INQUISIQ r3

Implementation Guide

Overview

This Implementation Guide is designed to assist you with the initial setup of your Inquisiq R3™ LMS by providing a comprehensive overview of the key elements that should be addressed. Note that the details on any one specific topic can be found in the Inquisiq R3™ Manuals and this document is designed more to provide a roadmap of the items that should be considered during your setup.

This guide is broken down into two primary areas:

- Inquisiq R3™ configuration items that can be completed at any time, but should be completed before you formally launch your LMS. These items are listed in the section below.
- Inquisiq R3™ configuration items that should be completed in a specific sequence.

Branding

Your LMS portal can easily be customized and branded to your corporate identity. With just a few clicks you can create a unique banner/masthead, footer, menu bar, and homepage.

1. From the menu bar, select **Administration Menu**.
2. Click on the **Interface** sub-menu.
3. Select and configure the following: Masthead, Footer, Main Menu, and Home Page. Complete details can be found in the **Inquisiq R3™ Administrator Manual – System & Interface**.

Domain Aliases

You may alias any domain that you own to your LMS portal. For example, if you find that "bobsonlineuniversity.com" is available and you register it, you may alias that domain to your LMS.

1. From the menu bar, select **Administration Menu**.
2. Click on the **Domain Aliases** icon in the **System** sub-menu.
3. Enter your domain aliases. Complete details can be found in the **Inquisiq R3™ Administrator Manual – System & Interface**.

Email Notifications

If you plan to automatically notify users, supervisors or the system admin of certain events that have happened or are about to happen via email, you will want to setup your email notifications.

1. From the menu bar, select **Administration Menu**.
2. Click on the **System** sub-menu, then select **Email Notifications** and build all of your notifications. Complete details can be found in the **Inquisiq R3™ Administrator Manual – System & Interface**.

API

Inquisiq R3™ has a built-in API that other web applications can communicate with. The most common use of the API is "single sign-on." Because the API is considered custom programming, the use of the API is not covered in the standard support agreement.

1. From the menu bar, select **Administration Menu**.
2. Click on the **API** icon in the **System** sub-menu and configure your API. Complete details can be found in the **Inquisiq R3™ API Manual** along with the **Inquisiq R3™ Administrator Manual – System & Interface**.

Configuration – Step by Step

When you first create your Inquisiq R3™ LMS portal, an "Administrator" account is automatically created. It is important to note that the Administrator is NOT a user in the system, so they may not enroll in courses (they have no "My Account" screen). The Administrator has all of the administrative rights available in the system and is the only account that can assign permissions to other users and it cannot be deleted. Please follow the sequence of steps listed below in order to get the most out of your new Inquisiq R3™ LMS.

Step #1 – Make Yourself a "Super User"

1. Login as the "Administrator" using the username "admin" or "administrator" and the password you specified when you created your portal.
2. From the menu bar, select **Administrator Menu** then click on the **Users** icon located in the **Users & Groups** sub-menu.
3. Click **New User** at the top right side of the screen.
4. Complete the User Profile, and click **Create Account**.
5. Select the **Permissions** icon from the **Tools** menu.
6. Check every box and click **Save Changes**. From this point forward, unless you need to assign someone specific permissions, you will want to log in as the "Super User."

Step #2 – Login as the "Super User"

Log out of the Administrator account and log back in using the account you just created in the previous step. You will notice now that you have a **My Account** tab on the menu bar.

Step #3 – Configure "Login Setup"

Now we will need to decide how your users are going to get into the system (self – registration, admin upload, synchronized from outside sources, or some combination of these).

1. From the menu bar, select **Administration Menu**.
2. Click on the **Login Setup** icon in the **System** sub-menu. Configure your Login Setup settings. Complete details can be found in the **Inquisiq R3™ Administrator Manual – System & Interface**.

By default, your application will allow users to create their own account by using the registration link on the home page.

Step #4 – Configure "User Account Data"

At this point you will need to determine what User Account Data you would like to collect from your users.

1. From the menu bar, select **Administration Menu**.
2. Click on the **User Account Data** icon in the **System** sub-menu.
3. Configure your User Account Data settings. Complete details can be found in the **Inquisiq R3™ Administrator Manual – System & Interface**.

By default, Inquisiq R3™ requires a First Name, Last Name, Username, and Password. You cannot change these. All of the other fields you may change including the label, who can view them (administrator or user), and if they are required or not. In addition, there are ten "User Defined Fields," which you can configure any way you want.

Step #5 – Configure "Localization"

Localization is important if you plan to have synchronous events such as classroom or web meeting sessions. Localization will make sure that all of your users show up at the correct time regardless of their time zone. You may also set your date format here (US or European format).

1. From the menu bar, select **Administration Menu**.
2. Click on the **Localization** icon in the **System** sub-menu.
3. Configure your Localization settings. Complete details can be found in the **Inquisiq R3™ Administrator Manual – System & Interface**.

Step #6 – Configure "E-commerce"

If you plan on selling your courseware, you will need to configure the E-commerce system.

1. From the menu bar, select **Administration Menu**.
2. Click on the **E-commerce** icon in the **System** sub-menu and configure your E-commerce settings. Complete details can be found in the **Inquisiq R3™ Administrator Manual – System & Interface**.

Step #7 – Configure your Courseware

Inquisiq R3™ is a pure LMS, therefore you cannot create courseware with it. You will need to create your courseware with one of the many SCORM compliant authoring tools on the market and upload the SCORM compliant .zip file into Inquisiq R3™. Once uploaded, you may configure the SCORM package as a complete course or as an individual lesson.

