


WebMentor
Enterprise
Learning Management System

Installation & Configuration Guide

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Preface

Thank you for choosing WebMentor as your online training system. The WebMentor Enterprise Learning Management System integrates all of the features and facilities that you need to author, install, manage and present interesting and informative training programs over the Internet, your intranet or extranets.

The WebMentor Enterprise Learning Management System consists of the WebMentor Personal Authoring Server and the WebMentor Enterprise Training Server. The Personal Authoring Server allows you to author, test and publish complete courses for installation on the Enterprise Training Server. The Enterprise Training Server provides facilities for managing your training environment and delivering installed courses.

Printed and electronic documentation provides the information you need to install WebMentor, author courses, manage your training environment and navigate through course material. Integrated online help is an important part of each of the WebMentor Enterprise Server components.

Audience

This document is for staff who must install WebMentor Enterprise Training Server components and operate in the role of Course Provider.

Prerequisites

None.

Technical Support

Contact Avilar for technical support issues related to WebMentor Enterprise at:

Web: <http://www.avilar.com/support>

Preface

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1 Preparing to Install WebMentor Training Server

This section contains installation and configuration information necessary to install and run Version 3.22 or higher of the WebMentor Enterprise Training Server. For instructions on installing and using the WebMentor Personal Authoring Server, see the *WebMentor Authoring Guide*.

System Requirements

This version of the WebMentor Enterprise Training Server is supported on Microsoft Windows NT. The WebMentor Personal Authoring Server is supported on Windows 2000, Windows NT, Windows 95 and Windows 98. To install and use the WebMentor Enterprise Training Server, your system must meet the following minimum requirements:

- OS: Windows 2000 or Windows NT 4.0
- Processor: Intel Pentium Processor (200MHZ or faster)
- Disk Space: 100MB free hard disk space
- Memory: 256MB RAM (512MB recommended for SQL Server or Oracle)
- Web Server: A web server that supports NSAPI, ISAPI or WSAPI. The product has been tested on Netscape's Enterprise Server 2.0 and Microsoft's Internet Information Server 4.0 and 5.0.
- DBMS: An ODBC compliant relational DBMS. The product has been tested on Microsoft Access 7, Microsoft SQL Server 6.5 and 7.0, and Oracle 8 (not 8i).
- Macromedia Cold Fusion 4.5 or 5.0



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2 Installing and Configuring WebMentor Training Server

There are several steps to successfully installing the WebMentor Enterprise Training Server. The steps should be performed in the order shown below. Each step is discussed in detail in subsequent sections of this document.

1. Install the WebMentor Enterprise Training Server.
2. Configure the Cold Fusion Application Server.
3. Configure the WebMentor Training Server.

Note: If you are installing the WebMentor Enterprise Training Server with the Netscape Enterprise Server, you must set up the web server to execute programs from **cgi-bin** directories. Use the Netscape Server Administration system as described below. You must perform this operation *before* installing the WebMentor Training Server.

1. Logon to the Netscape Server Administration System and, if you have more than one web server installed, select the server under which WebMentor will run.
2. Click the **System Settings** button.
3. Click **Dynamic Configuration Files**.
4. In the Editing field, enter ***/cgi-bin/***.
5. Click the **OK** button.
6. Close the Netscape Server Administration System.

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Installing the WebMentor Training Server

The WebMentor Enterprise Training Server may be obtained on a CD-ROM or downloaded from the Avilar web site. If you wish to download the WebMentor Training Server from the Avilar web site, contact Avilar Technical Support to obtain download information.

Note: You should be logged on to your computer as the Windows NT Administrator when you perform the installation of the WebMentor Enterprise Training Server.

If you are installing the WebMentor Enterprise Training Server from a CD-ROM, insert the CD-ROM into the CD-ROM drive. The installation is self-starting. The WebMentor Installation Screen will be displayed. Click **Install WebMentor Enterprise** to start installing the WebMentor Enterprise Training Server.

If you have downloaded the installation file, its name is **webmentorN.NN.exe** where *N.NN* is the version number. It is a self-installing file. To begin the WebMentor Enterprise Training Server installation, run the **webmentorN.NN.exe** file. Use a Command (DOS) Window, the **Run** entry in the Windows Start menu, or double-click on the file name in Windows NT Explorer. This will start the WebMentor Enterprise Training Server installation.

The WebMentor Enterprise Training Server should be installed in the directory that contains your front-end files used to access WebMentor entry points. Actually, the WebMentor directories are installed below this directory by the installation procedure. See “Integrating WebMentor Training Server into Your Environment” on page 27 for a discussion of front-end screen development and WebMentor entry points. If you have not built your front-end screens, install the WebMentor Enterprise Training Server into the directory in which your front-end screens will be stored. Two default front-end screens are provided with WebMentor. They are:

- **Provider.html** - Provides access to the WebMentor Training Server for the Course Provider.
- **Training_home.html** - Provides access to the WebMentor Training Server for all other roles.

During the installation process, you will be prompted for several pieces of information. It is recommended that you obtain this information prior to beginning the installation process. The following information will be required to successfully complete the WebMentor Enterprise Training Server installation.

- The web server to be used with WebMentor.

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- The path to the directory in which WebMentor is to be installed. Your web server's primary document directory is the default location. If you install WebMentor in another location, you must establish an alias for that location in your web server.
- The address of your SMTP mail server. This address can be in name form (e.g., **mail.xyzcorp.com**) or IP form (e.g., **127.0.0.1**).
- The DBMS that WebMentor will use to manage training information (currently MS Access 7, SQL Server 6.5 or 7.0, or Oracle 8). The DBMS software must be installed and operational when the WebMentor installation is performed.

If you are using SQL Server or Oracle as your DBMS, the following information will be required.

- The name of the server on which the SQL Server DBMS is running. This is usually the name of the local computer, but may be a remote server.
- The Username and Password of an existing SQL Server or Oracle account with administrator privileges. This account is used to create the WebMentor databases and the **webmentor** user logon account. You may use the SQL Server **sa** account and its password.
- The Password that you want assigned to the **webmentor** user logon account. This Password is used by WebMentor when it accesses its databases. You may assign any password you like but you must not forget this password. It will be used whenever you install a new course under WebMentor. The Username for the WebMentor logon account is **webmentor**.
- For SQL Server 6.5, the SQL Server database and log device size. WebMentor has two databases and creates a SQL Server logging device for each database. Thus, four SQL Server devices are created. Each device is a file. The same size is used for each device file. A default size of 50MB is used, but you may override the default size.
- For SQL Server 6.5, the location of the logging device files. The default location is in the same directory as the database device files. However, it is recommended that the logging devices be placed on a different disk from that used for the database devices, if possible.

The WebMentor Enterprise Training Server installation process adds an entry, **WebMentor Enterprise Server**, to your computer's Programs menu. The WebMentor entry has a submenu with the following three entries:

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- **Cold Fusion Administrator** - Invokes the Cold Fusion Administrator (see Configuring the Cold Fusion Application Server below).
- **Course Provider** - Invokes the **provider.html** screen from the directory in which the WebMentor Training Server was installed.
- **Training Server** - Invokes the **training_home.html** screen from the directory in which the WebMentor Training Server was installed.

Note: If you installed the WebMentor Enterprise Training Server with the Microsoft Internet Information Server (IIS), you must insure that certain virtual directories have execute privileges before you continue. This can be done from the Internet Service Manager as described below.

1. From the Windows Start menu, select **Programs**.
2. From the Programs menu, select **Windows NT 4.0 Option Pack**.
3. From the Windows NT 4.0 Option Pack menu, select **Microsoft Internet Information Server**.
4. From the Microsoft Internet Information Server menu, select **Internet Service Manager**. This will start the Microsoft Management Console for IIS. The Microsoft Management Console has a split window configuration.
5. In the left window, click on the **Internet Information Server** entry.
6. Under the Internet Information Server entry, click on the entry for your Server.
7. Under your Server entry, click on the **Default Web Site** entry.
8. Under the Default Web Site entry, click the *right* mouse button on the **WebMentor** directory entry. This will display a pull-down menu.
9. From the pull-down menu, select **Properties**. This will display a dialog window with several tabs along the top.
10. Click on the **Directory** tab.
11. In the **Permissions** section at the bottom of the dialog window, click the radio button next to **Execute** (including script).
12. Click the **OK** button at the bottom of the dialog window.

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13. Under the **Default Web Site** entry, click the *right* mouse button on the **CFIDE** directory entry. This will display a pull-down menu.
14. From the pull-down menu, select **Properties**. This will display a dialog window with several tabs along the top.
15. Click on the **Directory** tab.
16. In the **Permissions** section at the bottom of the dialog window, click the radio button next to **Execute** (including script).
17. Click the **OK** button at the bottom of the dialog window.
18. Close the Microsoft Management Console window.

When the WebMentor installation has finished, you must configure Cold Fusion and WebMentor.

Configuring the Cold Fusion Application Server

If you selected Microsoft Access as your DBMS during the installation of the WebMentor Enterprise Training Server, you may skip this section since no configuration is required for the Cold Fusion Application Server. If you selected Microsoft SQL Server or Oracle as your DBMS, follow the instructions below to configure Cold Fusion.

To configure Cold Fusion to access the Microsoft SQL Server or Oracle DBMS, you must start the Cold Fusion Administrator. To do so, follow these steps:

1. From the Windows Start menu, select **Programs**.
2. From the Programs menu, select **WebMentor Enterprise Server**.
3. From the WebMentor Enterprise Server submenu, select **Cold Fusion Administrator**.
4. When the Cold Fusion Administrator cover screen is displayed, enter **webmentor** as the Administrator password and click the **Submit** button.
5. The main Cold Fusion Administrator screen will be displayed. A menu will be on the left side of the browser window in which it is displayed.

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Specifying the WebMentor Username and Password for SQL Server and Oracle

Configuring Cold Fusion to work with Microsoft SQL Server or Oracle requires that you specify the Username and Password that will be used by the WebMentor Enterprise Training Server to access the Webmentor databases. The Username is **webmentor** and the Password was entered by you in the WebMentor Logon screen during the WebMentor installation.

