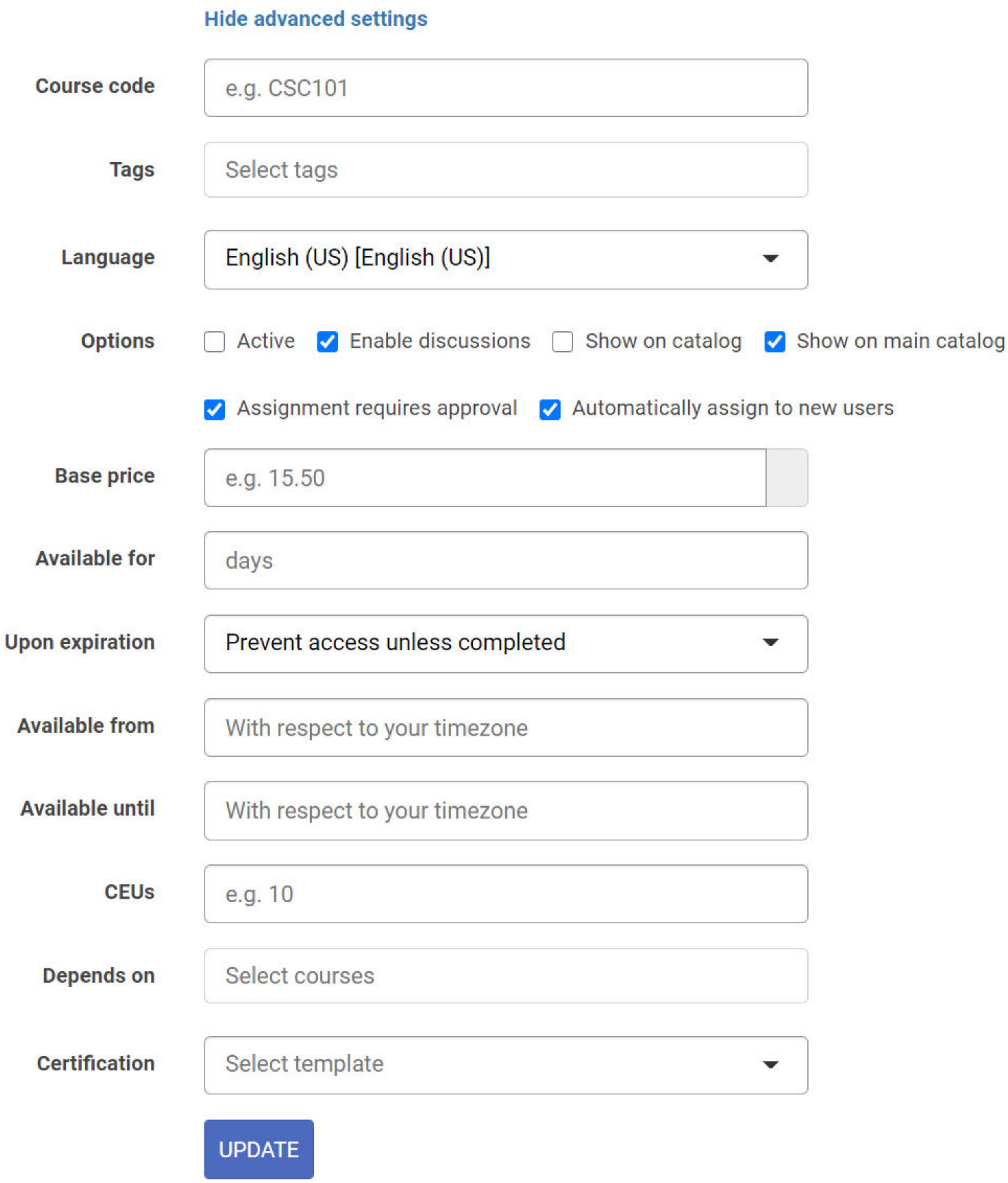
Note: *When you import a blended learning course, the imported file will not include training sessions.*

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



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)**.



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

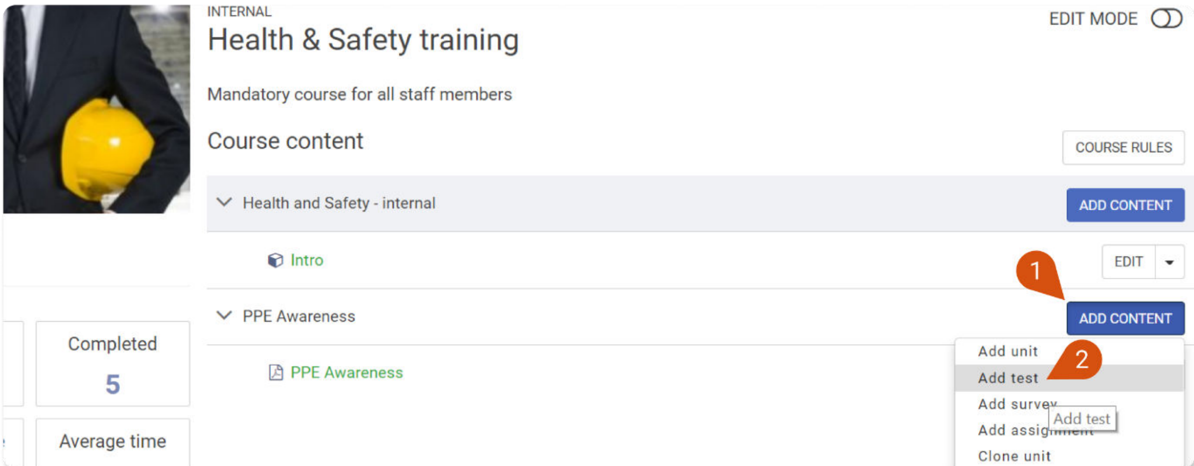
Note: *You can also add custom fields when adding a Course, which you can create in the Extend Profile section.*

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

When done, click Add.

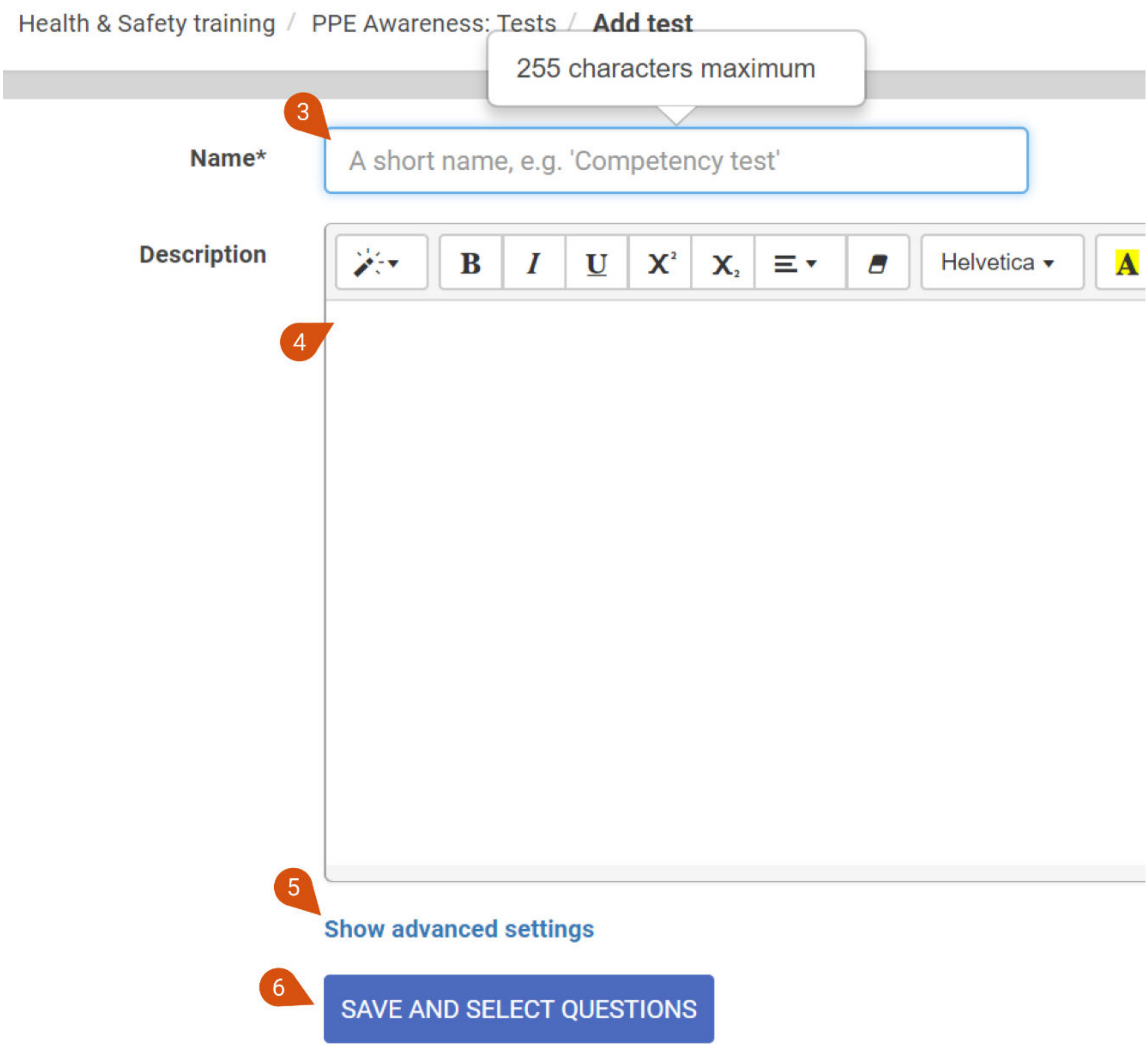
Adding a Test to a Course

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.

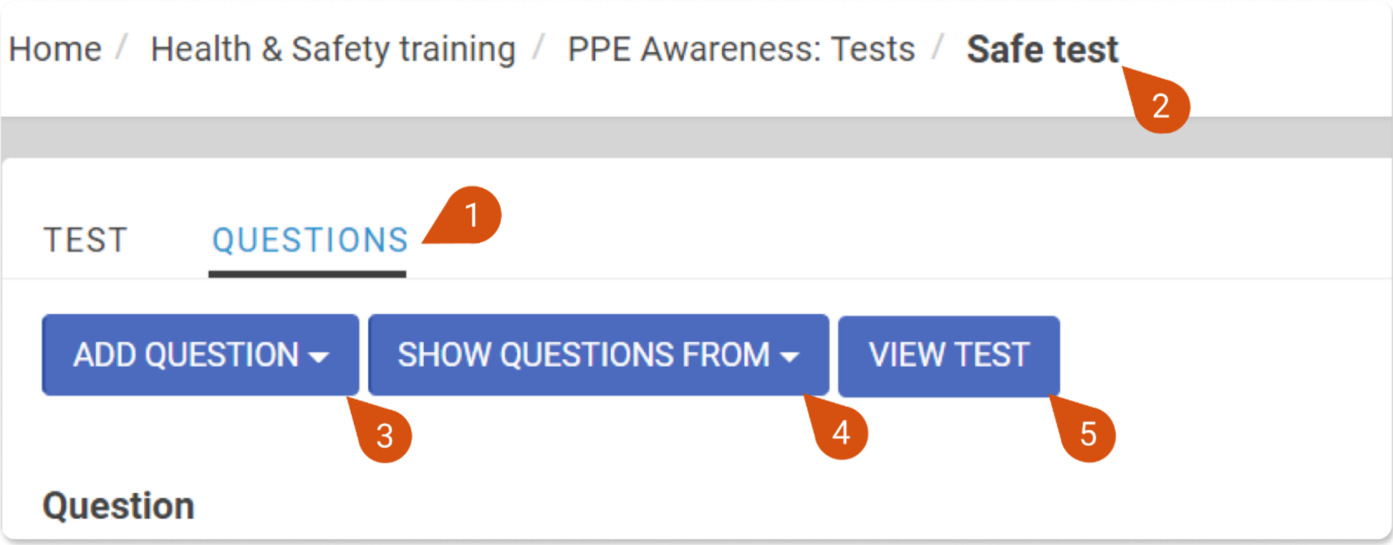
After signing in as the course's owner, go to the "Add test" page and start by typing a title **(3)** for the new test unit in the "Name*" field (this step is required). Then, you can add a description for your test **(4)** and click on the "Show advanced settings" **(5)** link to further customize your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

