Investit Academy Learning Management System

RE/MAX COMMERCIAL

Staff Operating Guide
RE/MAX Offices
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Overview and Objectives

The Investit Academy LMS enables RE/MAX Offices to implement an online commercial training and certification program using the Investit Academy online "Raising Your Commercial IQ" video series as the foundation on which to build an outstanding commercial training program.

The overall function of the LMS is to provide online education, practice quizzes, proctored exams, and the recording of student grades and the issuance of a certificate upon completing the course requirements.

The objectives of this operating manual are to explain how to effectively manage and use and the LMS and answer typical questions that may come from RE/MAX realtors.

Videos

Videos and manuals on how to use the Investit Academy Learning Management System (LMS) is available at http://guides.investitacademylms.com/

Platform

The Investit Academy LMS uses Moodle which is the world`s leading open source learning management system with over 51,000 sites and 36 million users. Moodle is used by major universities, colleges and corporations to deliver online education and training.

Operations

The LMS resides on the Investit server and is maintained by Investit Staff.

Access to the LMS

To gain access to the LMS go to https://public.investitacademylms.com/moodle/login/index.php and enter your User Name and Password.

DEVICES

The Investit LMS can be viewed on all the popular devises such as a PC, Laptops, Android tablets, Macs, IPads, iPhone, Android Smart phone.

In the case of the iPhone an app must be downloaded. This can be done from the main LMS screen.

Attention Android, iPhones and iPad viewers
How to play the Investit Flash Card on your mobile device

101. How to Analyze and Value Income Properties

Video (3-1/4 Hours)   Manual

Micro Videos   101. Flash Card Packs

Practice Quiz

Roles and Privileges

The LMS offers the following roles. Each role has a set of privileges or actions they can take.

The roles are:
1. Candidates. Members of the RE/MAX office taking the educational courses
2. Manager(s) are assigned to the RE/Max office
3. Proctor(s) Primarily administers exams
4. Applicants. Someone wishing to join a RE/MAX office and take the competency test

Each role has different actions that they can take which are described below.

Each role has associated privileges as follows:

Actions	Manager	Proctor	Candidate	Applicant
Add a Manager	Yes	No		
Add a Proctor	Yes	Yes		
Add a Candidate	Yes	Yes		
Add an Applicant	Yes	Yes		
Set up exams	Yes	Yes		
Review exam grades	Yes	No	Yes	No

Notes.

Proctor. Is likely a RE/Max Office administrator. The major role of the proctor is setting up and administering exams and the competency test. A proctor cannot review the candidate's exam results.
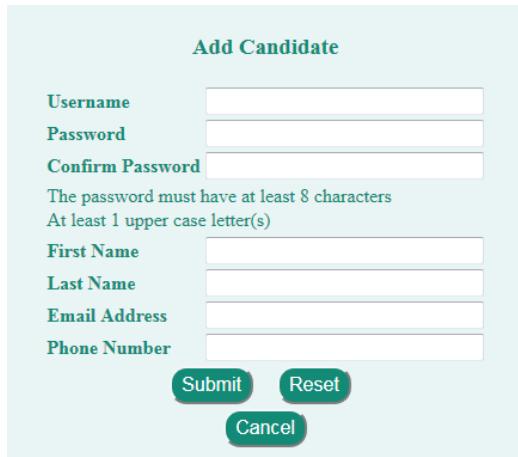
Applicant. Is someone applying to join a RE/MAX office or wanting to transition for residential to commercial sales. The competency test is used to assess their understanding of the basic terms and calculations used in commercial real estate.

The applicant has no privileges. The competency test is set up by the manager or proctor. The applicant does not receive the test results which are only available to the manager.
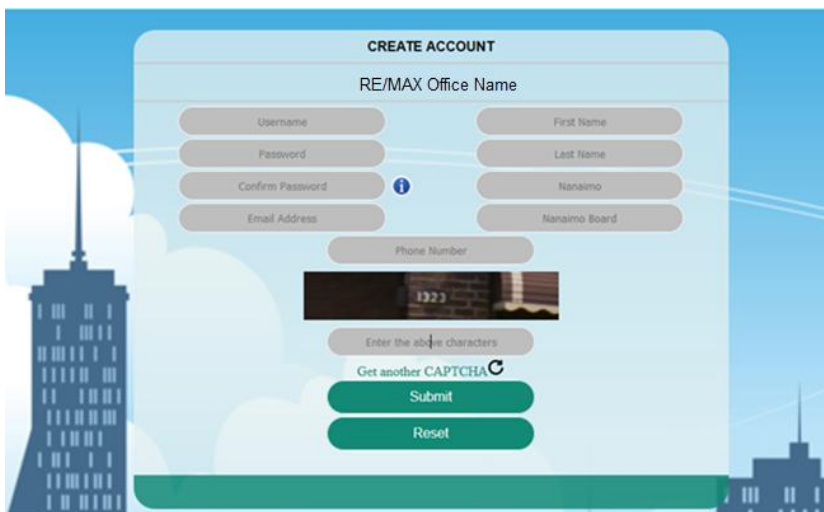
Enrollment

There are two ways that a RE/MAX office can enroll candidates (realtors).