The same Username and Password are used for both the WebMentor Database and the Conferences Database. You must enter the Username and Password for both databases. Use the following procedures to do this.

Entering the Username and Password for the WebMentor Database

1. Click on the **Data Sources** item in the Cold Fusion Administrator menu on the left side of the browser window. The ODBC Data Sources Available to Cold Fusion screen will be displayed.
2. Click on the data source named **WMDData**. If no such data source appears in the list, contact Avilar Technologies, Inc. The Edit ODBC Data Source screen will be displayed.
3. Click on the **CF Settings >>** button at the lower left corner of the browser window. Additional fields will be displayed below the current fields.
4. On the Cold Fusion Login line, enter the WebMentor Username used to access the SQL Server or Oracle database in the Username field. This must be **webmentor**.
5. Again on the Cold Fusion Login line, enter the WebMentor Password used to access the SQL Server or Oracle database in the Password field.
6. Click the **Update** button at the bottom of the form. The Username and Password for the WMDData data source (the WebMentor Database) will be saved and you should be returned to the ODBC Data Sources Available to Cold Fusion screen.
7. To verify that you can access the WMDData data source, select **WMDData** in the ODBC Data Source field at the bottom of the screen and click the **Verify** button.
8. You should see a screen that says “The connection to the data source was verified successfully”. If not, contact Avilar Technologies, Inc. If so, click the **Go Back** button to return to the ODBC Data Sources Available to

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Cold Fusion screen.

Entering the Username and Password for the Conferences Database

1. Click on the data source named **WMConferences**. If no such data source appears in the list, contact Avilar Technologies, Inc. The Edit ODBC Data Source screen will be displayed.
2. Click on the **CF Settings >>** button at the lower left corner of the browser window. Additional fields will be displayed below the current fields.
3. On the Cold Fusion Login line, enter the WebMentor Username used to access the SQL Server or Oracle database in the Username field. This must be **webmentor**.
4. Again on the Cold Fusion Login line, enter the WebMentor Password used to access the SQL Server or Oracle database in the Password field.
5. Click the **Update** button at the bottom of the form. The Username and Password for the WMConferences data source (the Conferences Database) will be saved and you should be returned to the ODBC Data Sources Available to Cold Fusion screen.
6. To verify that you can access the WMConferences data source, select **WMConferences** in the ODBC Data Source field at the bottom of the screen and click the **Verify** button.
7. You should see a screen that says “The connection to the data source was verified successfully”. If not, contact Avilar Technologies, Inc. If so, click the **Go Back** button to return to the ODBC Data Sources Available to Cold Fusion screen.

You have completed configuring Cold Fusion for use with WebMentor and the SQL Server or Oracle DBMS. Close the Cold Fusion Administrator browser window.

Troubleshooting Installation Problems

The WebMentor Enterprise installer creates a **tools** subdirectory in the directory in which you install WebMentor. This subdirectory contains several log files that record installation activities and messages. If installation problems occur, these log files may help determine what went wrong. For example, the file **database.log** contains the log of actions taken against the database.

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The **tools** subdirectory also contains a number of troubleshooting tools, some of which are also used by the WebMentor Enterprise installer during product installation. You can run these tools yourself in a command window to examine to test various product components.

All of these tools accept the following command line options.

| | |
|--------------------------------------|---|
| <code>-datasource <i>name</i></code> | Specifies the name of the data source |
| <code>-username <i>name</i></code> | Specifies the username required for database access |
| <code>-password <i>pw</i></code> | Specifies the password required for database access |
| <code>-log</code> | Specifies ??? |

Only SQL Server and Oracle have significant set up. The configuration of Access is done primarily through file installations.

The following tools are available in the **tools** subdirectory:

| | |
|-----------------------|--|
| <code>instdb</code> | Tests a data source to see if it can be used. Use this program to determine if the administrative account for SQL Server and Oracle is working. The program generates the file instdb.ini . Note that the file created during installation is overwritten, however. |
| <code>Dbterm</code> | Use this program to issue SQL commands to a data source. It is used during installation to send a set of SQL commands to the server (see the .sql files). |
| <code>Dbexport</code> | Dumps any table in the database. Not used during installation. |
| <code>Dbsrc</code> | Allows you to manipulate and examine data sources. Also accepts the <code>-check</code> option, which checks to see if the data source is valid. Also accepts the <code>-drivers</code> and <code>-sources</code> options to display information about the database's drivers and sources, respectively. |
| <code>Dbmaint</code> | Allows you to manipulate and examine contents of data sources. Also accepts the <code>-drop</code> option, which drops all the tables in a source. |
| <code>Servmgr</code> | Allows you to manage NT services from the command line. Options include <code>-start</code> , <code>-stop</code> , <code>-install</code> , <code>-remove</code> , and <code>-dump</code> . This may more convenient to use than the window-based Service Manager. |

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Configuring the WebMentor Training Server

To configure the WebMentor Training Server, you must enter the WebMentor Administration System in the Course Provider role. To do so, follow these steps.

1. From the Windows Start menu, select **Programs**.
2. From the Programs menu, select **WebMentor Enterprise Server**.
3. From the WebMentor Enterprise Server submenu, select **Course Provider**.
4. When the Provider Logon screen is displayed, enter **cp** as the Provider ID and **password** as the Password and click the **Enter** button. You should change the Course Provider Password as described in “Changing your Course Provider Password” on page 25.
5. The Provider Main Menu screen will be displayed. Click on **Administrative Functions...**
6. The Administrative Menu screen will be displayed.

Configuring the WebMentor Enterprise Training Server requires the following two operations, both initiated from the Administrative Menu screen.

1. Update the Course Provider information in the WebMentor database.
2. Register your WebMentor license with Avilar Technologies, Inc.

Updating the Course Provider Information

Having the correct information for the Course Provider in the WebMentor database is vital to the operation of the WebMentor Training Server. You set this information as follows.

1. Click on **Review your Provider Information** in the Administrative Menu screen.
2. The Course Provider Information screen will be displayed. It contains a form in which the current information is displayed. Most fields can be modified. You should change the information in the form to be correct for your installation.
3. Click the **Change** button when you have completed your modifications. The Provider Information Changed confirmation screen will be displayed.

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You may modify the Course provider information again at any time.

The following fields in the Course Provider Information form are particularly important to the successful operation of the WebMentor Enterprise Training Server. Some fields are filled in during installation while you must fill in the others.

| Field | Description |
|-----------------------|--|
| E-mail: | The e-mail address of the Course Provider (e.g., theman@avilar.com). |
| Open Organization ID: | The Organization ID of the WebMentor default organization. You must create at least one organization before students can enroll. You may create an organization having the Organization ID that you specify in this field, but it is not required. This organization, if created, is treated the same as any other organization. |
| Bookkeeper E-mail: | The e-mail address where most action notifications are sent. This is often the same as the Course Provider's e-mail address. |
| Sysadmin E-mail: | The e-mail address where user's comments, questions and problems are sent. This is often the same as the Course Provider's e-mail address. |
| SMTP Server: | The Internet address of your mail server (e.g., mailhub.avilar.com, 127.0.0.1). This is filled in during installation. If you change it, you must also change the mail server address for Cold Fusion using the Cold Fusion Administrator. |
| WebMentor Path: | The path to the directory in which WebMentor was installed (e.g., d:\mydocs\webmentor). This is filled in during installation and should not be changed. |
| WebMentor Location: | The URL that is used to access the root of the path to the WebMentor installation (e.g., http://www.yoursite.com/). |

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| Field | Description |
|-----------------|--|
| WebMentor Exit: | <p>The contents of this field control how users exit from the WebMentor Administrative System. There are three valid types of entries that you can make in this field. Each one identifies a different exit approach as follows.</p> <ol style="list-style-type: none"><li data-bbox="943 594 1414 898">1. Blank - A blank field selects the “No exit” approach. Using this exit approach, the word Exit is displayed in gray and is not active and the navigation link Return to Training Home Page is not shown on user logon and main menu screens. Users exit by closing the browser window.<li data-bbox="943 940 1414 1549">2. @ symbol in column 1 - An @ symbol in column 1 of this field selects the “Automatic closing of the browser window” approach. The remaining columns may contain anything. Using this exit approach, the word Close is displayed and the navigation link Return to Training Home Page is shown on user logon and main menu screens. When either the word Close or the navigation link is clicked, the browser window is closed. This approach is useful when the WebMentor Administration System is run in a separate browser window from your front-end screens. |

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| Field | Description |
|---------------------------|---|
| | <p>3. Exit URL - A URL in this field selects the “Go to a specified exit URL” approach. Using this exit approach, the word Exit is displayed, and the navigation link Return to Training Home Page is shown on user logon and main menu screens. When either the word Exit or the navigation link is clicked, the specified exit URL is invoked.</p> <p>Additional information about exiting from the WebMentor Administration System can be found in “Specifying Administration Exit Points” on page 32.</p> |
| License Wait: | <p>License checking occurs whenever the Course Provider reviews the license information, a user logs on or a student registers for a course. The Training System must wait while this processing occurs. The length of the wait depends on the relative speeds of your CPU and your disk.</p> <p>A default value of 4000 is set in this field when WebMentor is delivered. If an error occurs when you attempt to review your license information, return to your Provider Information screen and increase the License Wait time. We suggest that you increase the value by 500 and try again. If an error still occurs, continue to increase the License Wait value by 500 until you can review your license information successfully.</p> |
| Org. Conference Creation: | Allows control of how, when and if organization conferences are created. |