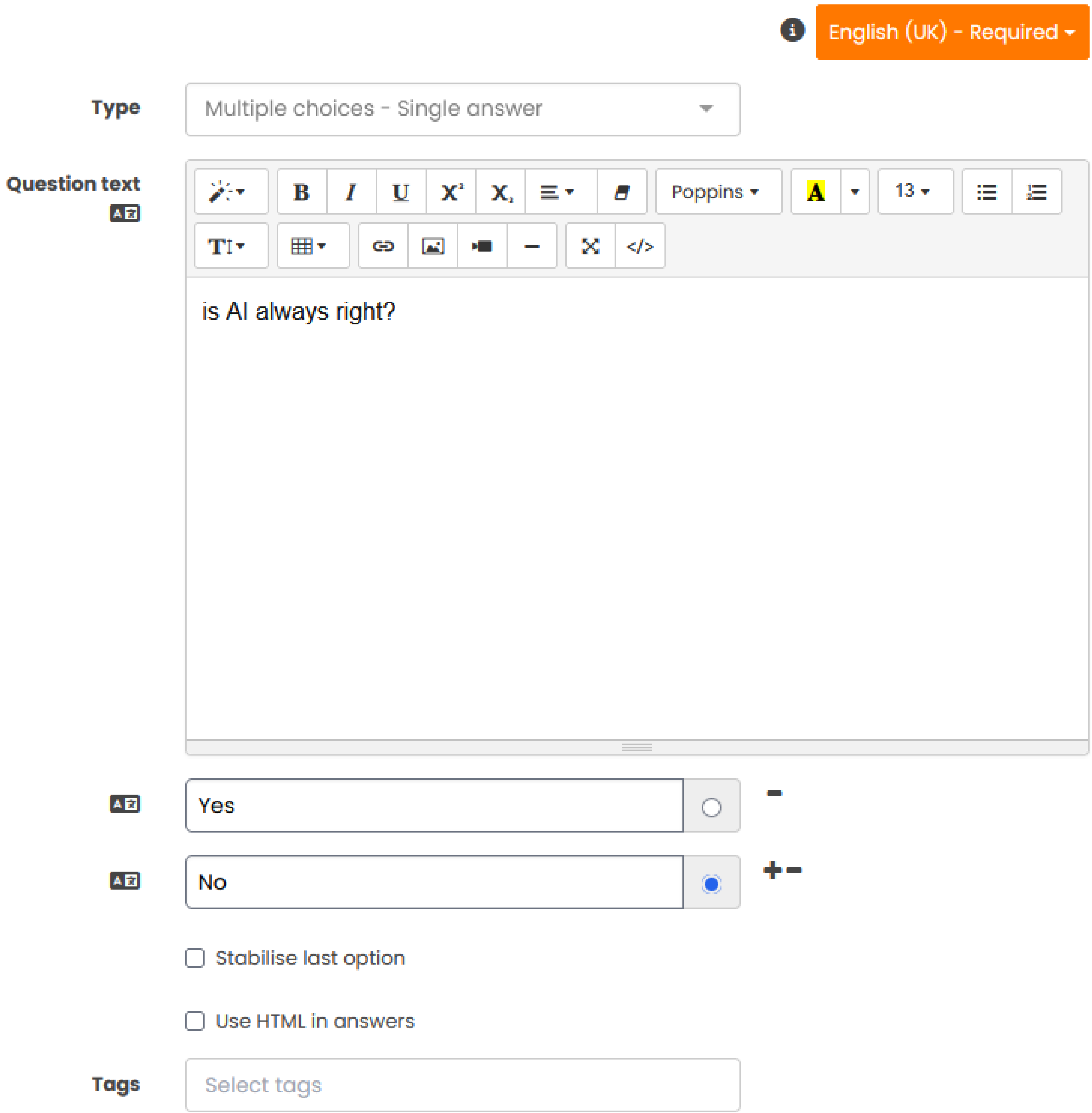


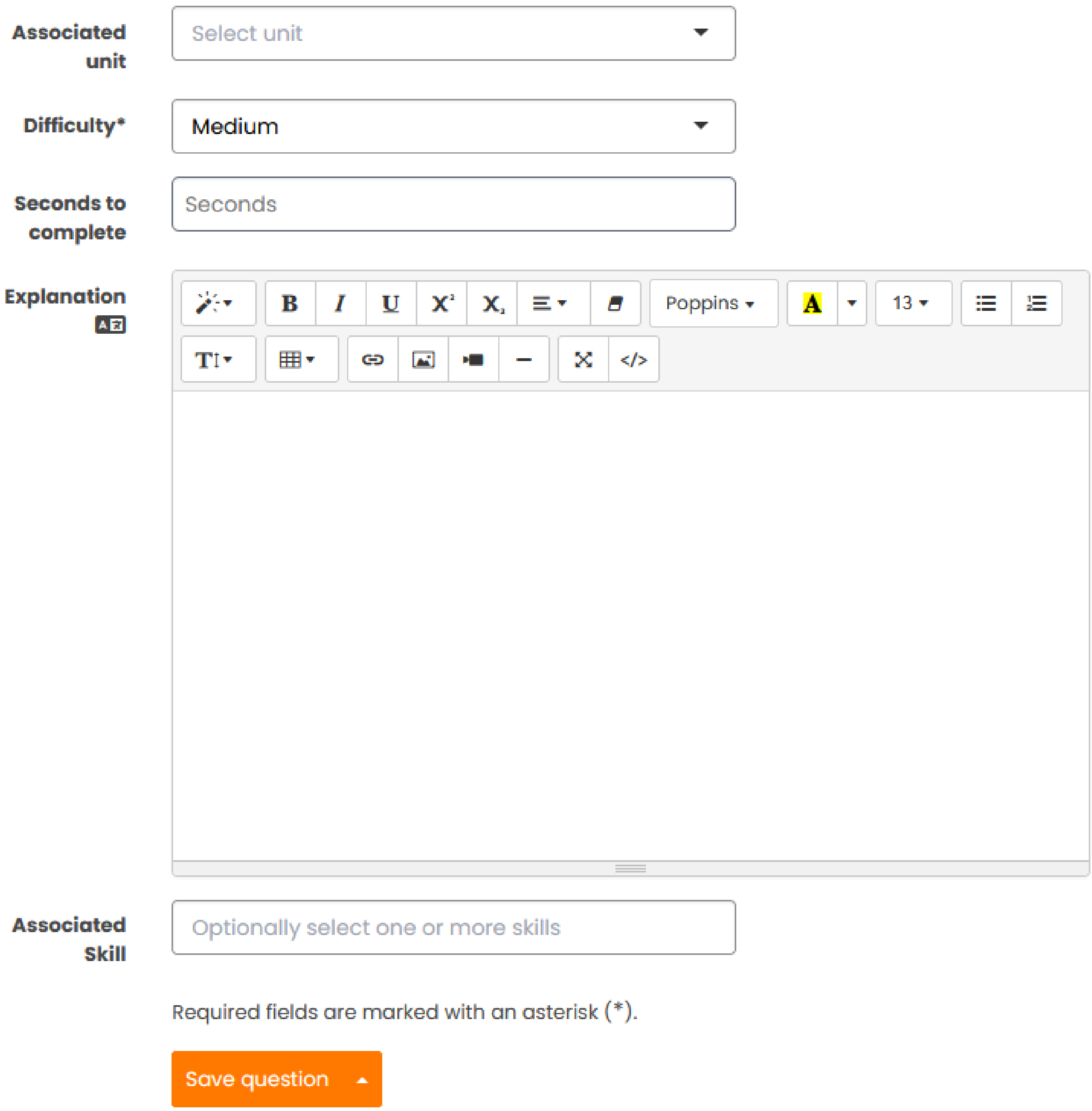
Once you are done, click on the "Save and Select questions" **(6)** button.

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.


Home / Health & Safety training / PPE Awareness: Tests / Safe test
2
TEST
QUESTIONS
1
ADD QUESTION
SHOW QUESTIONS FROM
VIEW TEST
3
4
5
Question


English (UK) - Required
Type
Multiple choices - Single answer
Question text
Poppins
13
is AI always right?
Yes
No
Stabilise last option
Use HTML in answers
Tags
Select tags



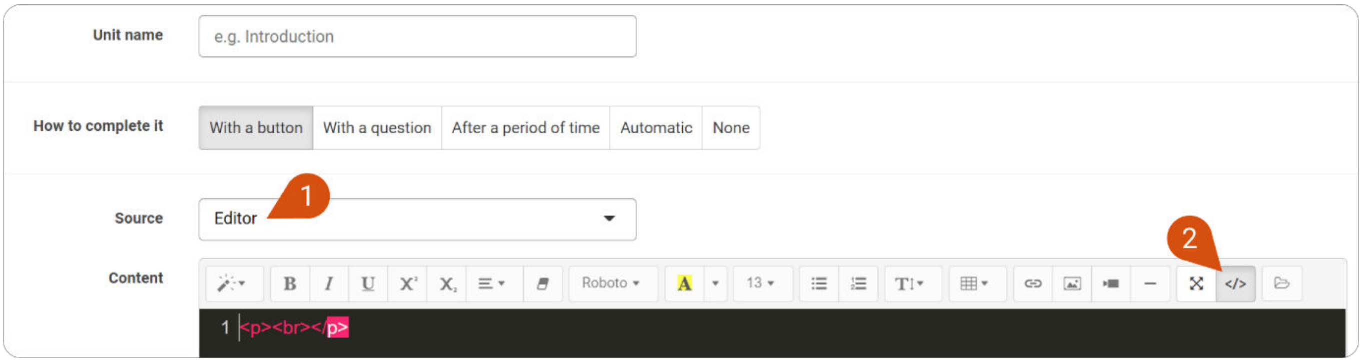
Edit course unit contents

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

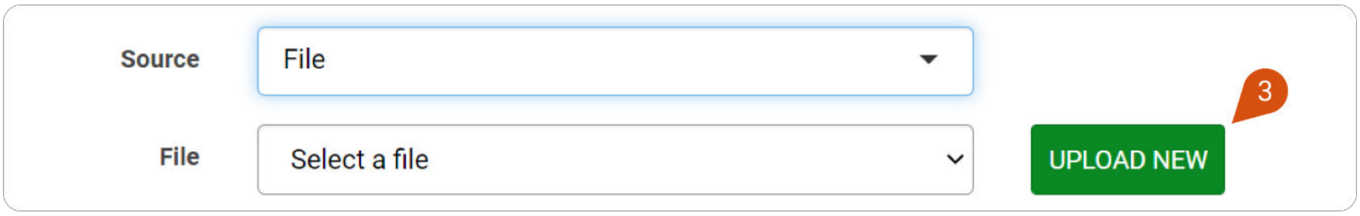
- H5P libraries can be added to and used within the H5P editor
- H5P content can then be created within the portal interface
- H5P units created elsewhere can be uploaded as a unit and then edited within the H5P editor.
- Finally, all H5P units created or uploaded can be exported from Pathway platform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

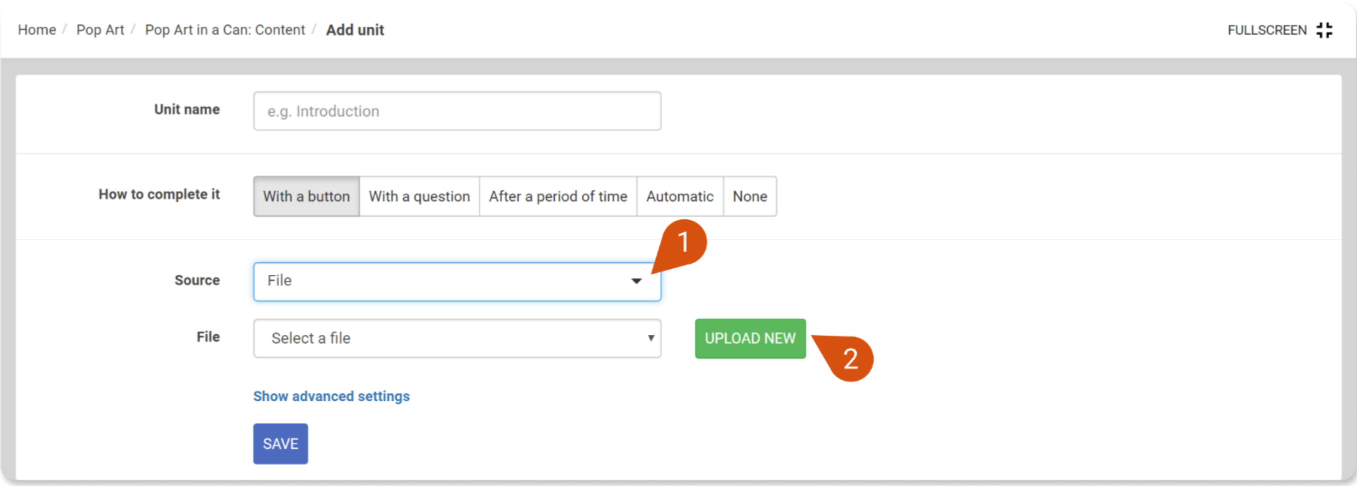
- Text files: they are shown on pages
- Video/Audio units: those have their own completion methods and options
- ZIP packages: when recognized as SCORM/xAPI and AICC, they will have their specific settings
- PDF files: This offers two specific options. You can either "hide the download button" or "hide 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.