1. From the menu bar, select **Administration Menu**. Then click on the **SCORM Packages** icon in the **Content** sub-menu.
2. Upload and configure your SCORM package. Complete details on SCORM and course configuration can be found in the document, **How to Upload SCORM Packages and Set Up Courses in Your LMS** and the **Inquisiq R3™ Administrator Manual – Content**.
3. Click on the **Courses** icon in the **Content** sub-menu and configure your courses.

Step #8 – Set up "Course Catalog"

Now that your courses are uploaded, you can now build and arrange them in your course catalog. At this point you will want to consider the following things: whether or not you want catalogs within catalogs, and whether or not you would like a catalog to be "Public" or "Private."

1. From the menu bar, select **Administration Menu**. Then click on the **Course Catalog** icon in the **Content** sub-menu.
2. Configure your catalogs. Complete details on this step as well as the step below can be found in the **Inquisiq R3™ Administrator Manual – Content**.
3. Assign courses to each catalog. Then configure your catalog settings using the **Options** tab.

Step #9 – Create "Groups"

The "Group" function is one of the most powerful features in the Inquisiq R3™ LMS, as it allows you to automate most of the enrollment processes. You will want to create all of your groups now. Each user can be in none, some, or all of your groups. You may assign each group any number of course enrollments along with access to private catalogs. A key point to note is that groups have inheritance, which means that any user who joins the group will inherit the enrollments, private catalog access, and the permissions assigned to that specific group.

1. From the menu bar, select **Administration Menu**.
2. Click on the **Groups** icon in the **Users & Groups** sub-menu.
3. Configure your settings. Complete details can be found in the **Inquisiq R3™ Administrator Manual – Users & Groups**.

Step #10 – Create "Grouping Rules"

Using "Grouping Rules" allows you to automate how your users join groups. You may attach a "Grouping Rule" to any input in the User Account Data to assign a user to a specific Group. For example, you have created a group called "HR." Within your User Account Data, a user has "HR" in their Department field. You could make a rule that joins all users whose Department equals "HR" to the "HR" Group.

1. From the menu bar, select **Administration Menu**.
2. Click on the **Grouping Rules** icon in the **System** sub-menu.
3. Configure your Grouping Rules. Complete details can be found in the **Inquisiq R3™ Administrator Manual – System & Interface**.

Step #11 – Set up "Coupon Codes"

If you plan on selling your courseware, you may want to use the Coupon Codes to offer discounts to your clients.

1. From the menu bar, select **Administration Menu**.
2. Click on the **Coupon Codes** icon in the **Content** sub-menu.
3. Configure your settings. Complete details can be found in the **Inquisiq R3™ Administrator Manual – Content.**

Step #12 – Setup "Certificates"

If you plan on awarding printable certificates to your users upon completion of a course or series of courses, you will want to configure all of your certificates now. While Inquisiq™ gives you a generic certificate template, we encourage you to scan in your unique blank certificate template, and upload the .jpg image of the template into your LMS.

1. From the menu bar, select **Administration Menu**.
2. Click on the **Certificates** icon in the **Content** sub-menu.
3. Upload and configure your certificates. Complete details can be found in the **Inquisiq R3™ Administrator Manual – Content**.

Step #13 – Input your Users

This is the final step before you go live. After you have configured everything in your LMS, you are now ready to put your users in the system. If you selected "Self-Registration" in Step #3: Login Setup, then you are done! If you are putting users in the system yourself using a batch upload or other synchronization method, you will need to do that now. To input users individually or by a batch upload, follow the steps below:

1. From the menu bar, select **Administration Menu**.
2. Click on the **Users** icon in the **Users & Groups** sub-menu.
3. Select your input method. Complete details can be found in the **Inquisiq R3™ Administrator Manual – Users & Groups**.

Support Resources

User Guides and Manuals – Access guides, manuals, sample SCORM packages and white papers at http://www.inquisiqr3.com/resources/documents/#supportdocs

Demos – Inquisiq R3™ General Overview http://www.inquisiqr3.com/resources/documents/#demos

Knowledgebase – http://support.icslearninggroup.com

Ticket-based Support – submit a ticket to our support center at http://support.icslearninggroup.com

Frequently Asked Questions

What should I do if I forget my Password?

Click the "I forgot my password" link on the login screen and follow the onscreen instructions.
If you forgot the password to your Administrator account, submit a ticket to our support center and we will reset it for you.

How do I create another LMS portal if I am a SaaS client?

You can add another portal in two ways:

- You can create one from scratch by creating a free trial account. Once you have that set up, submit a ticket to our support center with the name of the portal you created and we will add that to your account.
- If you want to clone one of your existing portals, just tell us which one and we will clone it for you (everything except the users).

In either case, we treat your user total as if it were all one account and bill you accordingly, in addition to the $20/month cost for each additional portal.

What should I do if our certificates are not auto populating the fields chosen in the setup process?

This may be corrected by resetting the Localization.

1. From the menu bar, select **Administration Menu**. Then click on the **Localization** icon in the **System** sub-menu.
2. Reset your Localization settings and click **Save Changes** (even if the correct time zone was already selected).

Which web browser should I use?

Inquisiq R3™ works in any of the following web browsers:

- Internet Explorer 6.x - 11
- Firefox 2.x or higher
- Google Chrome
- Safari 1.x or higher
- Adobe Flash Player 9 or higher (required for certificate functionality)