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| Field | Description |
|-----------------------|---|
| Allow Display Change: | <p>Controls the “look” of the Administration System screens for all roles. This does not affect the presentation of course materials. You can set a default look for the Administration screens by clicking Display on the button pad. Once you set the look, you can have it treated as the default look for all users and allow them to customize it for themselves or you can freeze the look you want and not allow users to customize it.</p> <p>If you check this box, users will see the word Display on the button pad and will be able to customize the default look that you have established. If you uncheck this box, the word Display will not appear on any user's button pad except the Course Provider. You can change your selection at any time as you can change the default look at any time.</p> <p>Note that an organization can always set a default “look” for its users that will override that set by the Course Provider.</p> |
| Allow Student E-mail: | <p>Specifies whether or not students may send e-mail. If students are not allowed to send e-mail, the Mail button is disabled (grayed) and no e-mail is permitted from a Course Roster report.</p> |

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| Field | Description |
|-----------------------------------|---|
| Activate Tab Style Interface for: | <p>A tab style interface creates a set of tabs for the various roles supported by the Administration System and displays them above the screen title. Clicking a tab allows the user to change roles.</p> <p>For the Student, Instructor, Administrator and Group roles, a user can change roles without logging on if the user has the same ID, Password and Organization in the target role as in the current role. If so, the Main Menu for the target role is displayed. Otherwise, the logon screen for the target role is displayed and the user must logon in the target role. When the Organization or Provider role is the target role, the user must have the same ID and Password as in the current role.</p> <p>You may control which roles have access to the tab style interface by clicking the appropriate radio button. You may not want to give Students access to the tab style interface since they seldom act in other roles. Note that if a user enters in a role that has the tab style interface, he or she will maintain the tab style interface even in roles for which it is not specified. The interface type (tabs or no tabs) is set when a user logs on and is maintained until that user logs on again.</p> |
| Organization Conference Creation: | Controls whether or not new Organizations are allowed to create their own conferences when they enroll. |
| Student Transcripts: | Controls whether or not student transcripts are kept or allows each organization to decide whether or not to keep transcripts for its students. |

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| Field | Description |
|--------------------|--|
| Catalog Structure: | <p>WebMentor supports a flat catalog structure and a multi-level catalog structure. As Course Provider, you can create a multi-level tree-structured catalog of courses.</p> <p>If you have built such a multi-level Course Catalog and want to make it available to Organizations for ordering training and for Student registration, you must select Multi-level (tree) Structure. If you have not built a multi-level Course Catalog or, for some reason, do not want to make it available to Organizations, select Flat Structure.</p> <p>If you have built a multi-level Course Catalog and select Multi-level (tree) Structure, each Organization can determine whether they want to use the flat Course Catalog or the multi-level tree-structured Course Catalog for ordering training and for Student registration. If you have not built a multi-level Course Catalog or do not make it available to Organizations, they will not be given a choice and must use the flat Course Catalog.</p> |

Registering your WebMentor License

When the WebMentor Enterprise Training Server is delivered, it contains a TRIAL license. You must register your version of WebMentor with Avilar Technologies, Inc. before your full license is established. To do this, follow these steps.

1. Return to the Administrative Menu screen. Click on the **Review your License Information** item. The WebMentor Training Server screen will be displayed. This screen contains a table that shows the status of your license. Initially, the license Status will be TRIAL and the Registered and Licensed fields will blink NO. If an error processing the CFFILE tag occurs when attempting to view your license information, return to the Provider Information screen and increase the License Wait value by 500. Continue to do this until you can review your license information successfully. Refer to page 20 for more information about the License Wait value.

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2. Click the **Register** button at the bottom left of the screen. The Process License screen will be displayed and information about your version of WebMentor will be sent to Avilar Technologies, Inc.
3. You can return to the License Information screen by clicking on **Return to License Information**. The Registered field in the table should contain YES and the button at the lower left should now say **License**.
4. Avilar will process your license request and e-mail a license file back to the Course Provider's e-mail address. You must take the license file and store it into the cgi-bin subdirectory of the directory in which you installed WebMentor (e.g., **d:\mydocs\webmentor\cgi-bin**). The file must be named **license.txt**. Until this licensing process is complete, you may use WebMentor under the TRIAL license.
5. When you have received your license file from Avilar and stored it in the cgi-bin directory under the name **license.txt**, enter WebMentor as the Course Provider and go to the License Information screen.
6. Click the **License** button. The Process License screen will be displayed.
7. You can return to the License Information screen by clicking on **Return to License Information**. The Licensed field in the table should contain YES and two buttons, **Update** and **Upgrade**, should be displayed at the lower left below the table. The remaining fields in the table should display your updated license information. If any of this information is incorrect, contact Avilar Technologies, Inc.
8. If, at any time, you want to upgrade your license, enter WebMentor as the Course Provider, go to the License Information screen and click the **Upgrade** button.
9. The Process License screen will be displayed. A form will be shown in which you can specify how you want your license upgraded. Set the value(s) in this form and click the **Send** button.
10. Your license upgrade request will be sent to Avilar Technologies, Inc. Avilar will send a new license file to the Course Provider's e-mail address. This new license file should be stored in the **cgi-bin** directory under the name **license.txt** as was the original. When this is done, return to the License Information screen and click the **Upgrade** button.
11. You can return to the License Information screen by clicking on **Return to License Information** in the lower left corner of the screen. The fields in the table should display your upgraded license information. If any of

2 - Installing and Configuring WebMentor Training Server

this information is incorrect, contact Avilar Technologies, Inc.

12. You can upgrade your license whenever necessary by repeating steps 8 through 11 above.

You have completed configuring WebMentor. Close the WebMentor browser window.

Changing your Course Provider Password

The Provider ID for the Course Provider is **cp**. The WebMentor Enterprise Training Server is delivered with a default Password for the Course Provider. You should change this password after you have successfully configured WebMentor. To do this, follow the steps below.

1. Enter WebMentor as the Course Provider.
2. When the Provider Main Menu screen is displayed, click on **Administrative Functions...**
3. The Administrative Menu screen will be displayed.
4. Click on **Change the Provider Password**.
5. The Change Provider Password screen will be displayed. It will contain a form into which you must type your current password, your new password and a verification of your new password. When you have done this, click the **Change** button.
6. The Provider Password Changed screen will be displayed confirming that the Course Provider password has been changed.



2 - Installing and Configuring WebMentor Training Server

3 Integrating WebMentor Training Server into Your Environment

The WebMentor Enterprise Training Server manages and delivers training over the Internet, intranets or extranets. It consists of the WebMentor Administration System and the WebMentor Course Delivery System. Both the management of the training and its delivery can be done from any location using a web browser.

Integrating the WebMentor Enterprise Training Server into your web-based training environment requires that you understand the role-based architecture of WebMentor and that you make some decisions about how you will allow students to enroll in your training program and register for courses.

The management of training within WebMentor is based upon roles and is performed by the WebMentor Administration System. Certain activities are assigned to each role. One individual may act in more than one role and several individuals may have the same role and share the responsibility for performing the activities associated with that role. The ultimate goal of all individuals in training management roles is to deliver training to students in a timely and efficient manner.

The WebMentor Administration System supports the following roles:

Course Provider: The Course Provider has the responsibility of administering the training environment. There is only one Course Provider. That is, there is only one User-ID and Password under which the Course Provider can enter the training system. Of course, more than one individual can share the responsibilities of the Course Provider using this User-ID and Password.

Organization: The WebMentor Administration System provides facilities for any number of organizations to independently manage their own training. An organization can assign individuals to the roles of Administrator and Instructor. It can control the enrollment and registration of its students in course sessions established for it by the Course Provider. An Organization can create Groups through which it can manage and report on its students. Note that an organization can be any entity (e.g.,

3 - Integrating WebMentor Training Server into Your Environment

division, department, command, etc.) that wants to exercise control over the training of its members.

WebMentor also supports the concept of “master organizations” that are used to aggregate standard organizations. A master organization has only standard organizations related to it. It has no groups, administrators, instructors or students. For example, consider a training server that delivers medical training to health care workers across the country. The state hospital associations could be the master organizations while the health care facilities in their respective states would be their related standard organizations having groups, administrators, instructors and students.

Group: Groups are associated with an Organization and provide a way for an Organization to manage its students independent of the courses for which they are registered. A student may become a member of a Group automatically based upon the content of a field in the student's record or manually by being added to the Group by its manager. A Group Manager can perform various student management activities for students in the Group and display reports showing the academic progress, status and accomplishments of students in the Group.

Administrator: Administrators are defined by and associated with an organization. An Administrator can be assigned to administer one or more course sessions sponsored by the organization. In turn, an Administrator can assign instructors to course sessions; enroll and register the organization's students; and, monitor student activity in his or her sessions.

Instructor: Like Administrators, Instructors are defined by and associated with an organization. An Instructor can be assigned to instruct one or more course sessions by an Administrator. The Instructor monitors the progress, activity and achievement of students in his or her sessions and assists the students in successfully achieving their learning goals.

Student: The primary activity of a student is to study WebMentor courses. Prior to studying a course, a student must be registered in a session of the course. Prior to registering in a course session, a student must be enrolled in the WebMentor Enterprise Training System. Student enrollment is discussed in “Enrolling Organizations and Students” on page 33.

3 - Integrating WebMentor Training Server into Your Environment

Specifying Administration Entry Points

In versions of Webmentor Enterprise prior to Version 4.0, each role had its own entry point into the administration system. In addition to the entry points for each role, there were three additional entry points for enrolling a new organization, enrolling a new student and allowing students to enter via the Course Catalog. These entry points have been maintained in Version 4.0 for backward compatibility. However, Version 4.0 uses a single entry point for all roles.

A WebMentor entry point is actually a URL that invokes a Logon screen for a particular role. Every individual that enters the WebMentor Training System must specify a User ID and Password in a Logon screen. The User ID and Password are authenticated before the individual is granted access to the training system.

When integrating the WebMentor Enterprise Training Server into your training environment, you must provide a “front-end” consisting of one or more screens that permit users acting in the various roles to enter the WebMentor Administration System. How you structure this front-end is your decision, but some suggestions and examples are provided below.