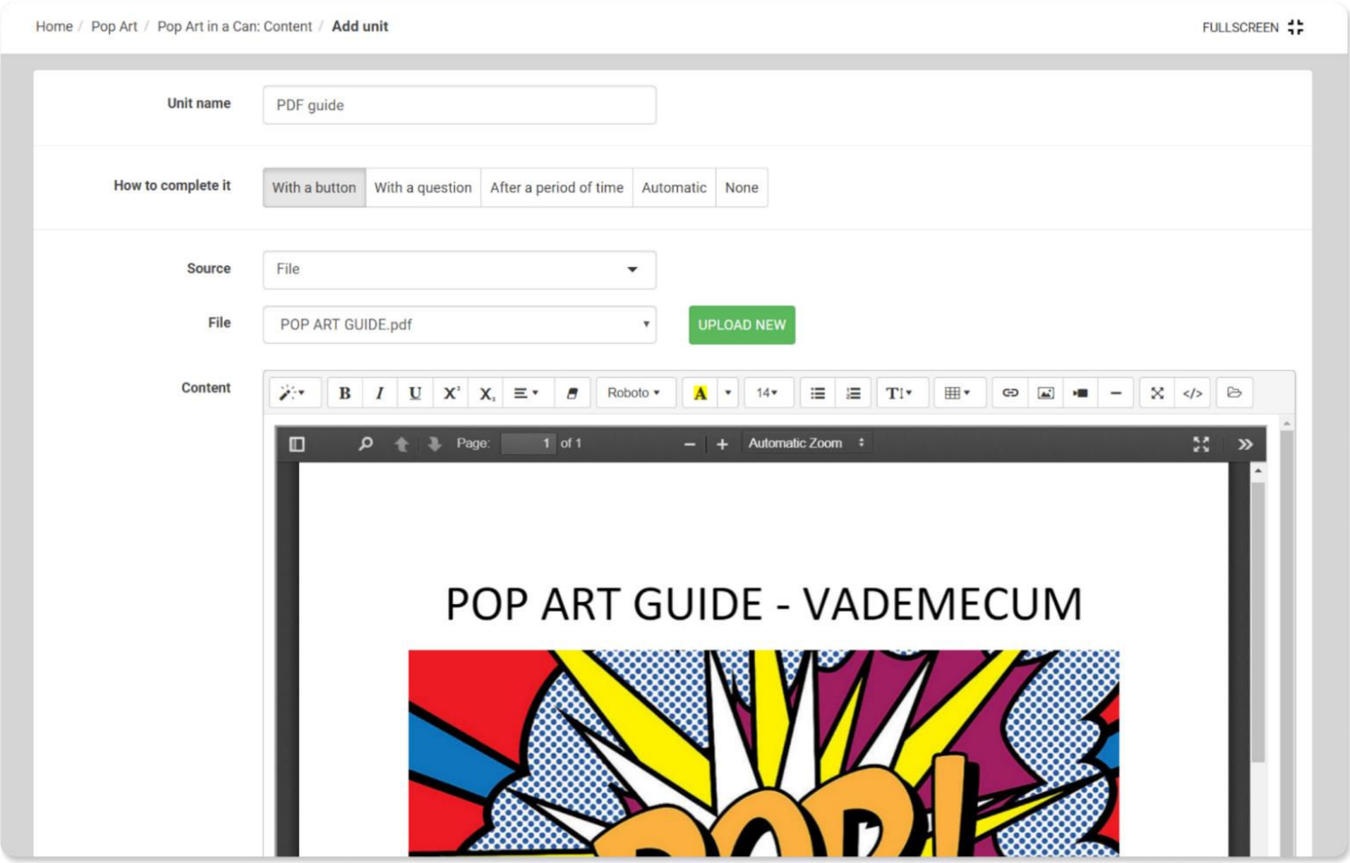


Click the source field, choose "File" from the drop-down menu **(1)**, and then click "Upload New" **(2)**.

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.

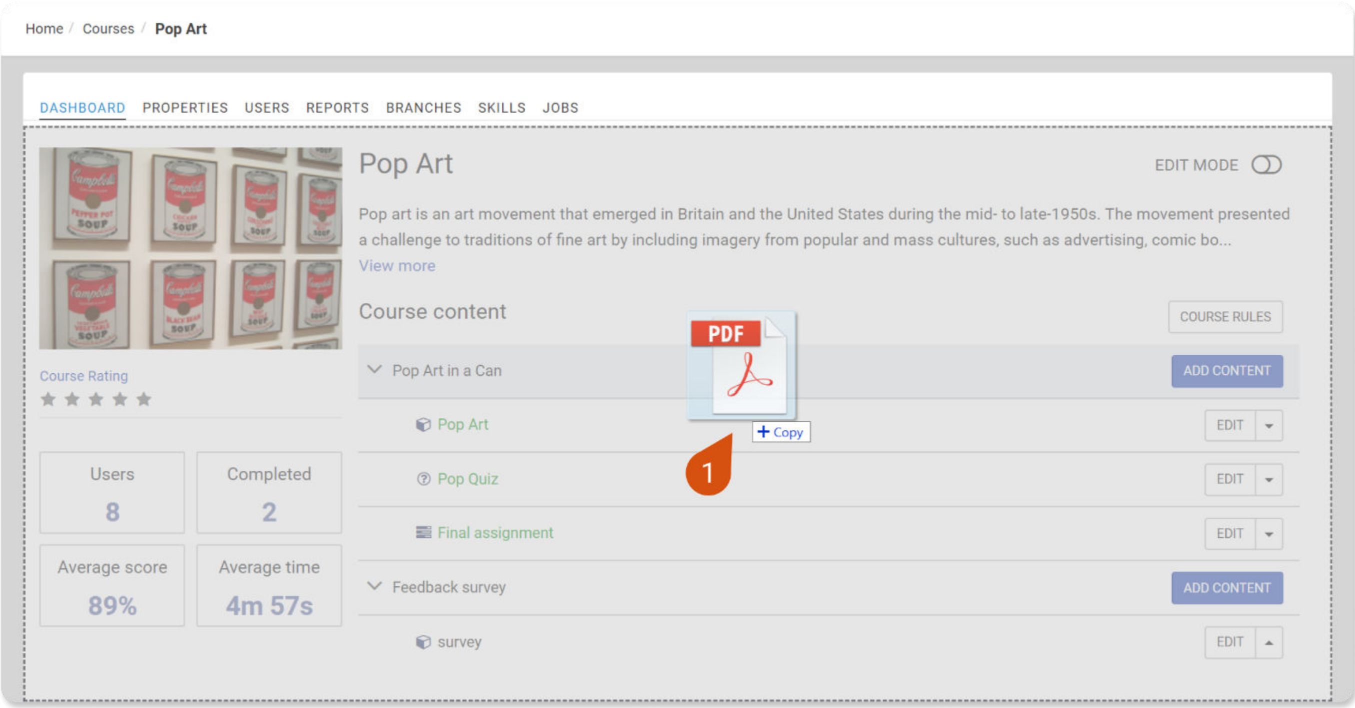
Note: *For content such as SCORM/xAPI and AICC the default completion method is automatically set to 'None' as these content types have their own internal completion rules*



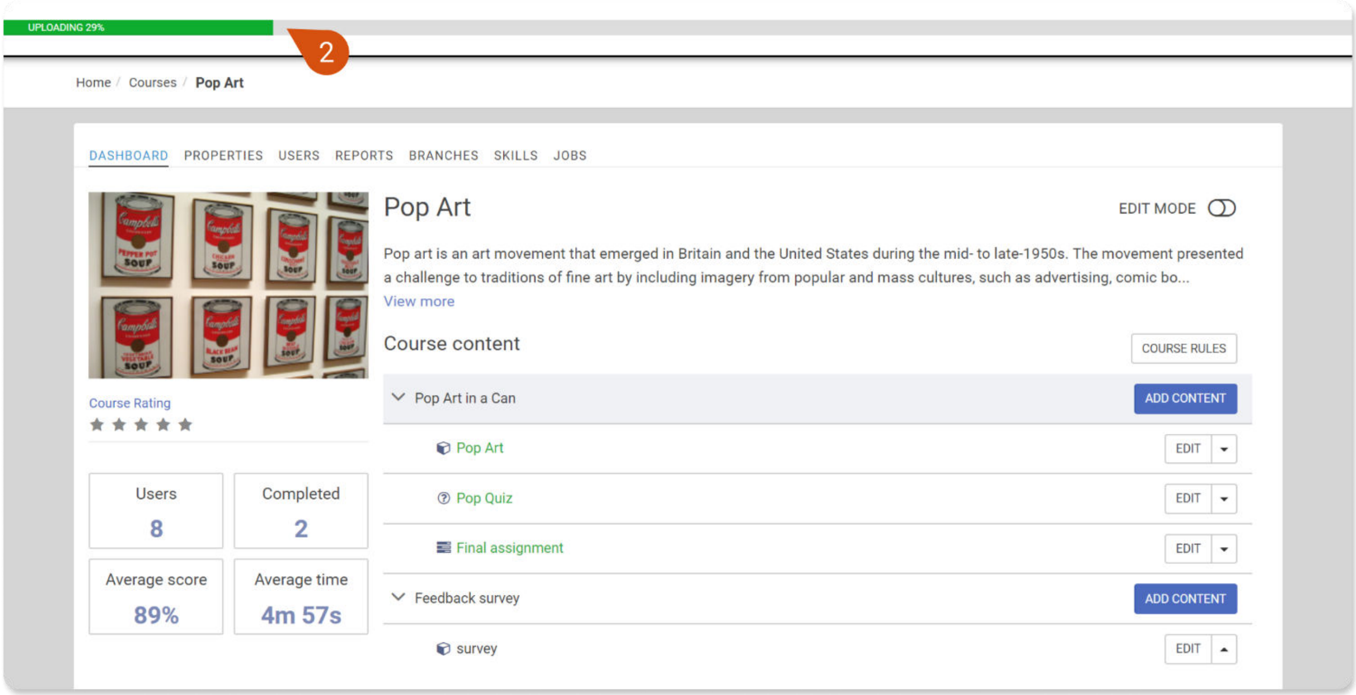
Based on the file type, learners will either see an embedded version of it or will need to click a link to open or download it.

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)**:

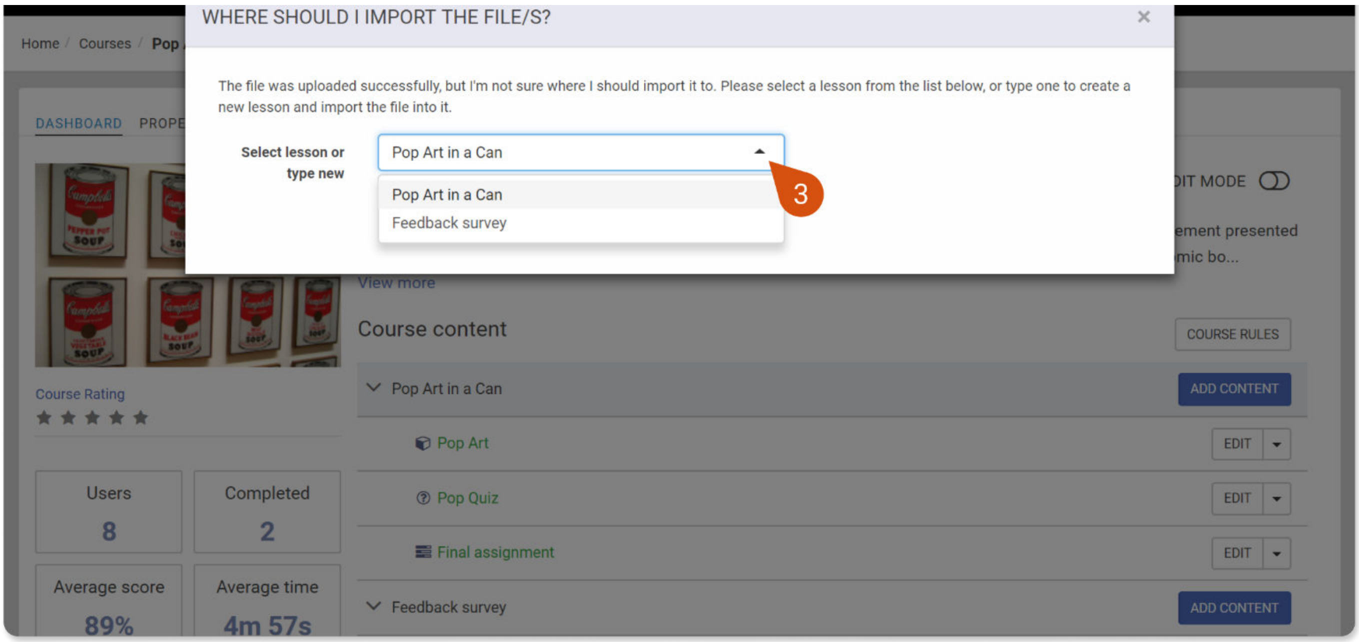


A file upload progress bar will appear at the top of the page **(2)**.



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.