1. The manager or proctor manually sets up the candidate
   Once the "Add Candidate" form is complete the candidate receives an email with their "User Name" and "Password" and the link to the login page for their office

2. The candidate or realtors belonging to the RE/Max Office can self-enroll. The RE/MAX office provides a link to the candidate to the Self Enrollment page for the office.

After self-enrolling the candidate can view the videos, print the manuals, use the flash card packs, take the practice exercises and the mastery challenge tests and view their grades and progress.
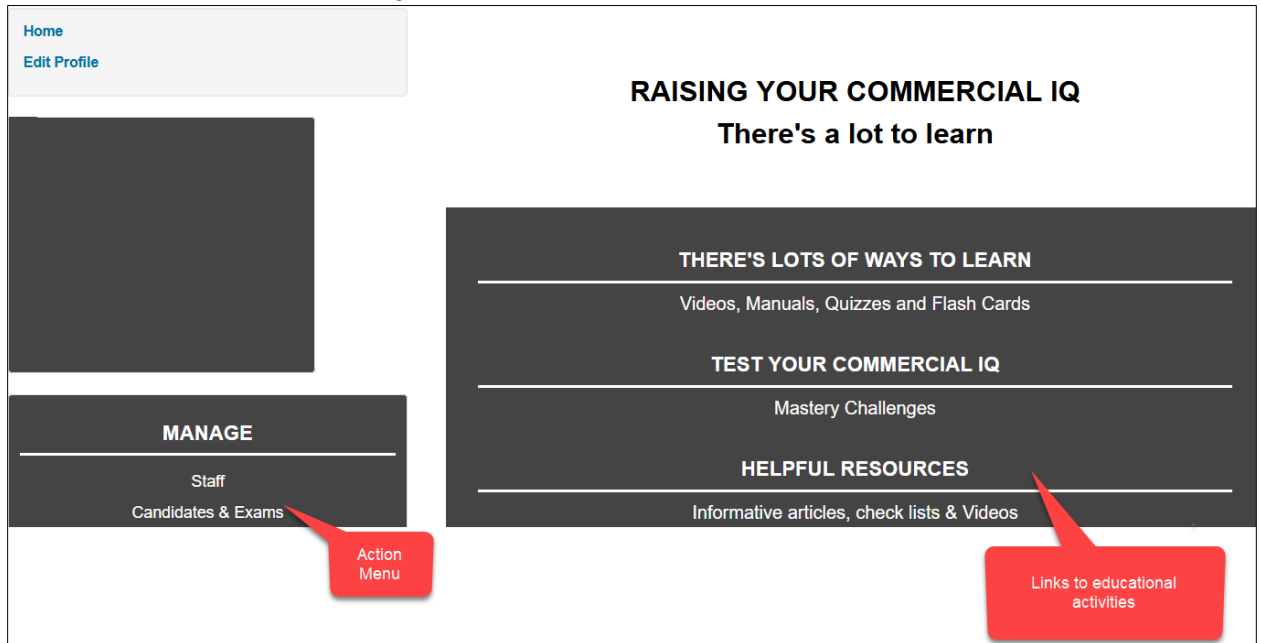
Navigation

The LMS is very easy to navigate and use.

Home Page

There are two aspects to the Home page
1. Links to the various learning activities such as viewing a course video
2. Action menu for carrying out activities such as viewing a candidate's grade

Home Page

RAISING YOUR COMMERCIAL IQ
There's a lot to learn

Home
Edit Profile

THERE'S LOTS OF WAYS TO LEARN

Videos, Manuals, Quizzes and Flash Cards

TEST YOUR COMMERCIAL IQ

Mastery Challenges

MANAGE

Staff

HELPFUL RESOURCES

Candidates & Exams

Informative articles, check lists & Videos

Action
Menu

Links to educational
activities

Educational Activities

The educational activities for each course include:

1. Course video and matching manual which can be printed
2. Micro Videos. Short videos of specific topics
3. Practice Quiz. Enables a candidate to test their knowledge and prepare for a course exam

To learn more about the educational activities use the LMS to explore the various learning activities.