The entry point for each role actually consists of a single file, **webmentor.cfm**, which you invoke with the command line variable **USER_ROLE=role** to specify the logon screen to be displayed.

| Entry Point | USER_ROLE= value |
|-----------------------------|------------------|
| Course Provider | PROVIDER |
| Organization | ORGANIZATION |
| Group | GROUP |
| Administrator | ADMINISTRATOR |
| Instructor | INSTRUCTOR |
| Student | STUDENT |
| New Organization Enrollment | NEW_ORGANIZATION |
| New Student Enrollment | NEW_STUDENT |
| Course Catalog | COURSE_CATALOG |

The **webmentor.cfm** file resides in a directory named **template** under the directory in which the WebMentor Enterprise Training Server is installed. In your front-end screen(s), you must reference this entry point file within a URL. For

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example, if the WebMentor Enterprise Training Server is installed in a directory named **training**, you might reference the Course Provider entry point from a screen containing the following HTML code fragment that uses the anchor (<a>) tag.

```
<a href="http://www.yoursite.com/training/template/webmentor.cfm?USER_ROLE=PROVIDER">Log in as a Course Provider</a>
```

The user will see the text Log in as a Course Provider as a hyperlink. When the user clicks on the hyperlink, the Course Provider Logon screen will be displayed. Of course, you can use buttons, icons or image maps to achieve a more pleasing user interface for your training environment.

The content of your URLs that will serve as entry points to the WebMentor Administration System will depend upon 4 things: the protocol used to transmit documents between the host web server and the user's web browser; your host web server's domain name, the path to the WebMentor entry point file, and the value of the **USER_ROLE=** variable. The path will depend upon where you installed the WebMentor Enterprise Training Server.

In the example above, **http** defines the transmission protocol, **www.yoursite.com** is the Internet domain name of the web server on which your training system is hosted, **training/template/webmentor.cfm** is the path to the entry point file, and **USER_ROLE=PROVIDER** specifies that you wish to display the Course Provider logon screen. Note that, in our example, the WebMentor Enterprise Training Server was installed in the **training** directory and the entry point file always resides in the **template** directory immediately below the installation directory.

This form of URL is known as an absolute URL. It includes the protocol, domain name and pathname of the file. Instead of an absolute URL, you may want to use a relative URL in your front-end screens to reference the WebMentor entry points. For example, you could reference the Student entry point in your front-end screens stored in the **training** directory as follows.

```
<a href="template/webmentor.cfm?USER_ROLE=STUDENT">Log in as a Student</a>
```

The user's browser will fill in the missing parts of the complete URL from the referencing file's URL. For this relative URL to work, your front-end file that references the WebMentor entry point file must be in the directory in which the WebMentor Enterprise Training Server is installed. This directory will sometimes be referred to as the "training root directory."

Specifying the Administration User Interface Type

The Webmentor administration system uses a menu driven, drill down approach to navigation. That is, a main menu is provided for each role that defines the functionality of that role. In some roles, submenus are used, as well. Functions are performed by selecting an item from the main menu and drilling down through screens that perform that function.

Navigation back along the drill-down path is available to re-enter information or perform certain functions multiple times.

In versions prior to Version 4.0, the navigation links were displayed vertically in the lower left corner of the page. The user interface for Version 4.0 still supports this layout as its default. However, the user interface for Version 4.0 also supports a framed mode of operation wherein the navigation links are displayed horizontally along the bottom of the browser window in a small frame.

Often, the unframed interface requires that a user scroll to the bottom of the page to access the navigation links. The framed interface maintains those same links in a small frame at the bottom of the browser window for easy accessibility.

The type of interface presented to a user is controlled by the `USER_INTERFACE` parameter in the entry point URL. If the `USER_INTERFACE` parameter is omitted or set to `UNFRAMED`, the pre-Version 4.0 unframed interface with navigation links in the lower left corner of the page will be displayed. If the `USER_INTERFACE` parameter is set to `FRAMED`, the new Version 4.0 framed interface with navigation links in a frame at the bottom of the browser window will be displayed.

For example, if you wanted to invoke the unframed user interface for the `STUDENT` role, the entry point URL would be as follows.

```
<a href="template/webmentor.cfm?USER_ROLE=STUDENT
&USER_INTERFACE=UNFRAMED">Log in as a Student</a>
```

Note that omitting the `USER_INTERFACE` parameter would achieve the same result.

If you wanted to invoke the framed user interface for the `INSTRUCTOR` role, the entry point URL would be as follows.

```
<a href="template/webmentor.cfm?USER_ROLE=INSTRUCTOR
&USER_INTERFACE=FRAMED">Log in as an Instructor</a>
```

Specifying Administration Exit Points

Because the WebMentor Administration System runs in a browser window, the user is always free to simply close the window. This approach to exiting WebMentor is perfectly acceptable and will cause no problems. However, the WebMentor Administration System offers some additional ways to exit.

When a WebMentor administration screen is displayed, a button bar is displayed on the left side of the screen. The button bar will always contain the items: **Main Menu**, **Display**, **Help** and **Mail**. When an item is active, it is white; when it is inactive, it is gray. The button bar may display the items **Exit** or **Close**, depending upon the method of exiting from the WebMentor Administration System selected by the Course Provider. Also, on the logon and main menu screens for each role, a navigation link **Return to Training Home Page** may be shown in the navigation area. This link can be used to exit from the WebMentor Administration System, as well.

The Course Provider establishes the default method used to exit from the WebMentor Administration System. How this is done is discussed in more detail in “Updating the Course Provider Information” on page 17. Briefly, the Course Provider can select from three different exit approaches.

1. Automatic closing of the browser window. If this approach is selected, the button bar will contain a **Close** button and the navigation link **Return to Training Home Page** will be shown on user logon and main menu screens. When either **Close** or the navigation link is clicked, the browser window is closed. This approach is useful when the WebMentor Administration System is run in a separate browser window from the front-end screens.
2. Go to a specified exit URL. If this approach is selected, the button bar will contain an **Exit** button and the navigation link **Return to Training Home Page** will be shown on user logon and main menu screens. When either **Exit** or the navigation link is clicked, the specified exit URL is invoked.
3. No exit! If this approach is selected, the button bar will contain an **Exit** button, but it will be inactive. The navigation link **Return to Training Home Page** will not be shown on user logon and main menu screens. Users must exit by closing the browser window.

Once the Course Provider has established the default exit approach, each organization may choose to use that default or establish their own exit strategy. This is done by logging on as the organization and selecting **Review your**

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Organization's Information. The Organization Information screen will be displayed. That screen contains an **Exit URL** field in which the organization may define its exit strategy in the same manner as described above for the Course Provider.

Enrolling Organizations and Students

There are two additional considerations when establishing your front-end user interface to the WebMentor Administration System. They involve allowing students and organizations to enroll themselves in the training system. The act of enrollment simply involves specifying information about the student or organization, including a desired User-ID and Password, that is saved in the Training Database. Currently, organization enrollment does not have to be approved. Once an organization or student has enrolled, they can logon through the standard entry points that you have provided in your front-end screens.

Before students can register for a course, the Course Provider must create one or more sessions for the course. The WebMentor Enterprise Training Server supports two types of course sessions: open sessions in which any enrolled student may register, if permitted by their organization, and private sessions in which only enrolled students from the organization sponsoring the session may register.

Organization Enrollment

If you do not plan to have organizations manage their own training, you do not have to provide access for organizations to enroll in your training program. However, at least one organization must be enrolled since every student that enrolls must be affiliated with an organization. WebMentor supports a default organization, referred to as the "Open Sessions Organization". This organization can be used for individual students who are not affiliated with any other organization or it may be the only organization and the one with which all students are affiliated. Its Organization ID must match the Open Organization ID in the Course Provider information screen. The default Organization ID for the Open Sessions Organization is OPENSESS, but you may change it to whatever the Organization ID is for your default organization. Notwithstanding its name, the Open Sessions Organization may be used like any other organization. It can be specified as the sponsoring organization for both open and private sessions.

If you do plan to allow organizations to enroll themselves and manage their own training, you must provide a reference in your front-end screens to the following entry point through a URL as described above.

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| Entry Point | USER_ROLE= value |
|-----------------------------|------------------|
| New Organization Enrollment | NEW_ORGANIZATION |

For example:

```
<a href="http://www.yoursite.com/training/template/webmentor.cfm?USER_ROLE=NEW_ORGANIZATION">Enroll as a New Organization</a>
```

Another approach to supporting multiple organizations that provides more control is to have the Course Provider enroll new organizations. To do this, you must log on as the Course Provider and select **Administrative Functions...** from the Provider Main Menu. Then select **Add a New Organization** from the Administrative Menu and the Add a New Organization screen will be displayed. Complete and submit the form to enroll a new organization.

When you enroll a new organization, you can specify it as a “master organization” or a conventional organization. If a master organization is enrolled, the master organization may log in and enroll conventional organizations for which it becomes the master organization.

Student Enrollment

The WebMentor Enterprise Training Server provides three methods by which students can be enrolled.

1. **Open Student Enrollment** - Students are allowed to enroll themselves and select their organization affiliation from a list of organizations that permit open enrollment.
2. **Controlled Student Enrollment** - Students are allowed to enroll themselves but they must supply an Enrollment Key to become affiliated with an organization. An organization may specify an Enrollment Key and provide that key to its students. An organization’s Enrollment Key can be changed at any time. The students must enter this key during the enrollment process. Once successfully enrolled, the student is affiliated with the organization.
3. **Restricted Student Enrollment** - Students from an organization cannot enroll themselves. They must be enrolled by an Administrator or Group Manager from the organization.

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Restricted Student Enrollment is always available to an organization. Administrators from the organization can enroll students at any time. You must decide whether or not your training program will support Open Student Enrollment and/or Controlled Student Enrollment. If you do plan to support one or both of these enrollment methods, you must provide a reference in your front-end screens to the following entry point through a URL as described above.

| Entry Point | USER_ROLE= value |
|------------------------|------------------|
| New Student Enrollment | NEW_STUDENT |

For example:

```
<a href="http://www.yoursite.com/training/template/webmentor.cfm?USER_ROLE=NEW_STUDENT">Enroll as a New Student</a>
```

This will permit students to enroll themselves in your training program. Organizations can then decide individually whether or not to allow their students to enroll themselves and whether or not to require Enrollment Key entry.