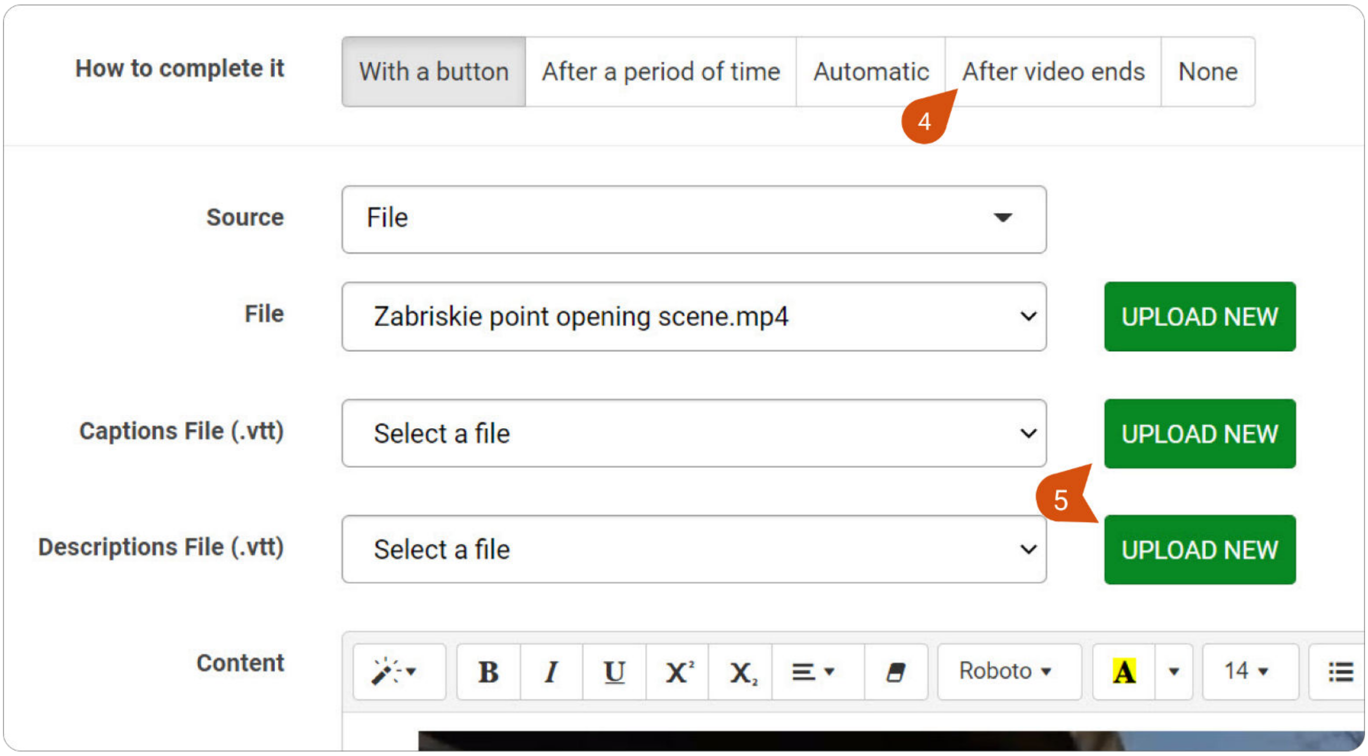
If your course has more than one Lesson library, you will see a message asking you to choose the library you want the new file unit to go to **(3)**. You can even type the name of a new lesson to create it at this point.



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

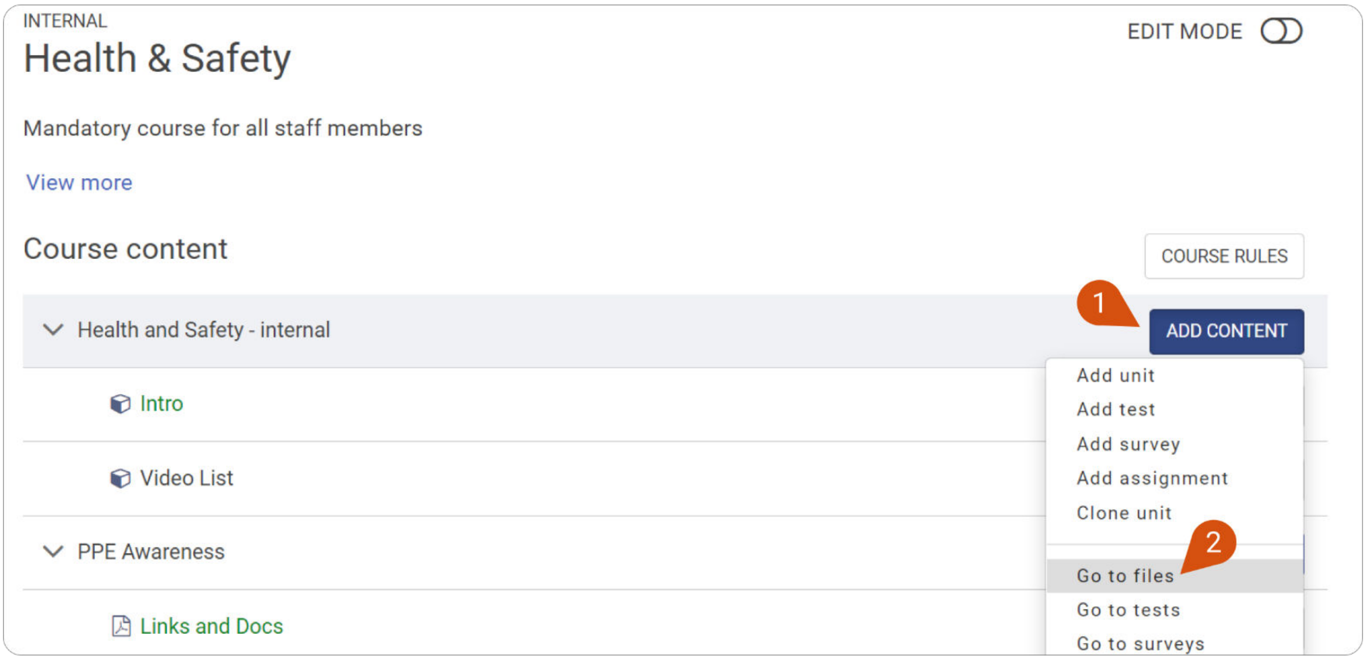
*You can choose "**After video ends" (4)** as a completion method, urging learners to watch the whole video before they move to the next unit*

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



Lesson files

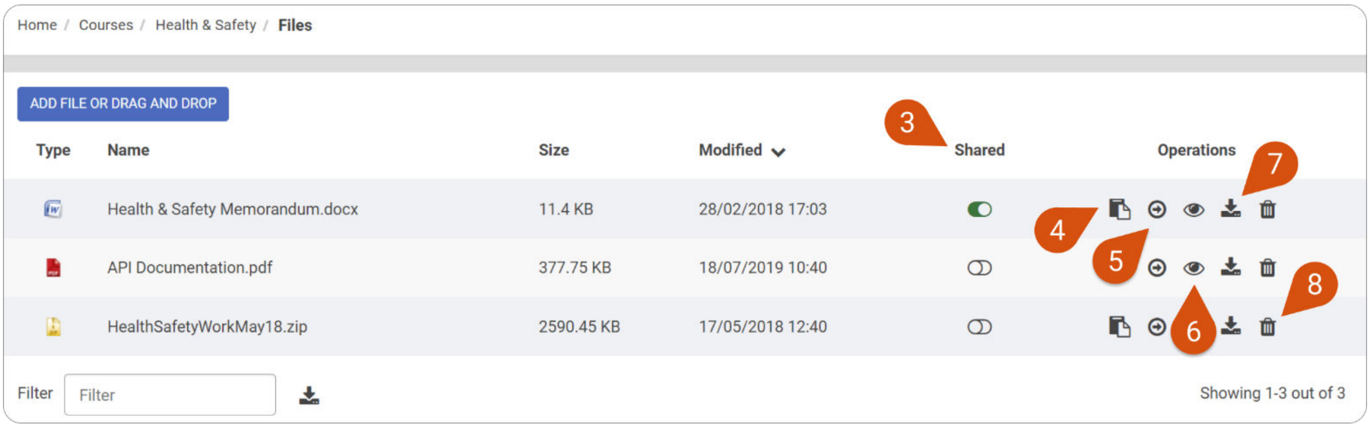
To view all files used to create units in each lesson, click **Add Content (1)** next to the lesson's name, and then click **Go to files (2)**.



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



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

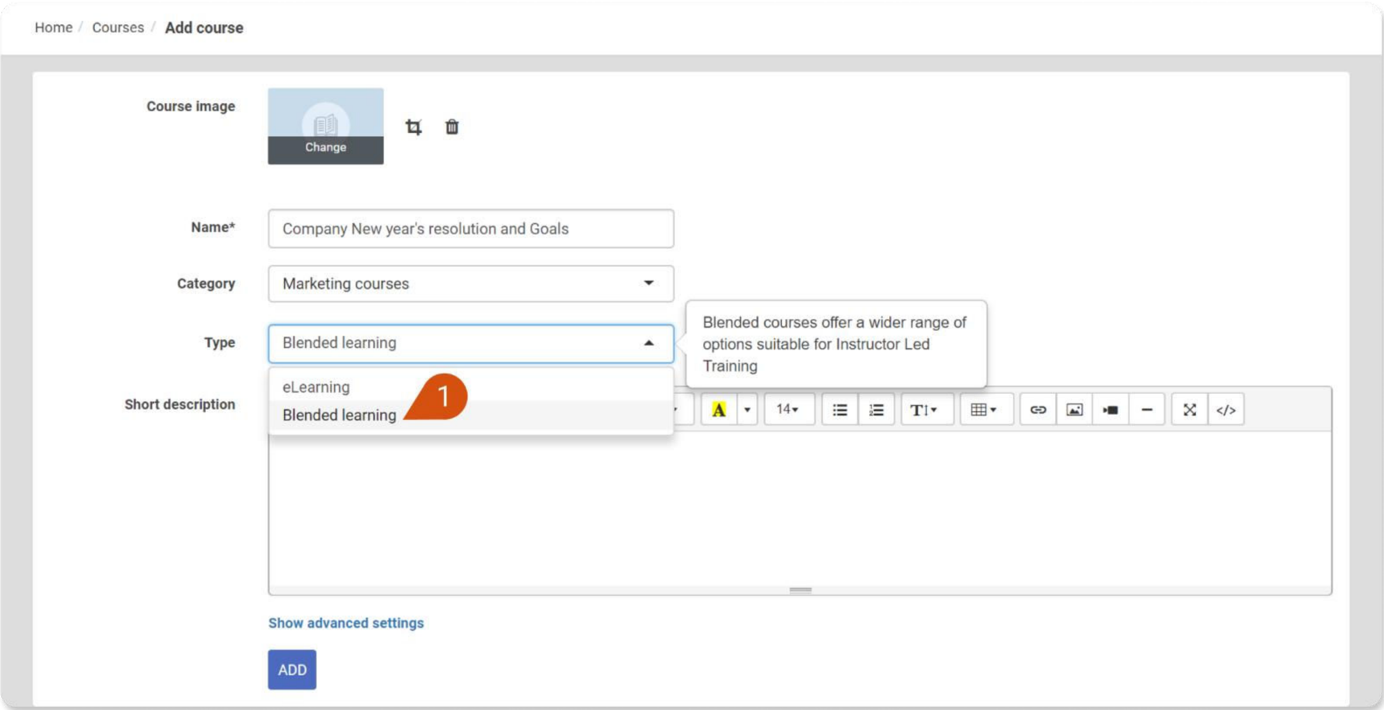
A training **Event** is an entity that represents a training that happens in the physical world.

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.

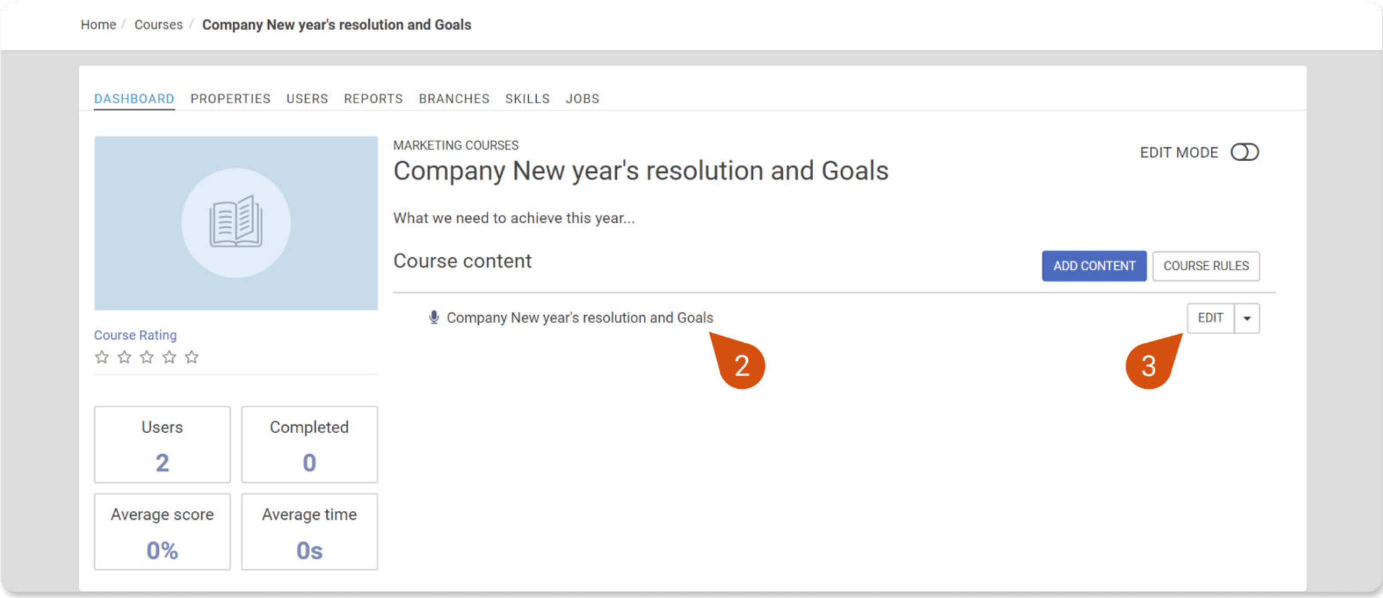
A **Course** is a collection of lessons and/or training events. The user can buy/enroll to the course

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.

