Version 8 Setup Review

Overview

Edvance360's new V8 is a completely new software written to upgrade and enhance its previous versions. There are no additional fees associated with V8. Once a client is interested in viewing V8 for themselves, they may submit an Edvance360 Help Desk ticket requesting a V8 Sandbox site.

The Version 8 Sandbox

Once a Sandbox V8 site has been created, your key Admin user will be given access to examine it closely making sure everything is showing and functioning properly: all courses, course content, repository files and folders, users, etc. It is advised to review all the new Admin features and settings to get comfortable with the new version. While playing in your V8 sandbox, your V7 site is the active site where your users will continue to log in and work. The Admin user may make setting changes, etc., however, these will NOT appear on your migrated V8 site when you go live. Your Sandbox V8 site is for reviewing and testing…it will NEVER go "LIVE". Any work done in the Sandbox V8 site will be wiped out at the time of final migration. You do not want students working in courses or instructors building content in Sandbox V8 until after the final migration is complete.

When ready to migrate to a "LIVE" V8 site, submit an Edvance360 Help Desk ticket in your V7 site requesting a day and time to set up your brand new V8 site which will then be active and "LIVE" for all users. The migration day/time request must first be approved by the Edvance360 Help Desk to officially take place.

- Recommendation: It is recommended you select a day/time when your users would be least active on the V7 site for the E360 IT Department to disable your V7 site and migrate it to the new V8 site.
- Recommendation: It is recommended as soon as the V8 site is active, your designated Admin user immediately go to the V8 site to make the changes/edits needed for the site and users. (Recommended changes/edits are listed below.)
- Recommendation: It is recommended you save a copy of your V7 Terms of Service to be pasted into the new "LIVE" V8 site in Admin>Conf&Settings>ApplicationSettings>TermsOfService

When your new V8 site is "LIVE", your users may continue using the current V7 URL address to login, which will be automatically redirected to your new site (such as clientname.edvance360.com), and they may continue using their current username and password.

Considerations

Here is a helpful list of considerations and possible edits needed to be made as soon as the "LIVE" V8 site is active.

General Considerations

- **Site Logo**: The site logo may be edited by going to Admin>Config&Settings>Application Settings>Logo
- **Site Color Theme**: The site color theme may be edited by going to Admin>Config&Settings>Application Settings>Theme
- **Language Pack**: Various words may need to be edited by going to Admin>ApplicationManagement>LangaugePackEditor
- **Email Settings**: Welcome Email settings will need to be updated which are located in Admin>ApplicationSettings>EmailSettings
- **Time Zone**: Double check to make sure the Time Zone is set properly by going to Admin>Config&Settings>ApplicationSettings>TimeZone
- **Terms of Service**: Review and edit by going to Admin>Config&Settings>General Settings>Terms of Service
- **Banners**: Add any number of rotating Banners to the Home Dashboard by going to Admin>ApplicationManagement>Banners
- **User Roles**: V8 allows Admin users extreme granular filters for each user type deciding which tools, features, and functions they desire each user type accessibility when logging in. Go to Admin>UserManagement>UserRole
    - Select the "Pencil" icon on the right to EDIT the name of each user type and assign widgets which would appear on user's Dashboard
    - Select the "Gear" icon on the right to MANAGE what each use type may have access to.
- **Website Hyperlink**: To add a website hyperlink to the site logo, go to Admin>Config&Settings>ApplicationSettings>WebsiteHyperlink
- **HomePage Link**: To add important quick links for users on the left-hand panel of the Home Dashboard, go to Admin>HomePageLinks

User Type Considerations

Go to Admin>UserManagement>UserRoles and select the Manage gear icon to the right of the user role to manage what should be turned on or off for the each user type. Here are examples:

- **Turn off course building Lite Wizard/Course Wizard for Instructors?**
  Admin>UserManagement>UserRoles>Select Manage Gear Icon to the right of the user role>Application>Deselect Lite Wizard and Course Wizard boxes

- **Turn off Content Cloning for Instructors?**
Admin>UserManagement>UserRoles>Select Manage Gear Icon to the right of the user role>Application>Deselect Cloning boxes
- **Turn off Certificates for Instructors and/or Learners?**
Admin>UserManagement>UserRoles>Select Manage Gear Icon to the right of the user role>Application>Deselect Index>Certificates
- **Turn off Eportfolio for Instructors and/or Leaners?**
Admin>UserManagement>UserRoles>Select Manage Gear Icon to the right of the user role>Application>Deselect Eportfolio boxes
- **Turn off Network for Instructors and/or Learners (this was called "Contacts" in V7)?**
Admin>UserManagement>UserRoles>Select Manage Gear Icon to the right of the user role>Network>Deselect Network boxes
- **Turn off ALL COURSES for Instructors and/or Learners?**
Admin>UserManagement>UserRoles>Select Manage Gear Icon to the right of the user role>Trainings/Courses>Trainings/Courses>Deselect All Training/Courses (Some sites will say "Trainings" and others will say "Courses")
- **Turn off ALL COMMUNITIES for Instructors and/or Learners?**
Admin>UserManagement>UserRoles>Select Manage Gear Icon to the right of the user role>Communities>Communities>Deselect All Communities
- **Turn off Reports for submitting Off-Line Reports for Learners?**
Admin>UserManagement>UserRoles>Select Manage Gear Icon to the right of the user role>Application>Deselect Off-Line Reporting
- **Turn on/off Course Building Mode while editing a course?**
When Course Designers are making changes to a course, the Learners of the course will begin seeing notifications appear in their "BELL" icon in the top right small box of Home Dashboard. If Couse Designers would like to work in the "Course Building" mode, this will stop notifications from appearing for the Learner. To work in the Course Building mode in a course, select a Course>Settings>Other>Course Building Mode>ON. As a reminder, when completed making changes, go back and turn the Course Building mode OFF.