Student Entry Via the Course Catalog

Beginning with Version 3.18, the WebMentor Administration System supports student entry into the system via the Course Catalog. If you plan to support student entry via the Course Catalog, you must provide a reference in your front-end screens to the following entry point through a URL as described above.

| Entry Point | USER_ROLE= value |
|----------------|------------------|
| Course Catalog | COURSE_CATALOG |

For example:

```
<a href="http://www.yoursite.com/training/template/webmentor.cfm?USER_ROLE=COURSE_CATALOG&USER_ORGANIZATION=myorg">Display Course Catalog</a>
```

Note: See the next section for an explanation of why you must specify the USER_ORGANIZATION variable when entering through the Course Catalog.

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When a student enters through this entry point, the Course Catalog is displayed. The student may peruse the catalog to locate courses of interest. If the student attempts to register for a course, the Student Logon screen is displayed. If the student is an enrolled student, the student simply enters his or her Student ID and Password and the registration process is continued. If the student is not already enrolled, the student must click the **New Student Enrollment** button on the Student Logon screen. The New Student Enrollment screen will be displayed. When the student successfully completes the enrollment process, the registration process is continued. Once the student has completed the registration process, he or she will be logged on to the Training System.

Identifying a User's Organization to an Entry Point

Each of the entry points to the WebMentor Administration System recognizes a variable, `USER_ORGANIZATION`, that can be added to the entry point URL to identify the organization with which the user is affiliated. This is particularly useful when organizations have their own screen graphics or when an organization has specified unique fields for its New Student Enrollment form.

A sample URL for the student logon entry point specifying the student's organization, **myorg**, is shown below.

```
<a href="template/webmentor.cfm?USER_ROLE=STUDENT&
USER_ORGANIZATION=myorg">Enrolled Student</a>
```

This URL would be used in the front-end screen provided for students affiliated with the organization **myorg**.

Note that the `USER_ORGANIZATION` variable *must* be present in the URL for the Course Catalog entry point, i.e.,

```
webmentor.cfm?USER_ROLE=COURSE_CATALOG&
USER_ORGANIZATION=myorg
```

This is because the Course Catalog displays only those courses for which that student can register. The set of courses is determined by the student's organization affiliation and is based on the course sessions available to students affiliated with the organization and registration variables set by the organization.

If the `USER_ORGANIZATION` variable is not specified when a new student is enrolling, a list of all organizations allowing students to enroll themselves is displayed. The new student must select the organization with which he or she wishes to be affiliated. If the `USER_ORGANIZATION` variable is specified and is a master organization, only organizations having the specified organization as its

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master organization and the master organization's default organization, if any, will be shown in the organization list. If the `USER_ORGANIZATION` variable is specified and is not a master organization, no organization list is displayed. The New Student Enrollment form for the specified organization is displayed and, upon successful enrollment, the student will be affiliated with the specified organization.

Group IDs are unique only within an organization. Therefore, when a group logs in without specifying a `USER_ORGANIZATION` variable, a list of all organizations is displayed. Whoever is logging on as the group must select an organization from the list and then enter a valid Group ID and Password for a group in the selected organization.

If a user logs in with a `USER_ORGANIZATION` variable that is a master organization, the organization list contains only organizations for which the specified organization is the master. If the `USER_ORGANIZATION` variable is not a master organization, no organization list is displayed. However, the Group ID and Password entered must be for a valid group in the specified organization.

Customizing your New Student Enrollment Form

The WebMentor Administration System permits each organization to define the fields in its New Student Enrollment form. This can be done from the Organization Main Menu. Three fields always appear in every New Student Enrollment form: **Student ID**; **Password**; and **Your Name** (new student's name). A default New Student Enrollment form containing fifteen additional fields is provided for every organization when it enrolls. An organization may use the default form or create its own form using some, all or none of the default fields and adding any new fields that it requires.

If more than one organization permits its students to enroll themselves, the New Student Enrollment form (displayed when the **`webmentor.cfm?USER_ROLE=NEW_STUDENT`** entry point is invoked or a student clicks the **New Student Enrollment** button on the Student Logon screen) will contain only the **Student ID**, **Password** and **Your Name** fields, along with a pull-down list of organizations that permit students to enroll themselves. Once the new student enters the mandatory information, selects his or her organization and enters the selected organization's Enrollment Key, if required, the organization-specific part of the New Student Enrollment form is displayed.

It is possible to limit the list of organizations from which a student must select or have the entire New Student Enrollment form for an organization displayed immediately by adding the variable `USER_ORGANIZATION` to the URL that

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invokes the **webmentor.cfm?USER_ROLE=NEW_STUDENT** entry point. If the **USER_ORGANIZATION** variable is set to an ID of a master organization, only organizations belonging to the specified master organization (and the master organization's default organization, if any) will be shown in the pull-down list of organizations from which the new student may select. If the **USER_ORGANIZATION** variable is set to the Organization ID of an organization that is not a master organization, the entire New Student Enrollment form for the specified organization will be displayed immediately. For example, if the organization whose Organization ID is XYZ is not a master organization, the URL

```
<a href="http://www.yoursite.com/training/template/webmentor.cfm?USER_ROLE=NEW_STUDENT&USER_ORGANIZATION=XYZ">New Student</a>
```

will cause the New Student Enrollment form for the organization having an Organization ID of XYZ to be displayed when the New Student link is clicked. To use this approach, each organization permitting their students to enroll themselves must have a separate front-end page for new student enrollment and/or student logon, since the value of the **USER_ORGANIZATION** variable must be set to the appropriate Organization ID.

Student Registration

A student must be enrolled before he or she can register or be registered for a course. Student registration is always done for a session of a course. Each session of a course may have different attributes, including its type as Open or Private.

Enrollment of a student always affiliates a student with an organization.

Organizations can control whether or not it allows its students to register for open sessions. It can also control whether or not it allows its students to register themselves for private sessions sponsored by the organization. Four types of private sessions are available to organizations.

- **OPEN** - Session is open to all enrolled students, if permitted to register for open sessions by their organization. If there is a registration fee, students may pay the fee themselves or use a Registration Key from an approved Training Order submitted by their organization.
- **PRIVATE** - Session is open only to enrolled students affiliated with the sponsoring organization. If there is a registration fee, students may pay the fee themselves or use a Registration Key from an approved Training Order submitted by their organization.

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- **PRIVATE - Student Pays** - Session is open only to enrolled students affiliated with the sponsoring organization. If there is a registration fee, students must pay the fee. Approved Training Orders from the sponsoring organization can only be used by Course Administrators to register Students.
- **PRIVATE - Organization Pays** - Session is open only to enrolled students affiliated with the sponsoring organization. If there is a registration fee, students must use a Registration Key from an approved Training Order submitted by the sponsoring organization. Pre-payment is done by an organization through a Training Order. Payment for a Training Order may be done by credit card or by approval of the Course provider. The Registration Key provided to students is the Purchase Order Number of the Training Order.
- **PRIVATE - Auto-Register** - Session is open only to enrolling students affiliated with the sponsoring organization. Provided there is space in an Auto-Register session and the session registration dates permit, students enrolling in the Training system are immediately registered in all Auto-Register sessions sponsored by the organization with which they are affiliated. Any number of Auto-Register sessions may be created for a course. In fact, any number of Auto-Register sessions may be created for the same course and sponsoring organization. If more than one Auto-Register session exists for a course and sponsoring organization, students are automatically registered in the lowest numbered available Auto-Register session. If there is a registration fee, an approved Training Order for the course session submitted by the sponsoring organization must exist or students will not be registered when they enroll.

WebMentor's Electronic Commerce Model

The WebMentor Administration System supports several methods for student payment of registration fees. The Course Provider can select from various payment methods and change the payment method whenever necessary.

WebMentor supports 3 basic methods of student payment for course registration.

1. **E-mail** - The student e-mails the required registration information to the Course Provider. The Course Provider must approve the student's registration request via the Course Provider interface.
2. **Phone or FAX** - The student phones or FAX's the required registration information to the Course Provider. The Course Provider must approve the student's registration request via the Course Provider interface.

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3. **Credit Card** - The student enters his or her credit card information into the form provided in the WebMentor Administration System. The Course Provider has two options for processing credit card information.
 - **Local** - Credit card information must be processed by the Course Provider in whatever manner is appropriate. When the credit card information has been verified, the Course Provider must approve the student's registration request via the Course Provider interface.
 - **Online Payment Service** - Webmentor currently supports VeriSign (formerly CyberCash) and E-xact online credit card payment services. Student registration occurs immediately upon approval of the credit card information by the online payment service. Before WebMentor can process credit card payments via an online payment service, one or more merchant accounts must be established with the service and the associated merchant account information entered into Webmentor. One or more merchant accounts may be set up in Webmentor for either VeriSign or E-xact or both. After setting up one or more merchant accounts in Webmentor, an e-commerce model must be defined for each organization using electronic commerce. An e-commerce model establishes a link between an organization and the merchant account to be used to process that organization's payments. To simplify this process, a default model may be established. If an e-commerce model is not established for an organization, it will use the default model for its payment processing.

The Course Provider can select any combination of payment methods, e-mail, phone or FAX and credit card. If credit card is one of the selected payment methods, the Course Provider must select local or one of the online payment services.

If credit card processing is selected as a payment method, a credit card transaction is recorded in the Training Database whenever a student registers for a course using a credit card. The electronic commerce support in the WebMentor Administration System provides transaction reports and accounting reports by course or organization.



4 Customizing the WebMentor Administration System Interface

The WebMentor Administration System handles user logons, student enrollment and course registration, reporting and all other administrative activities associated with administering a training environment. It does not deal with course authoring or delivery, but it does provide the interface through which students enter courses for which they are registered.