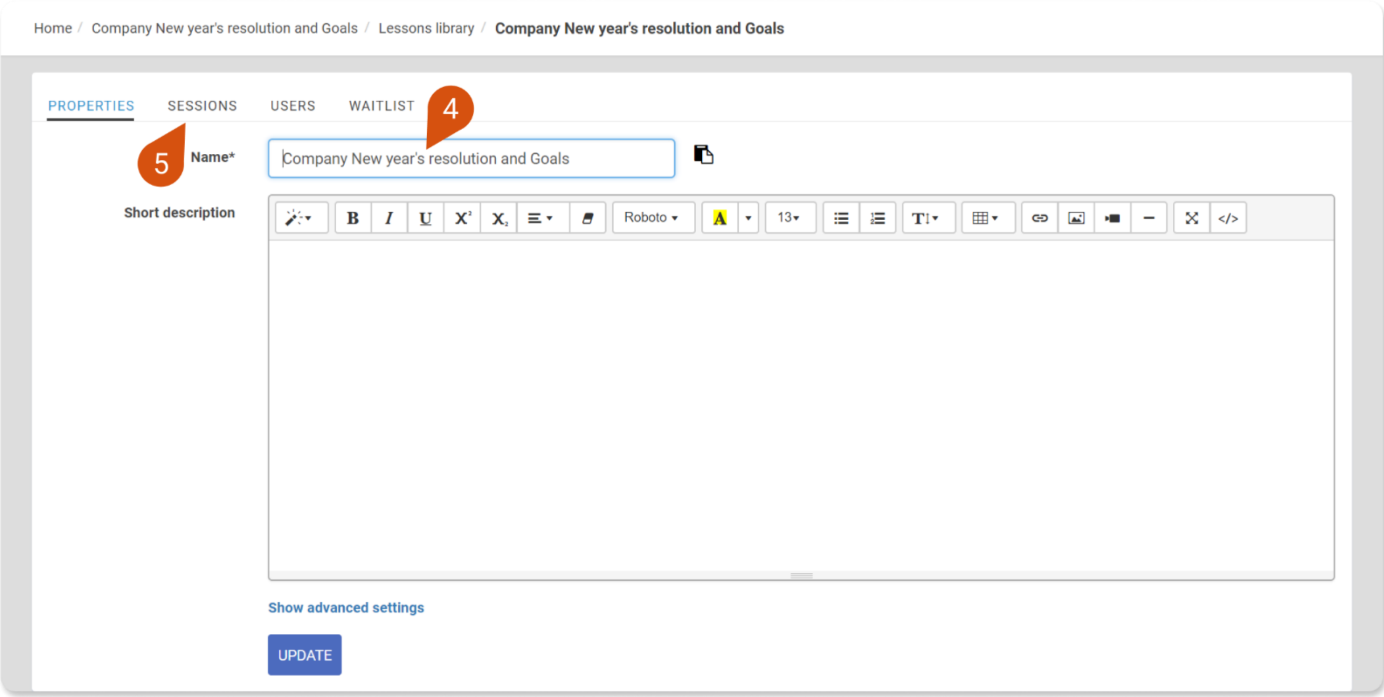


After creating the course, you will be directed to the course's dashboard tab and you will notice that a training event with the same name as the course, is automatically added **(2)**.

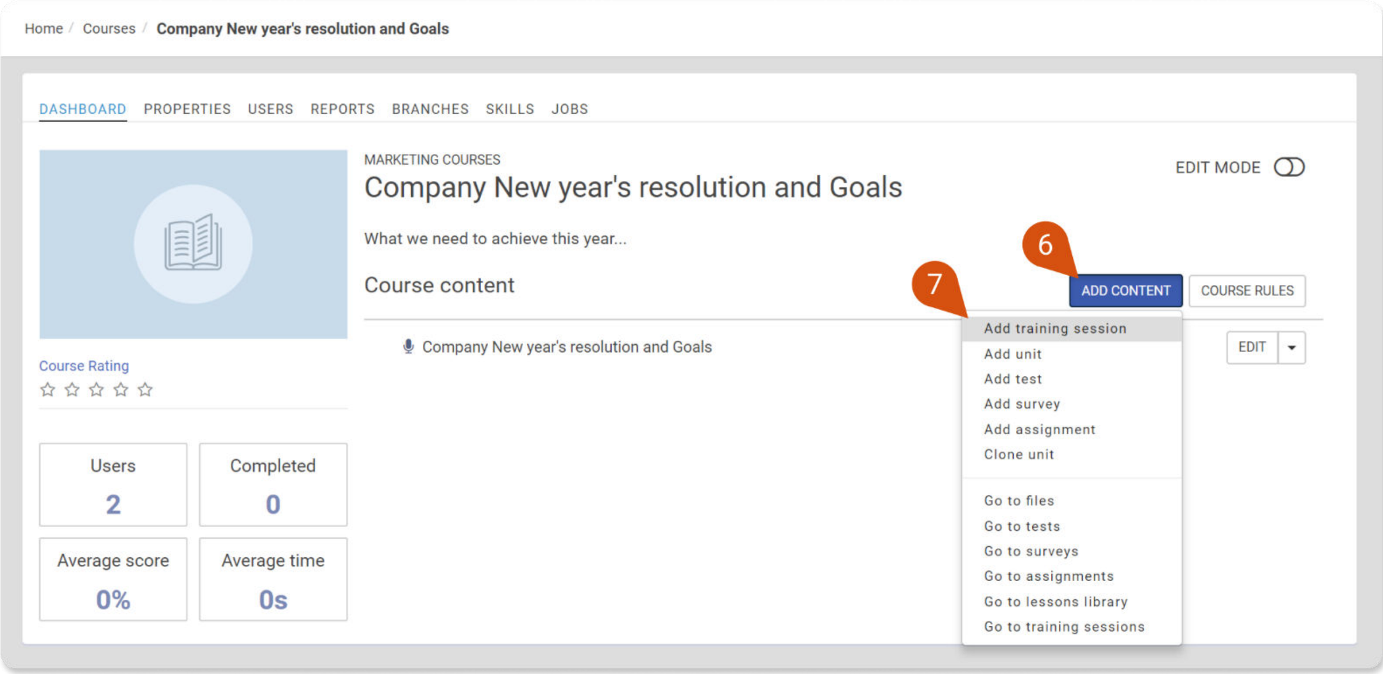
Clicking on the Edit button you can edit your first event **(3).**



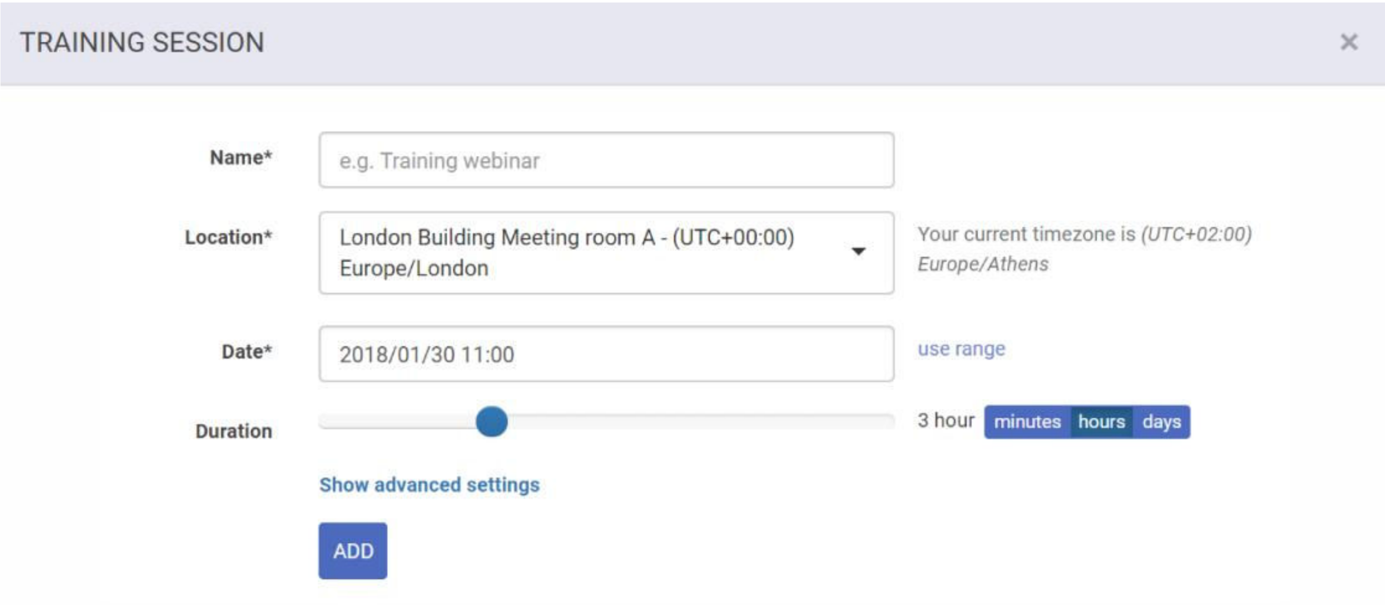
Through this page, you can edit the Event's title **(4)**, add a description and move to the Sessions tab in order to add new sessions to it **(5)**. So far, you have created a new blended learning course with one training event that has no sessions yet. The next step is to add training sessions.



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)**.



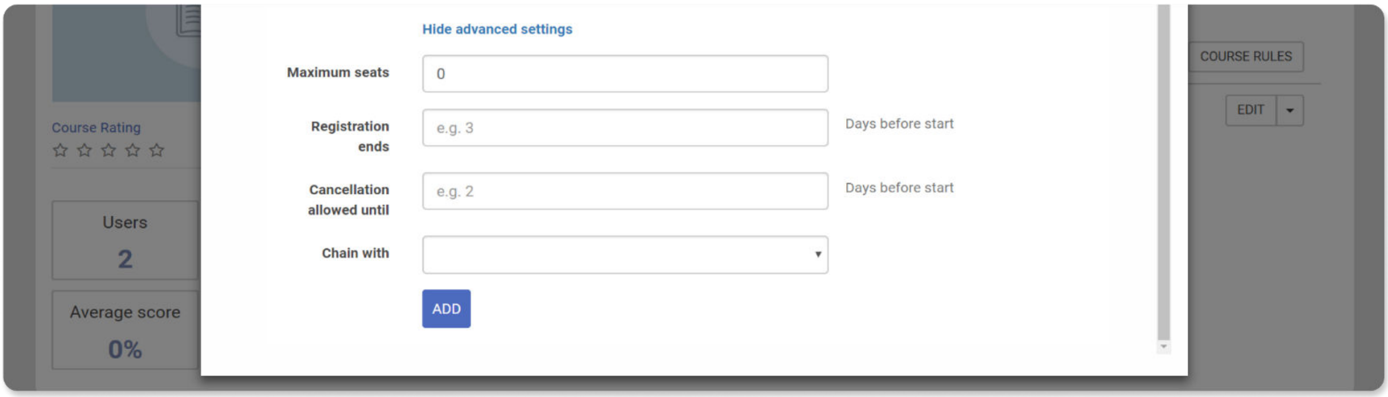
In order to add a new session, you have to type its name, select the location where it will take place, specify the date and the duration.



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

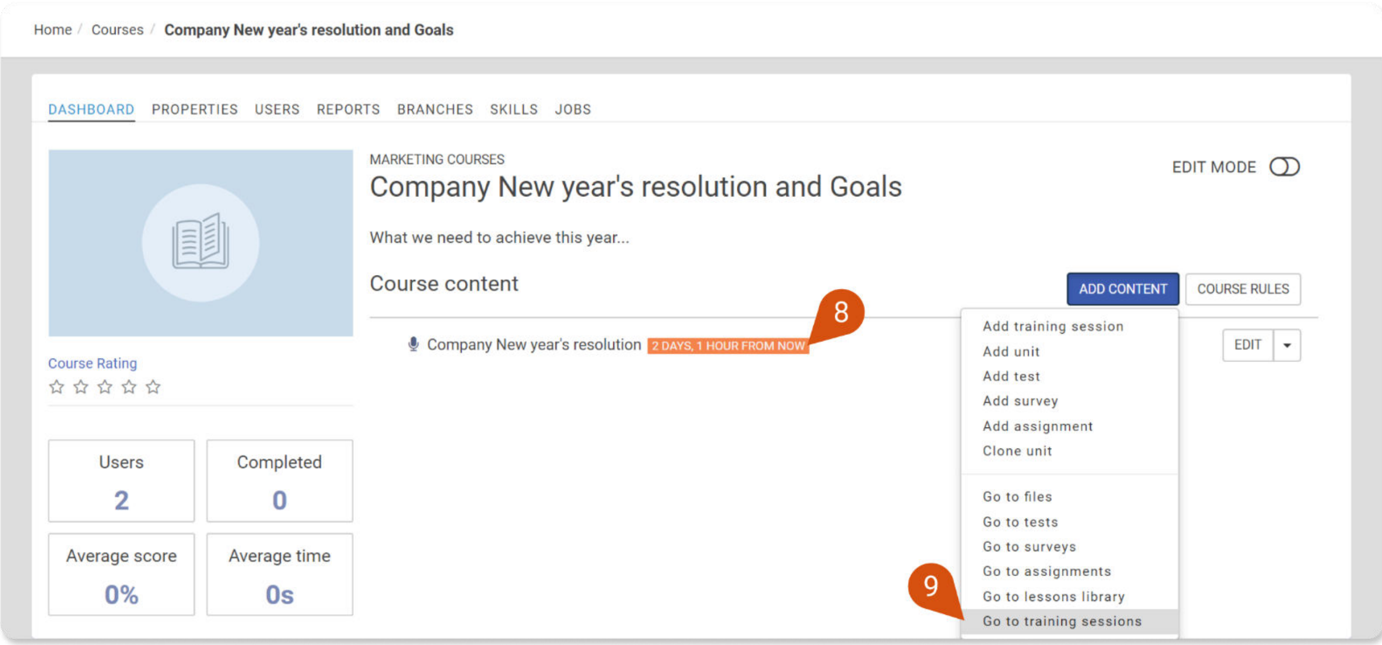
Apart from these basic settings that you can set up for the training sessions, there are some advanced settings available. You can set up:

- 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

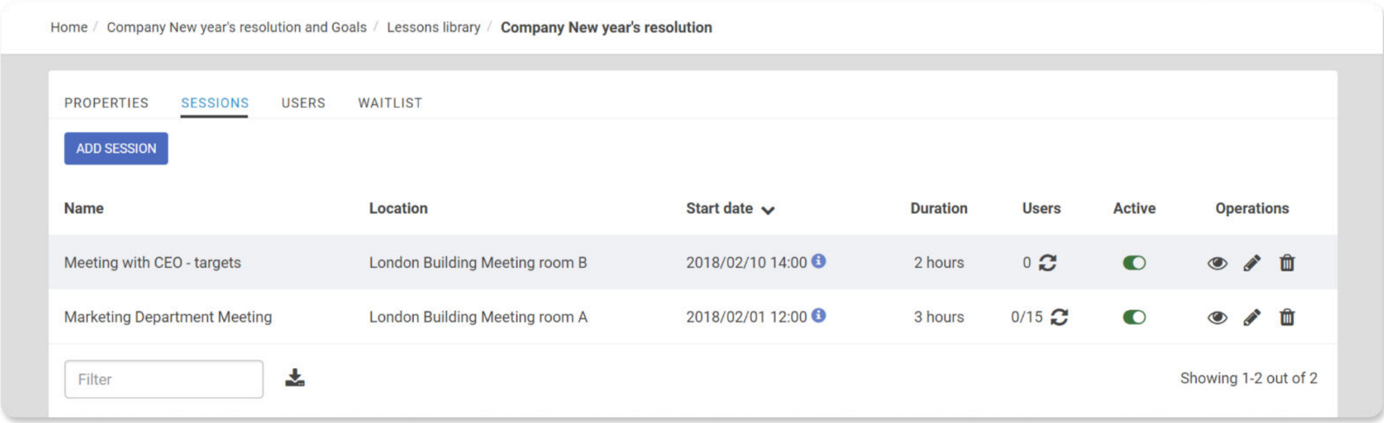


As we already mentioned in the beginning, an event can have more than one sessions. In order to add another session to the same event, you have to follow the same steps.

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.

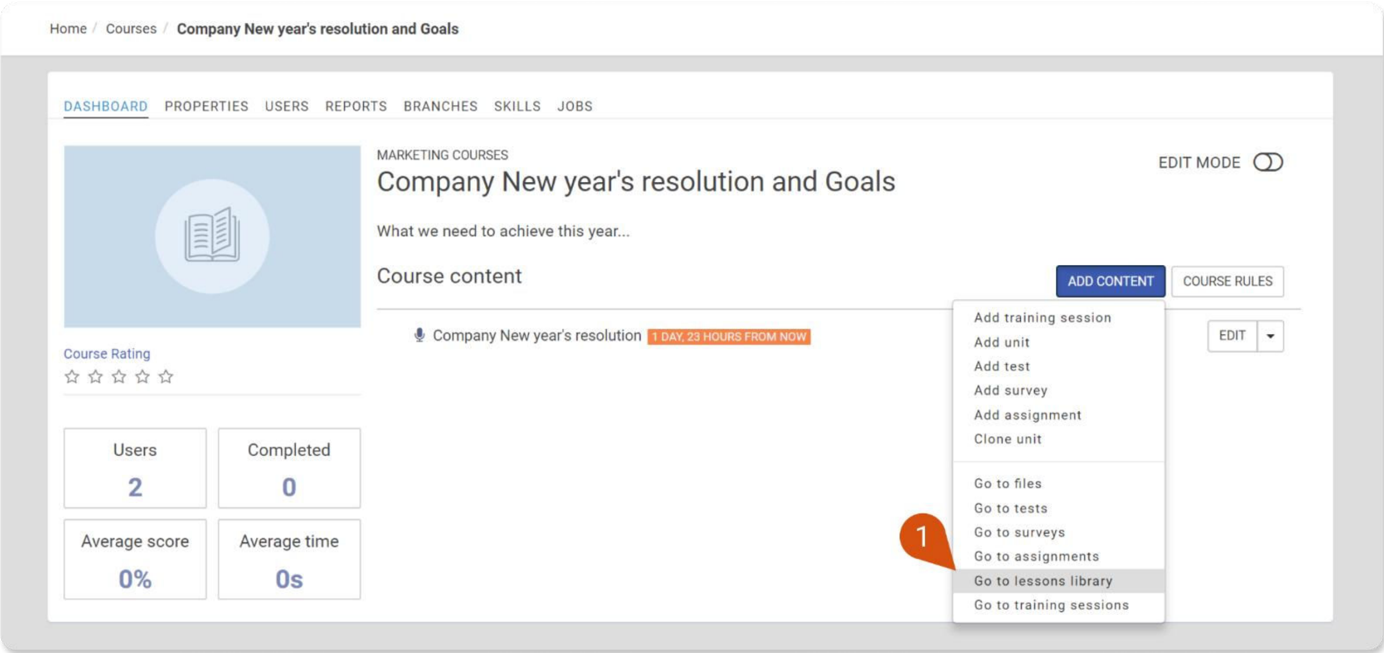


In order to access the event' sessions and edit them, you can click on the Content button and then Go to training sessions **(9).** Through this page, you can see the list of the sessions along with some information about them, for example how many users have registered to them.

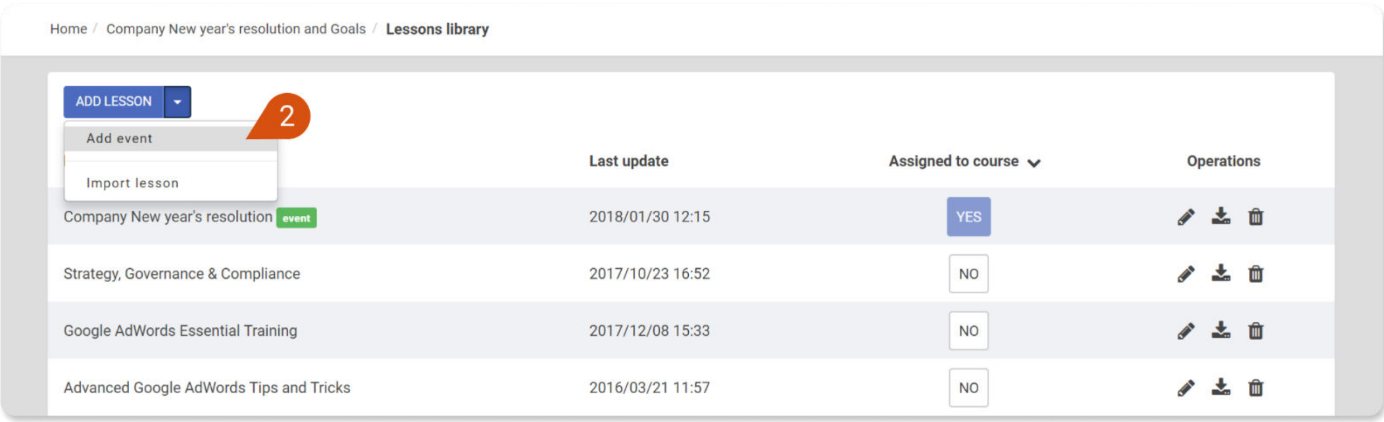


Adding events

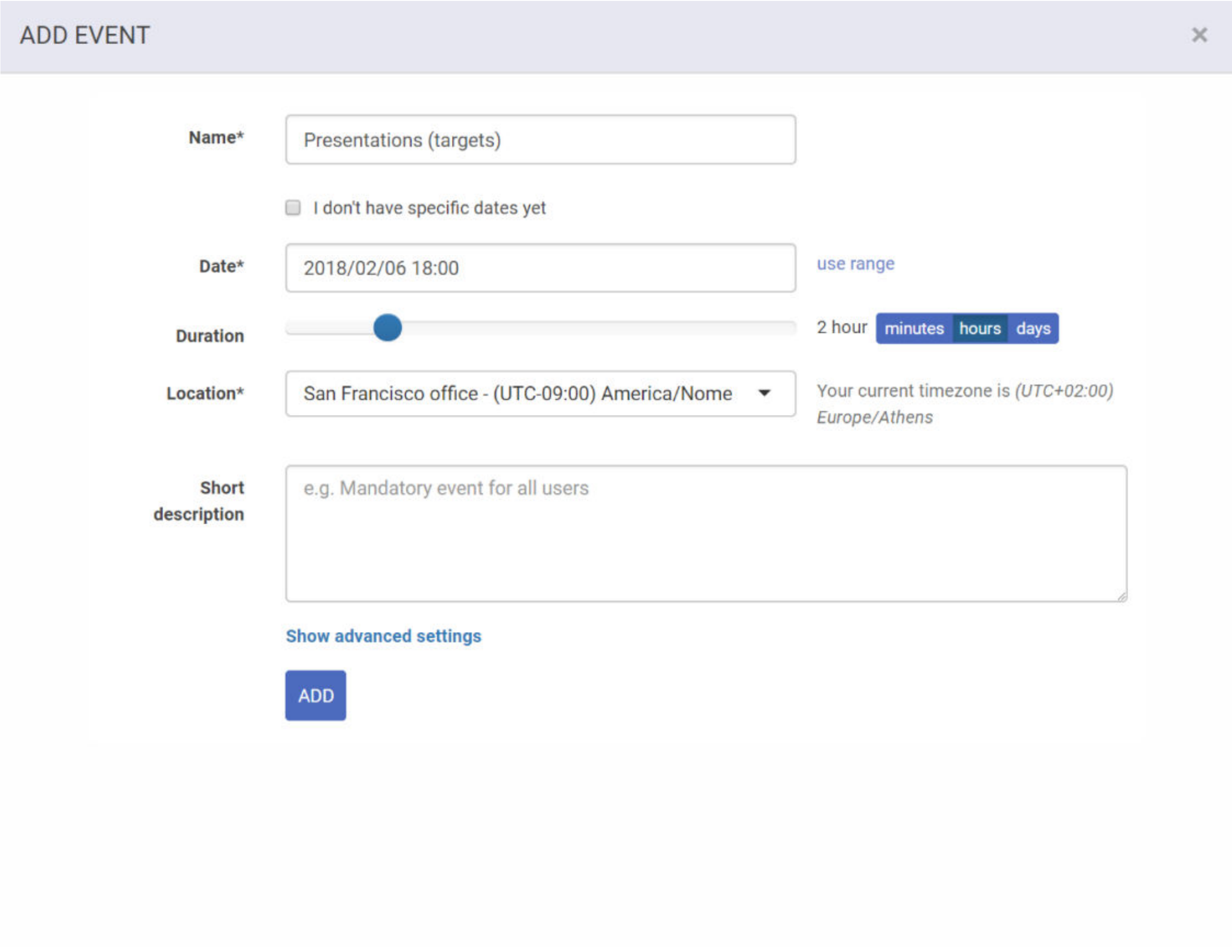
In case you want to add a new training event to your course, you have to click on the Content button again and then Go to the Lessons library **(1)**.