WebMentor is a role based system that supports the following six roles:

- **Course Provider:** The Course Provider has the responsibility of administering the training environment.
- **Organization:** WebMentor provides facilities for any number of organizations to independently manage their own training.
- **Group:** Groups provide a way for an organization to manage its students independent of the courses for which they are registered.
- **Administrator:** Administrators control course sessions for their Organization.
- **Instructor:** Instructors monitor the progress, activity and achievement of students in course sessions.
- **Student:** The primary activity of a Student is to study WebMentor courses.

The WebMentor Administration System provides support for the administrative activities associated with each of these roles.

Modifying the Administration System Interface

The Administration System Interface displays a button bar along the left side of the window containing the **Main Menu**, **Display**, **Mail**, **Help** and **Exit** or

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Close buttons. When these buttons are white, they are active. When they are gray, they are inactive.

The interface also displays a set of tabs across the top of the window specifying the various roles supported by the WebMentor Administration System. When a tab is gold, it is active and the currently selected role. When a tab is white, it is active and can be used to switch roles. When it is gray, it is inactive.

The layout and colors used by the Administration System interface can be customized by individual users, if permitted by the Course Provider. The Course Provider can set a default look for the administration interface and control whether or not individual users can customize their interface. The Course Provider can also control which roles, if any, will have active role tabs displayed.

Setting a Default Administration Interface

All Administration System screens contain a button bar displayed at the left side of the screen. Once logged on, the Course Provider's pad will always contain an active **Display** button. Clicking the **Display** button opens the Personal Display Settings Window.

In the Personal Display Settings Window, the Course Provider can set the default colors and layout for the Administration System interface. Whatever look the Course Administrator specifies becomes the default interface for all users. The Course Provider can change this default interface at any time using the Personal Display Settings Window.

Controlling User Customization

To control whether or not individual users can customize their Administration System interface, the Course Provider must access the Course Provider Information screen. To access this screen, the Course Provider selects **Administrative Functions...** from the Provider Main Menu. Then, from the Administrative Menu, select **Review your Provider Information**. The Provider Information screen will be displayed.

The Provider Information screen contains a checkbox field titled *Allow students, instructors, administrators and groups to change their display*. If the box is checked, the **Display** button will appear in white on the button pad on the Administration System screens for every user. This will allow users to access the Personal Display Settings window to customize their Administration System interface.

If the box is not checked, the **Display** button will appear in gray on the button pad and will be inactive, except for the Course Provider's and Organization's screens where it will be displayed in white and be active. Therefore, the default

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look set by the Course Provider will be the Administration System interface for all users unless overridden by an Organization for its users. (See the next section for information about how an Organization can override Course Provider interface settings.)

Note that to change the setting, or any field, in the Course Provider Information screen, you must click the **Change** button at the bottom of the form.

Setting a Default Interface for an Organization

Like the Course Provider, an Organization's button pad will always contain an active **Display** button. Clicking the **Display** button opens the Personal Display Settings Window.

In the Personal Display Settings window, the Organization can set the default colors and layout for the Administration System interface to be displayed to its Groups, Course Administrators, Course Instructors and Students. An Organization can always override the default interface set by the Course Provider. However, the setting made by the Course Provider to allow or disallow changes to the interface by Groups, Course Administrators, Course Instructors and Students cannot be changed by an Organization. An Organization can change its default interface at any time using its Personal Display Settings window.

Configuring the Role Tab Interface

The Administration System provides a role tab interface that permits users to change roles more easily. When the role tab interface is active, a set of tabs for the various roles supported by the Administration System is displayed in white above the screen title. The currently selected role is always displayed in gold. Clicking a tab allows the user to change roles.

For the Student, Instructor, Administrator and Group roles, a user can change roles without logging on if the user has the same ID, Password and Organization in the target role as in the current role. If so, the Main Menu for the target role is displayed. Otherwise, the logon screen for the target role is displayed and the user must logon in the target role. When the Organization or Provider role is the target role, the user must have the same ID and Password as in the current role.

If a user enters in a role that has the role tab interface active, he or she will maintain the active role tab interface even in roles for which it is not active. The state (active/inactive) of the role tab interface is set when a user logs on and is maintained until that user logs on again.

The Course Provider can control which roles have active role tabs as follows.

1. Enter WebMentor as the Course Provider.

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2. When the Provider Logon screen is displayed, enter the Provider ID and Password for the Course Provider and click the **Enter** button.
3. The Provider Main Menu screen will be displayed. Click **Administrative Functions...**
4. The Administrative Menu screen will be displayed. Click **Review your Provider Information**.
5. In the Provider Information screen, click the appropriate radio button under **Activate Tab Style Interface for:** to specify which roles will have an active role tab interface. You may not want to give Students access to the role tab interface since they seldom act in other roles. You can change your selection at any time.

Customizing Icons and Buttons

The design of the WebMentor Administration System intentionally minimizes the use of elements that would significantly reduce system response time. Frames are used only in auxiliary windows such as the Help and Mail windows. Icons and buttons are small and used sparingly.

However, there are icons and buttons used in the Administration System screens that you might want to change. To do so, you may replace image files in the Images directory after the WebMentor Enterprise Training Server has been installed. This will cause the replaced images to be displayed on all screens.

You may want to customize certain images for individual organizations. You can do this by creating a directory below the Images directory having the organization's Organization ID as the directory name. For example, if you wanted to use a specific set of images for XYZ Corporation having an organization ID of XYZCORP, you would create a directory named **xyzcorp** below the **Images** directory and copy all of the images from the **Images** directory into it. You would then replace the images in the **xyzcorp** directory with the XYZ Corporation specific images. Then, only the XYZ Corporation organization, its groups, administrators, instructors and students would see the XYZ Corporation specific images. You can do this for as many organizations as you want.

Note that once you create an organization-specific image directory, all images for that organization, its groups, administrators, instructors and students are retrieved from this directory. If an organization does not have its own image directory, its images are retrieved from the **Images** directory.

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The structure of the screens in the Administration System is always the same. Every screen contains:

- the logo area at the top left
- the button area on the left side below the logo area
- the role tab area at the top center
- the title area at the top center below the role tab area
- the content area to the right of the button pad and below the title area
- the navigation area below the content area
- the contact area below the navigation area

As delivered, the Administration System screens display the Avilar logo in the logo area. You may want to replace the Avilar logo with an icon of your own. You can do this by replacing the following file in the **Images** directory below the training root directory. You may also create a subdirectory of the **Images** directory for a specific organization and replace the logo file in that subdirectory with the logo of the organization. We suggest that you save the old file in case a problem arises.

| Icon | File | Size (w x h) |
|-------------|--------------|--------------|
| Avilar logo | corplogo.gif | 99 x 40 |

Note: The width of the logo image should be less than 110 pixels. The image may have any height.

The Webmentor logo bar and role tabs are displayed across the top of the screen. The role tabs have both ON and OFF images for all roles. The images displayed in this area are as follows.

| Icon | File | Size (w x h) |
|-------------------------|-----------------------|--------------|
| WebMentor logo bar | role_top_logo.gif | 612 x 30 |
| Student tab active | studentON_tab.gif | 612 x 18 |
| Student tab inactive | studentOFF_tab.gif | 612 x 18 |
| Instructor tab active | instructorON_tab.gif | 612 x 18 |
| Instructor tab inactive | instructorOFF_tab.gif | 612 x 18 |

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| Icon | File | Size (w x h) |
|----------------------------|--------------------------|--------------|
| Administrator tab active | administratorON_tab.gif | 612 x 18 |
| Administrator tab inactive | administratorOFF_tab.gif | 612 x 18 |
| Organization tab active | organizationON_tab.gif | 612 x 18 |
| Organization tab inactive | organizationOFF_tab.gif | 612 x 18 |
| Provider tab active | providerON_tab.gif | 612 x 18 |
| Provider tab inactive | providerOFF_tab.gif | 612 x 18 |
| Group tab active | groupON_tab.gif | 612 x 18 |
| Group tab inactive | groupOFF_tab.gif | 612 x 18 |

The active and inactive tab images are displayed as an image map having the following coordinates.

| Icon | File | Image Map Coord. |
|----------------------------|--------------------------|------------------|
| Student tab active | studentON_tab.gif | 82, 1, 154, 16 |
| Student tab inactive | studentOFF_tab.gif | 82, 1, 154, 16 |
| Instructor tab active | instructorON_tab.gif | 154, 1, 242, 16 |
| Instructor tab inactive | instructorOFF_tab.gif | 154, 1, 242, 16 |
| Administrator tab active | administratorON_tab.gif | 242, 1, 356, 16 |
| Administrator tab inactive | administratorOFF_tab.gif | 242, 1, 356, 16 |
| Organization tab active | organizationON_tab.gif | 356, 1, 464, 16 |
| Organization tab inactive | organizationOFF_tab.gif | 356, 1, 464, 16 |
| Provider tab active | providerON_tab.gif | 464, 1, 540, 16 |
| Provider tab inactive | providerOFF_tab.gif | 464, 1, 540, 16 |
| Group tab active | groupON_tab.gif | 540, 1, 610, 16 |
| Group tab inactive | groupOFF_tab.gif | 540, 1, 610, 16 |

If you do not want to use the role tabs, you can use your Course Provider account to turn them off for all roles. In that case, you should replace the ***_tabOFF.gif** files with another image.

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The button area on the left side of the screen consists of some combination of the following image files.

| Icon | File | Size (w x h) |
|---------------------------|---------------------|--------------|
| Button pad top | pad_topON.gif | 88 x 116 |
| Active Main Menu button | pad_mainmenuON.gif | 88 x 26 |
| Inactive Main Menu button | pad_mainmenuOFF.gif | 88 x 26 |
| Active Help button | pad_helpON.gif | 88 x 31 |
| Inactive Help button | pad_helpOFF.gif | 88 x 31 |
| Active Display button | pad_displayON.gif | 88 x 31 |
| Inactive Display button | pad_displayOFF.gif | 88 x 31 |
| Active Mail button | pad_mailON.gif | 88 x 33 |
| Inactive Mail button | pad_mailOFF.gif | 88 x 33 |
| Active Close button | pad_closeON.gif | 88 x 31 |
| Inactive Close button | pad_closeOFF.gif | 88 x 31 |
| Active Exit button | pad_exitON.gif | 88 x 31 |
| Inactive Exit button | pad_exitOFF.gif | 88 x 31 |
| Button pad bottom | pad_bottomON.gif | 88 x 26 |

The button pad top icon is always displayed followed by five active or inactive button icons. Finally, the button pad bottom icon is displayed.

You may want to replace the button pad with a button bar of your own. You can do this by replacing the files above in the **Images** directory below the training root directory. You may also create a subdirectory of the **Images** directory for a specific organization and replace the button bar files in that subdirectory. We suggest that you save the old files in case a problem arises.

Note: The width in pixels of your logo icon and any button bar icons you use must be less than 110.

Customizing Menus and Special Display Files

The WebMentor Enterprise Server menus are stored in an editable form in the menus directory under the training root directory. Each menu file is a Cold Fusion template that contains an HTML list item `` entry for each item in the menu. To remove an item from a menu, simply delete the corresponding `` entry from the appropriate menu file and save the file. We recommend that you use a text editor such as Notepad to edit the menu files. An original copy of each menu file is stored in the **originals** directory below the **Menus** directory. Changing the menu files in the **Menus** directory will cause the edited menus to be displayed to all users.

Like images, you may want to customize certain menus for individual organizations. You can do this by creating a directory below the **Menus** directory having the organization's Organization ID as the directory name. For example, if you wanted to use a specific set of menus for XYZ Corporation having an organization ID of XYZCORP, you would create a directory named **xyzcorp** below the **Menus** directory and copy all of the menus from the **Menus** directory into it. You would then edit the menus in the **xyzcorp** directory as required for XYZ Corporation. Then, only the XYZ Corporation organization, its groups, administrators, instructors and students would see the XYZ Corporation specific menus. You can do this for as many organizations as you want.

Note that once you create an organization-specific menu directory, all menus for that organization, its groups, administrators, instructors and students are retrieved from this directory. If an organization does not have its own menu directory, its menus are retrieved from the **Menus** directory.

The menu files are described below.

- **student_menu.cfm** - contains the menu items in the non-Classroom section of the Student Main Menu.
- **course_menu.cfm** - contains the static menu items in the Course Classroom Menu.
- **instructor_menu.cfm** - contains the menu items from the top section of the Instructor Main Menu.
- **instructor_reports_menu.cfm** - contains the menu items from the Student Reports section of the Instructor Main Menu.
- **administrator_menu.cfm** - contains the menu items from the top section of the Administrator Main Menu.

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- **administrator_reports_menu.cfm** - contains the menu items from the Student Reports section of the Administrator Main Menu.
- **group_menu.cfm** - contains the menu items from the top section of the Group Main Menu.
- **group_reports_menu.cfm** - contains the menu items from the Student Reports section of the Group Main Menu.
- **organization_menu.cfm** - contains the menu items from the top section of the Organization Main Menu.
- **organization_reports_menu.cfm** - contains the menu items from the Reports section of the Organization Main Menu.
- **master_organization_menu.cfm** - contains the menu items from the top section of the Master Organization Main Menu.
- **master_organization_reports_menu.cfm** - contains the menu items from the Reports section of the Master Organization Main Menu.

The WebMentor Administration System supports certain special display files which, if present, cause information to be displayed on various screens. If the files are not present, or renamed, either no information is displayed or default information is displayed. The special display files are described below.

- **new_student_intro.cfm** - contains text that is displayed above the New Student Enrollment form. If this file is not present, default text is displayed.
- **student_classrooms.cfm** - contains text that is displayed in place of the Classrooms heading on the Student Main Menu.
- **student_menu_intro.cfm** - contains text that is displayed above the menu items in the Course Classroom menu for each course. If this file is not present or is empty, no additional text is displayed above the menu items.
- **verisign_intro.cfm** or **e-xact_intro.cfm** - contain text that is displayed on the credit card information entry screen above the form into which the credit card information is entered. The file that is used, **verisign_intro.cfm** or **e-xact_intro.cfm**, depends upon the credit card service that will process the credit card payment request. If the file does not exist, no additional text is displayed above the form on the credit card information entry screen.

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- **verisign_charge_info.cfm** or **e-xact_charge_info.cfm** - contain text that is displayed on both the credit card information entry screen and the successful credit card charge screen. The file that is used, **verisign_charge_info.cfm** or **e-xact_charge_info.cfm**, depends upon the credit card service that processed the credit card payment request. Normally, this file would contain information about what the purchaser should expect to see on their credit card statement. If this file is not present or empty, no additional text is displayed on the credit card information entry screen or the successful credit card charge screen.

The special display files can be placed in organization specific menu directories and edited for individual organizations, the same as the menu files.



5 Installing and Configuring a New Course

After successfully installing and configuring the WebMentor Enterprise Training Server, you will want to install one or more courses. The WebMentor Administration System provides the facilities for a Course Provider to quickly and easily install a new course and create sessions in which students may register.

WebMentor courses are created by the WebMentor Personal Authoring Server (WebMentor Author). When a course has been completed, it is published by the author using facilities within WebMentor Author. A course is published as a zip file.

The zip file that contains the new course must be stored in the import directory under the directory in which the WebMentor Training Server was installed. Note that if you have installed other courses, the import directory may contain other course files and subdirectories. You do not have to delete them, although you may.

Installing a Course

To install a new course, you must enter the WebMentor Administration System in the Course Provider role. To do so, follow these steps.

1. Start your browser and set the location URL to your front-end file that provides access to the Course Provider or to the **provider.html** file in the directory in which WebMentor was installed.
2. When the Provider Logon screen is displayed, enter the Provider ID and Password for the Course Provider and click the **Enter** button.
3. The Provider Main Menu screen will be displayed. Click **Course/Session Management...**
4. The Course/Session Management Menu screen will be displayed. Click **Install a New Course**.

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5. The New Course Installation screen will be displayed. You must enter the Course Number of the course to be installed. The Course Number must be from 1 to 8 characters in length with no embedded blanks. The Course Number must match the file name of the zip file of the published course stored in the **import** directory. If you are installing the new course on a system where file names are not case sensitive (Windows NT), it is preferable, but not necessary, to enter the Course Number in upper case (e.g., PSYCH101). After entering the Course Number, click the **Load** button.
6. If you are using SQL Server or Oracle to manage WebMentor databases, the New Course Installation screen will display a field in which you must enter the password for the **webmentor** user account in SQL Server or Oracle. After entering the Course Number and **webmentor** user account password, click the **Load** button.
7. If a course having the same Course Number exists, the Existing Course screen will be displayed. You may delete the current course before installing a new course having the same Course Number or you may simply replace the existing course material with the new course material. If you delete the existing course, all course, session, student and conference information associated with the course will be deleted, as well. This includes student registrations in the course, the course conference, if any, assessment test results, if any, and student progress information. Students will have to re-register for the new course and a new course conference will have to be created if the existing course is deleted. If you replace the course material only, the structure of the new course and the content of the assessment tests, if any, must be the same as the existing course. Otherwise, student progress information and any existing test results will be inaccurate. If you want to maintain both the old and new versions of the course, the course author must re-publish the course with a new Course Number prior to its installation on the WebMentor Training Server. Click the **Delete** button if you want to delete the current course and its attendant information prior to installing the new course. Click the **Replace** button if you want to replace the existing course material with the new course material.
8. If you clicked the **Delete** button in the Existing Course screen, the Course Deletion Verification screen will be displayed. If you are re-installing an existing course and want to delete all course, session and student information associated with the existing course, click the **Verify** button. If you simply want to replace the course material and retain all the other course related information, go back to the Existing Course screen and click the **Replace** button. If, however, you want to maintain the old version of the course with its session and student information, the new

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version of the course must have a different Course Number. Abort the course installation by returning to the Course/Session Management Menu screen. You must contact the course author and request that a new Course Number be assigned to the course and the course re-published.

9. If no course exists having the same Course Number or you have deleted the existing course, the course delivery file will be unzipped. When the unzip operation has completed, the Course Information screen will be displayed. This screen contains a form into which you must enter the following information: the course E-mail address which is usually the Course Instructor's e-mail address; the per-student Price of the course; and, the Course Type. Only courses with a course type of SOLD will appear in the Course Catalog when a student attempts to register for a course or an organization attempts to order training. Course types of DEMO and OTHER may be used for demonstration courses or in any other manner you deem useful. When you have completed entering information into the form, click the **Update** button.
10. If the course completed installation in the Wait Time specified in the Course Information screen, the Course Installed screen will be displayed. This indicates that the course installed successfully and the course information was updated in the Training Database. If the course did not complete its installation, the No Database Entry screen will be displayed.

If the No Database Entry screen is displayed, it indicates that no entry was found for the course in the Training Database so the course information was not updated in the Training Database. An error message should be displayed if the course was not installed. Also, an e-mail message containing the course installation log file should have been sent to the e-mail address in the **E-Mail** field shown in the Course Provider information screen. Search this file for "ERROR" to locate the condition(s) that caused the course installation to fail. The author will probably have to correct the error(s) using WebAuthor and re-publish the course before you can re-install it.

To ensure that a course has installed successfully and to update any course information in the Training database, follow the steps below.

1. Return to the Course/Session Management Menu screen and click **Review Course Information**.
2. If more than one course is currently installed, the Course Selection screen will be displayed containing a list of the installed courses. If only one course is currently installed, its Course Information screen will be displayed. If the Course Selection screen does not list your new course or the Course Information screen is not for your new course, it was not

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installed successfully. Attempt to install the new course again. If problems persist, contact Avilar Technologies, Inc.

3. If the Course Selection screen is displayed and your course is listed, click on your new course in the list and click the **Select** button.
4. The Course Information screen will be displayed for the new course. Ensure that the E-mail, Provider ID, Price and Course Type fields are correct. The User ID of the Course Provider must be stored in the Provider ID field. If you modify any of the course information fields, click the **Change** button to update the information in the Training Database.