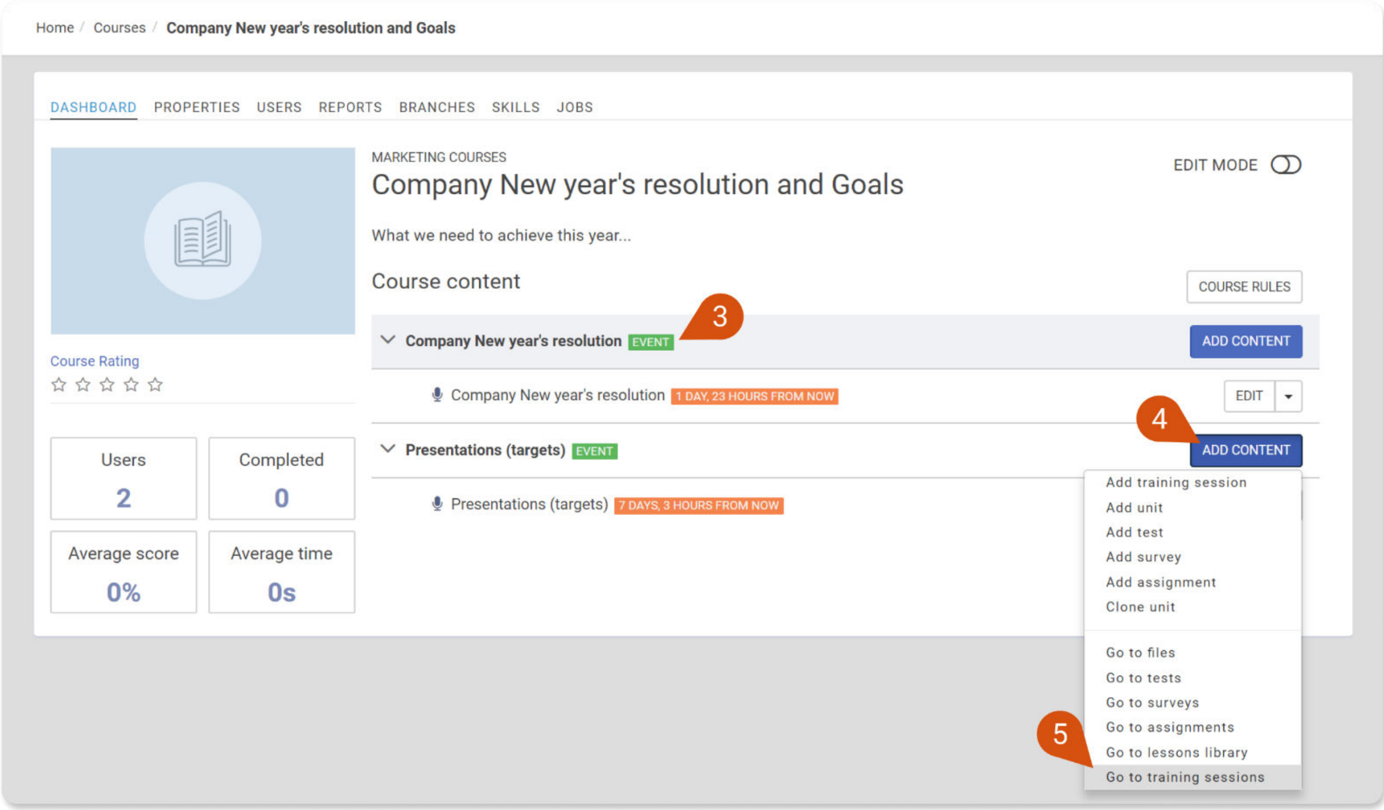
Click on the arrow next to the Add Lesson button and click on the Add event option **(2)**:



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:



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)**.



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

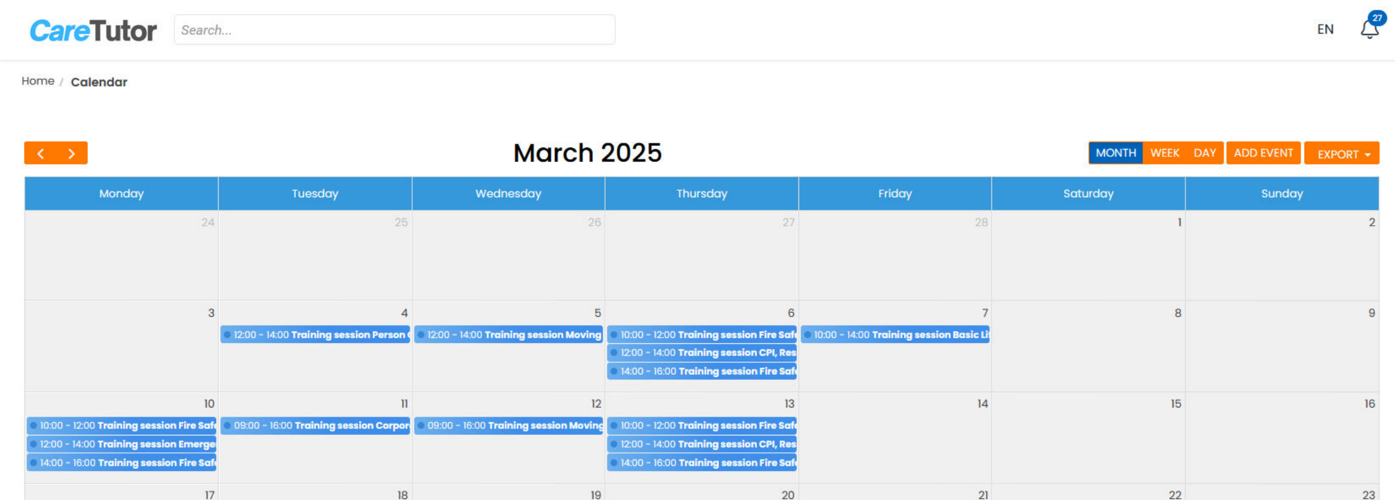
Locations are names of the venues (real or virtual) that classes or meetings will take place, allowing you to organize your class schedule and inform your students of upcoming meetings.

Registering user for Training Sessions

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

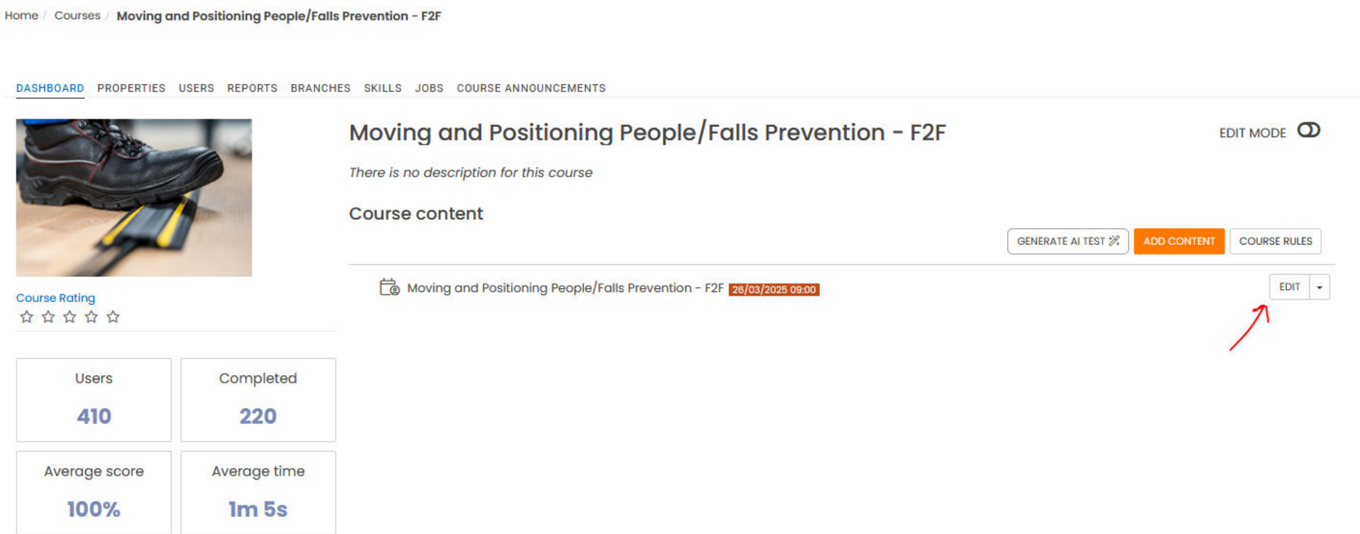
1. The administrator/instructor assigns the user to one.
2. The users select their preferred session after enrolling to the course.

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

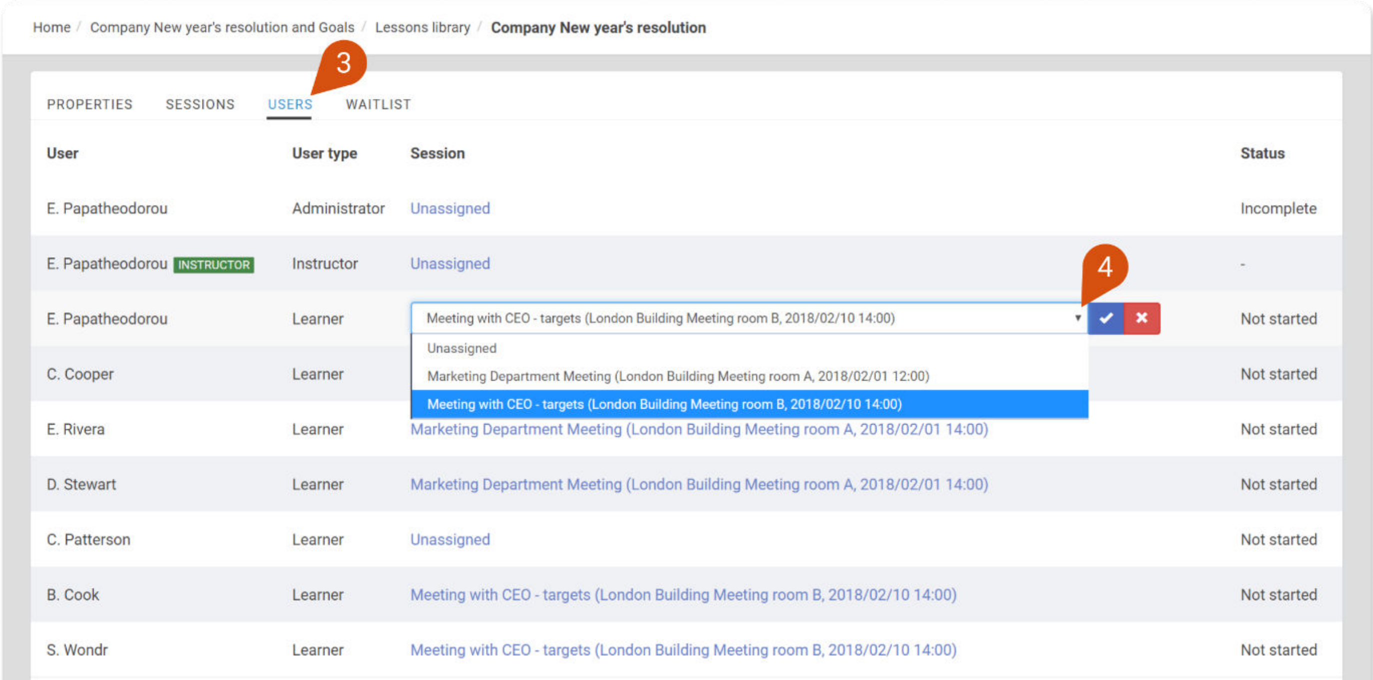


Method 1: The administrator assigns a user to a session

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).**

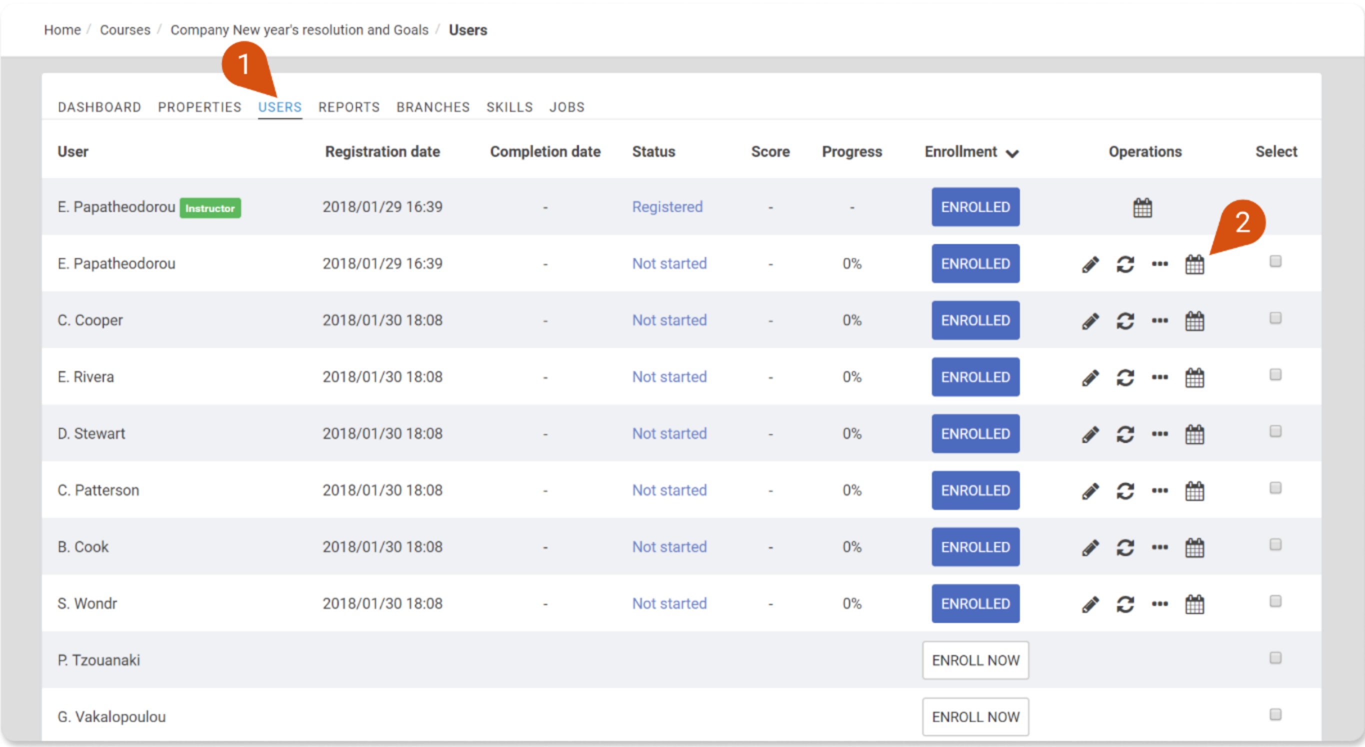


Then go to the Users **(3)** tab where you will see the list of the users that are already enrolled in this blended learning course. Under the Sessions, column click on the Unassigned link to select the session of the event **(4)**.

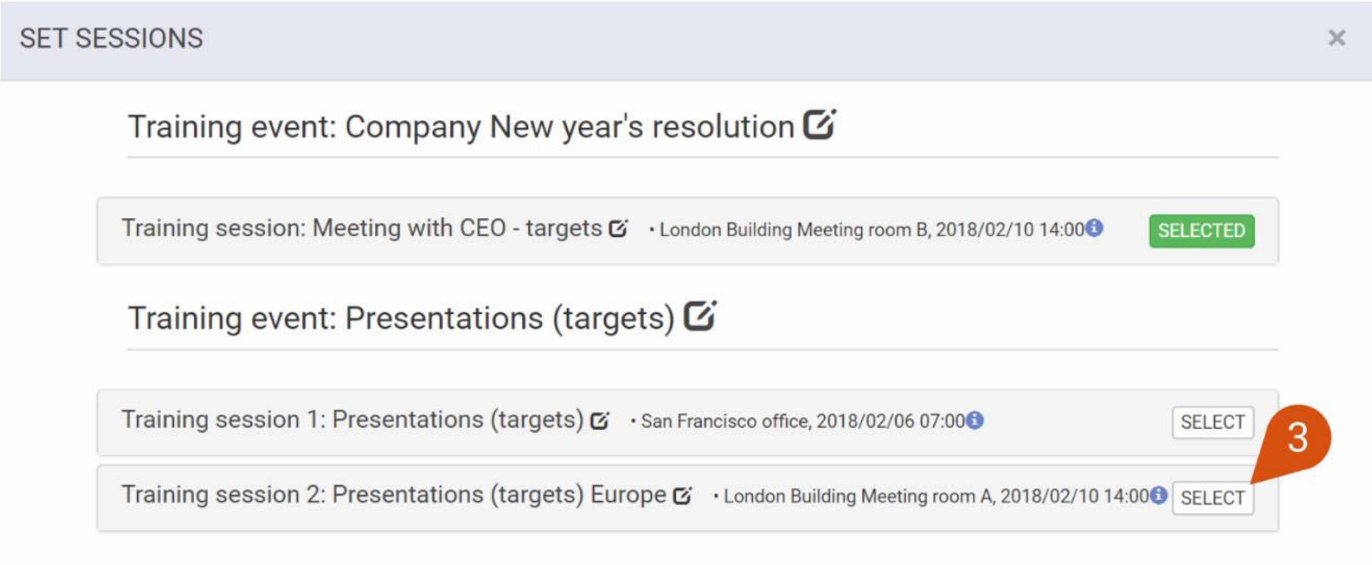


Note: Through this page, you can only see the sessions of the specific training event.

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)**.

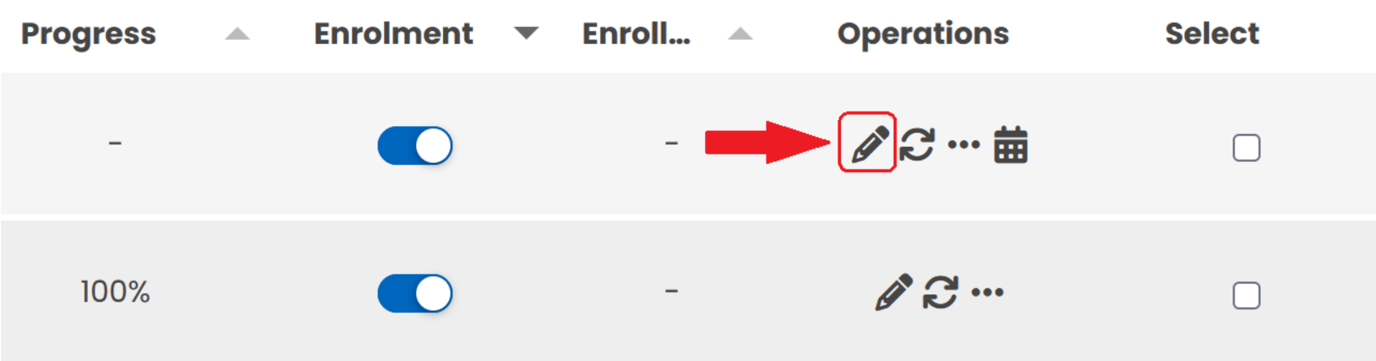


A pop-up with all the available sessions of all training events of this course will show up. Click to select the session of the training event you want **(3)**.

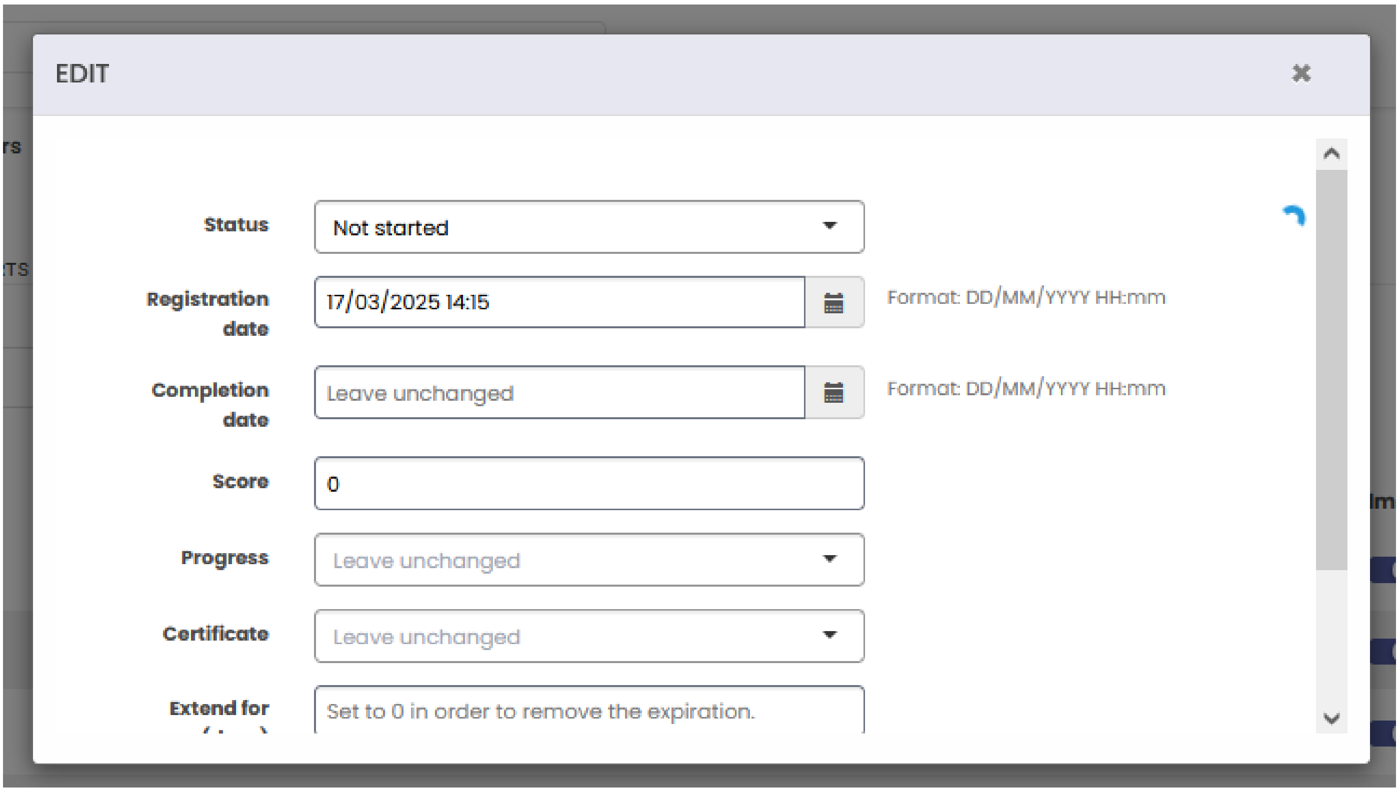


Note: A learner can only be assigned to a single Training Session for a given Training Event. A trainer, however, can be registered to as many needed

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:



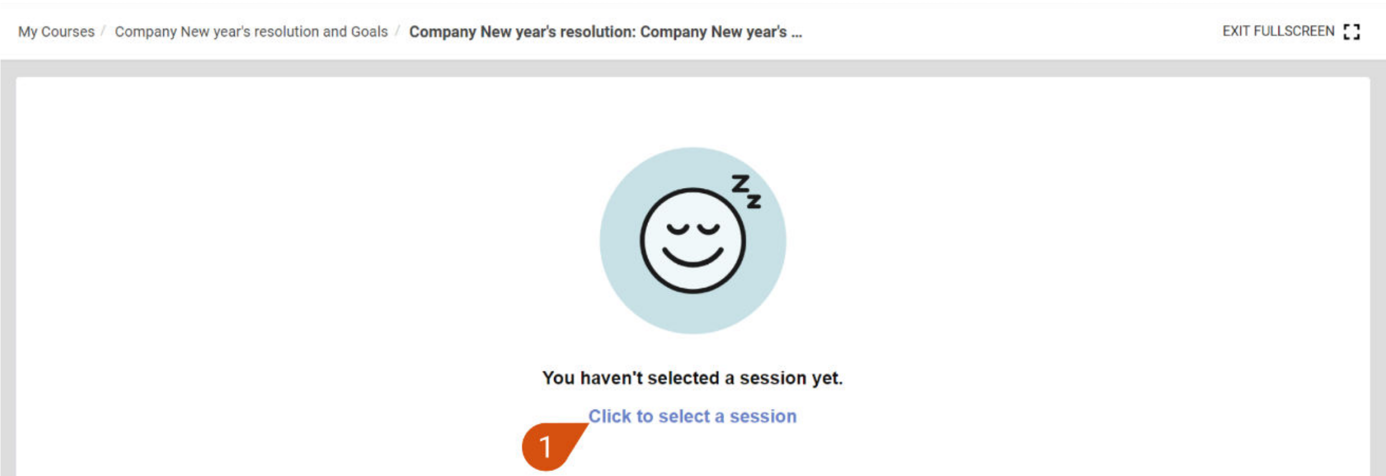
From this pop-up you can manually populate the course under the "Profile tab" (shown below) and then scroll down and click submit



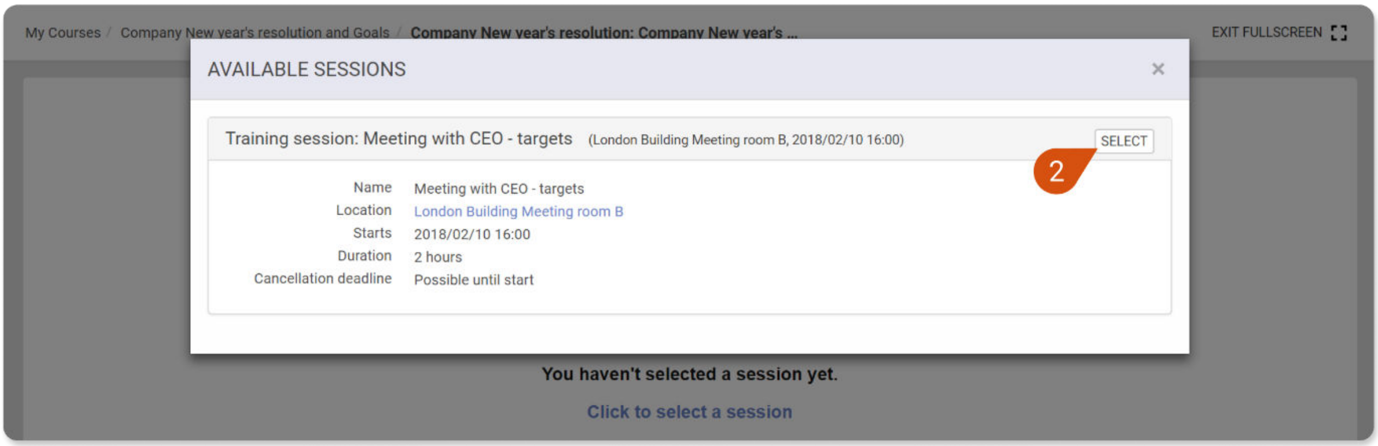
<u>Method 2: The user selects a session after enrolment</u>

Let's suppose that a new or existing user wishes to register for a blended learning course. The user visits the Course Catalogue and takes the course from the list.

Clicking on it brings up the Course information page, where the user can see the available Training events and their Training Sessions. The users can select a session to register directly through this page. Otherwise, they can add the course to their roster and select the session afterward. In this case, when accessing the course, the users will be presented with this screen:



Once there, the users will be notified that they have not selected any session of this event yet and that they can click to select a session **(1).** Doing so will bring up a pop-up with all available sessions of this event for the user to choose **(2)**.



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