Creating a Course Session

Before students can register for a course, the Course Provider must create one or more sessions for the course. A session may be an open session or a private session. Open sessions are available for registration to students affiliated with an organization that allows their students to register for open sessions. Private sessions are available for registration only to those students affiliated with the Organization sponsoring the session.

To create a session for an installed course, you must enter the WebMentor Administration System in the Course Provider role. To do so, follow these steps.

1. Start your browser and set the location URL to your front-end file that provides access to the Course Provider or to the **provider.html** file in the directory in which WebMentor was installed.
2. When the Provider Logon screen is displayed, enter the Provider ID and Password for the Course Provider and click the **Enter** button.
3. The Provider Main Menu screen will be displayed. Click **Course/Session Management...**
4. The Course/Session Management Menu screen will be displayed. Click **Add a Course Session**.
5. If more than one course is currently installed, the Course Selection screen containing a list of installed courses will be displayed. If only one course is installed, the New Session Information screen for that course will be displayed. If the Course Selection screen is displayed, click on the course in the list for which you want to create a new session and click the **Select** button.

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6. The New Session Information screen for the selected course will be displayed. The **Assigned Session Numbers** field tells you what sessions, if any, already exist for the course. In the New Session Number field, you must enter a session number that does not duplicate an existing session number for the course. In the **Organization ID** field, select the Organization sponsoring the session. Set the **Session Type** field to OPEN or one of the PRIVATE session types. Note that any Organization may sponsor an open session that would be available for registration to all enrolled students, not just those affiliated with that Organization. You may specify a start and/or end date for session registration and for the session itself. Alternatively, you may specify a time-to-complete from the student's time of registration. In the **Maximum Students** field, you must specify the maximum number of students that can be registered in this session. If a student attempts to register in a session that is full, the registration request will be rejected. When you have completed the entries in the form, click the **Submit** button to create the new session.



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6 Running Periodic Maintenance Tasks

WebMentor supports three tasks that can be run periodically. These tasks provide functionality that may be required at your installation for:

- optimizing conference search collections
- checking for student course completion
- awarding credits and certifications for completed courses
- de-registering students who have completed a course

By running these tasks periodically, you can automate some of the maintenance activity required to keep your installation operating efficiently.

Not all of these tasks may be required at your installation. For example, if your installation does not use WebMentor conferencing, there is no need to optimize the conference search collections. If your installation does not monitor and recognize student course completion, there is no need to check for student course completion, de-register students who have completed a course, or issue credits or certifications to students who have completed a course.

Installing Periodic Tasks

Each of these tasks is installed in the same way using the Cold Fusion Administrator. To initiate this installation process, you must start the Cold Fusion Administrator. To do so, follow these steps:

1. Select **Programs** from the Windows Start menu.
2. Select **WebMentor Enterprise Server** from the Programs menu.
3. Select **Cold Fusion Administrator** from the WebMentor Enterprise Server submenu.

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4. When the Cold Fusion Administrator cover screen is displayed, enter **webmentor** as the Administrator password and click the **Submit** button. The main Cold Fusion Administrator screen will be displayed.

A menu appears on the left side of the browser window in the main Cold Fusion Administrator screen. Click the **Scheduler** button to display the Cold Fusion Scheduler screen and follow the steps below for each periodic task that you want to install.

1. Enter a name for the periodic task in the **Task Name** field. We recommend the following task names but you can use any name that you want.
 - a. **Confoptimize** - Optimize conference search collection
 - b. **Completion** - Check student course completion
 - c. **Certification** - Award credits and certifications
 - d. **Deregister** - De-register completed student courses
2. Make sure the **Operation** field contains **HTTPRequest**.
3. Click the **Add New Task** button.

The Add Scheduler Task screen is displayed. You must specify the parameters that will control the periodic operation of the task. You can choose the periodicity that is best for your installation. We recommend the following configuration.

1. Enter the date on which you want the periodic task to start running in the **Start Date** field following **Duration**.
2. Click the **Recurring** radio button and select **Daily** from the pull down list next to it.
3. Enter the time-of-day that you want the task to start running each day in the time field associated with the **Recurring** option. This time should be early in the morning when no users are accessing the Training System. We recommend the following local time settings.
 - Confoptimize - 02:00:00
 - Completion - 02:30:00
 - Certification - 03:30:00
 - Deregister - 04:30:00

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The tasks should be started in the order shown above. The Completion task should end before the Certification task starts. The Certification task should end before the Deregister task begins. E-mail messages are sent to the Course Provider by each of these tasks. These messages contain the task's start time, what actions were performed and its stop time. Based on this information, you can adjust the start times for your site as necessary.

4. Enter the URL to the Cold Fusion template that will perform the periodic processing in the **URL** field. The following templates in the **template** directory are used to implement the periodic tasks.
 - Confoptimize - **confoptimize.cfm**
 - Completion - **completion.cfm**
 - Certification - **certification.cfm**
 - Deregister - **deregister.cfm**

The URL should point to the appropriate template. For example:

```
http://www.yoursite.com/webmentor/wwwroot/template/  
confoptimize.cfm
```

5. Enter a large number (e.g., 6000) in the **Request Timeout** field.
6. Click the **Create** button to add the periodic task.

The Conference Search Collection Optimization Task

This periodic task is implemented by the **confoptimize.cfm** template. When invoked, it optimizes the Verity search collections associated with WebMentor conferences. If you are using WebMentor conferences, these search collections should be optimized periodically to insure efficient posting and searching of messages.

Each time this template runs, it writes a file named **confoptimize.txt** to the **cgi-bin** directory under the WebMentor root directory. This file indicates that the template has run. Its contents are also sent to the e-mail address in the **E-Mail** field in the Course Provider information.

The Course Completion Checking Task

This periodic task is implemented by the **completion.cfm** template. When invoked, it locates all courses for which course completion criteria exist. Course

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completion criteria can be set on a course level or a session level by the Course Provider or an Instructor.

For any course for which course completion criteria exist, all students registered in the course who have not completed the course are checked to determine if they have satisfied the course completion criteria. If a student has satisfied the completion criteria, the current date/time is stored in the `DATE_COMPLETED` field in the student's `MATRICULATION` table record indicating that the student has successfully completed the course.

This task also awards credits and certifications for course completions based on satisfying completion criteria established for a course. The awarding of credits and certifications for course completions set from within a course is performed by the Certification task (see below). The awarding of credits and certifications for course completions set by an Instructor is done when the Instructor marks the student as having completed the course.

Each time this template runs, it writes a file named **completion.txt** to the **cgi-bin** directory under the WebMentor root directory. This file indicates the number of students that have been marked as successfully completing each course. Its contents are also sent to the e-mail address in the **E_Mail** field in the Course Provider information.

The Credits and Certifications Awarding Task

This periodic task is implemented by the **certification.cfm** template. When invoked, it performs two functions. First, it locates all students for which course completion has been set from within a course since the last time the Certification task was run. It then determines whether any credits or certifications are awarded for completion of any of the courses completed by the students since the last time the Certification task was run. If so, it awards the appropriate credits or certifications to the students and sends a notification-of-award message to the e-mail address, if any, specified for award notification when the credit or certification is awarded.

Note that this task only awards credits and certifications for course completions set from within a course. The awarding of credits and certifications for course completions set by an Instructor is done when the Instructor marks the student as having completed the course. The awarding of credits and certifications for course completions based on satisfying completion criteria established for a course is done when the Completion task is run (see above).

The second function of the Certification task is to send e-mail messages to students notifying them that a credit or certification previously awarded to them is

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about to expire or has expired. The Course Provider controls whether or not a warning message is sent and how many days prior to the expiration of a credit or certification it is sent by specifying or omitting the number of days in the Course provider information. The Course provider also controls whether or not an e-mail message is sent to students upon expiration of previously awarded credits and certifications.

Each time this template runs, it writes a file named **certification.txt** to the **cgi-bin** directory under the WebMentor root directory. This file indicates the number of students that have been awarded credits or certifications. Its contents are also sent to the e-mail address in the **E-Mail** field in the Course Provider information.

The Student De-Registration Task

This periodic task is implemented by the **deregister.cfm** template. When invoked, it locates all courses for which automatic de-registration has been selected. Automatic student de-registration can be set by the Course Provider on a course or session level. It can be set to automatically de-register students immediately upon successful completion of a course or some number of days after completion. Note that course completion can be set for a student automatically by the Completion task described above, by a course or manually by an Instructor.

For any course for which automatic student de-registration has been selected, all registered students whose date of completion is earlier than the de-registration date are located and then de-registered from the course. If course transcripts are being maintained for the course, the course transcript information is written for the de-registered students. The students will remain registered in any other courses that they have not completed.

Each time this template runs, it writes a file named **deregister.txt** to the **cgi-bin** directory under the WebMentor root directory. This file indicates the number of students that have been de-registered from each course. Its contents are also sent to the e-mail address in the **E-Mail** field in the Course Provider information.



6 - Running Periodic Maintenance Tasks

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Upgrading WebMentor Enterprise Server

To upgrade WebMentor Enterprise Server to a later version, you must first download the update file from the Avilar web site. If you do not have the URL for the WebMentor Enterprise Server update page, contact Avilar Technical Support. Once you have the URL, follow the steps below to update your training server.

1. Download the update file for your installation from the WebMentor Enterprise Server upgrade page.
2. Store the downloaded update file in the **update** directory under your training root directory. If the **update** directory does not exist, create it.
3. Log into WebMentor as the Course Provider.
4. On the Provider Main Menu screen, click **Administrative Functions...**
5. Click **Review your License Information**.
6. If your copy of the WebMentor Enterprise Server has been properly registered and licensed, an **Update** button is displayed below your license information. Click the **Update** button.
7. The update file that you downloaded and stored in the **update** directory updates your training server. A message will be displayed notifying you of the results of your update attempt. If an error occurs, contact technical support at Avilar Technologies, Inc.



7 - Upgrading WebMentor Enterprise Server