Videos, Manuals, Quizzes and Investit Flash Card Packs

Raising Your Commercial IQ Video Series

Please use the following links to access the videos, workshop manuals, practice quizzes, and Investit FlashCard Sets for the Raising Your Commercial IQ video series. We recommend that you print out the manuals before watching the corresponding video and view the video before taking the practice quizzes.

Attention Android, iPhones and iPad viewers
How to play the Investit Flash Card on your mobile device

101. How to Analyze and Value Income Properties

Video (3-1/4 Hours)   Manual

Micro Videos   101. Flash Card Packs

Practice Quiz

102. Real Estate Investment Analysis

Video (3-1/4 Hours)   Manual

Micro Videos   102.Flash Card Packs

Practice Quiz

103. Development Analysis and Valuing Land

Video (4-3/4 Hours)   Manual

Micro Videos   103.Flash Card Packs

Practice Quiz

201. Applied Real Estate Investment and Lease Analysis

Video (4-1/2 Hours)   Manual

Micro Videos   201.Flash Card Packs

Practice Quiz

202. Creating and Profiting from Joint Ventures

Video (3-1/4 Hours)   Manual

Micro Videos   202.Flash Card Packs

Practice Quiz

203. Office, Industrial and Retail Leasing

Video (3 Hours)   Manual

Micro Videos   203.Flash Card Packs

Practice Quiz

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The Commercial Mastery Challenge allows the candidate to test their knowledge of commercial real estate in specific areas.

The grade is recorded. They can use the Mastery challenge to check their progress.

Commercial Mastery Challenge

Use the following commercial mastery tests to determine how well you understand the basic terms and calculations used in commercial real estate.

How well did I do?

You can check your test grade. This will help you decide on what areas you need to work on and then take the test again and check out your improvements.

Who will see my grades? Only you

Mastery Test focus

The commercial mastery tests focus on the common basic terms and calculations used in commercial real estate. The mastery tests are not based on the "Raising Your Commercial IQ" video series

Mastery tests

Income Properties

Cap Rates & Income Multipliers

Financing

Risk Analysis

Internal Rate of Return (IRR) & Net Present Value (NPV)

Investment Analysis. The Basics

Real Estate Investment Analysis

Leasing

Tax

Developments

Valuing land. Intro

Factors influencing land values

Impact of design & zoning regulations on land values

Offers & Options

Development analysis

Resources

The LMS offers a variety of resources including videos on unique topics such as Buy versus Lease, educational articles and check lists.

Resources

Articles

- Formulas and Sample Calculations
- Valuation of Income Properties
- About Cap Rates!
- 5 points investors should consider when buying a property. Altus. Excellent article.

Checklists & References

- Apartment Buildings
- Industrial Leasing
- Leasing Terms and Definitions
- Development Check List

Videos

- Buy vs Lease Analysis (14 minutes)
- Hold vs Sell Analysis (15 minutes)
- Lease Analysis Land Lord (20 minutes)
- Lease Analysis Tenant (20 minutes)
- Development Analysis Quick Proforma (18 minutes)
- Development Analysis Cash Flow Projection (13 minutes)
- Replacement Reserve Planning (24 minutes)
- Real Estate Investing Financial Leverage (14 minutes)

Courses and Certification

The LMS enables the "RE/MAX Certificate in Commercial Real Estate to be issued on passing the exams for the three core courses and one elective course.

Core courses

101. How to Analyze and Value Income Properties (3-1/4 hours)
102. Real Estate Investment Analysis (3-1/4)
103. Development Analysis and Valuing Land (4-1/2 hours)

Elective courses

201. Applied Real Estate and Lease Analysis
202. Creating & Profiting from Joint Ventures
203. Office, Industrial and Retail Leasing (3 hours)

The passing grade for each course is 75%.

Education and Training Activities

The education and training activities consist of:

1. Videos and workshop manuals
2. Practice quizzes
3. Mastery challenges
4. Investit Flash Card Packs
5. Exams
6. Competency assessment tests
7. Resources such as check lists and articles
8. A RE/MAX office can add additional educational content such as videos, articles, etc. To do this they need to contact Investit to do the initial set up for the additional content feature

Exams

To pass a course the candidate takes an exam using an office computer that is setup and supervised by the office "Proctor" or by the "Manager". Multiple candidates can take the exam at the same time but will receive different questions. For each candidate questions are drawn randomly from an exam bank of over 100 questions for each course.

The exam result can be viewed by the candidate and by management in the grade book but not by the Proctor. The results are emailed to the candidate and manager.

Exam rules

1) Time allowed: 3 hours
2) Basic calculator is required
3) Closed book supervised exam
4) Passing grade: 75%
5) Attempts. The Candidate or Applicant is only allowed one attempt at a time. If they exit before completing or complete but fail the Candidate or Applicant must request a new proctored exam
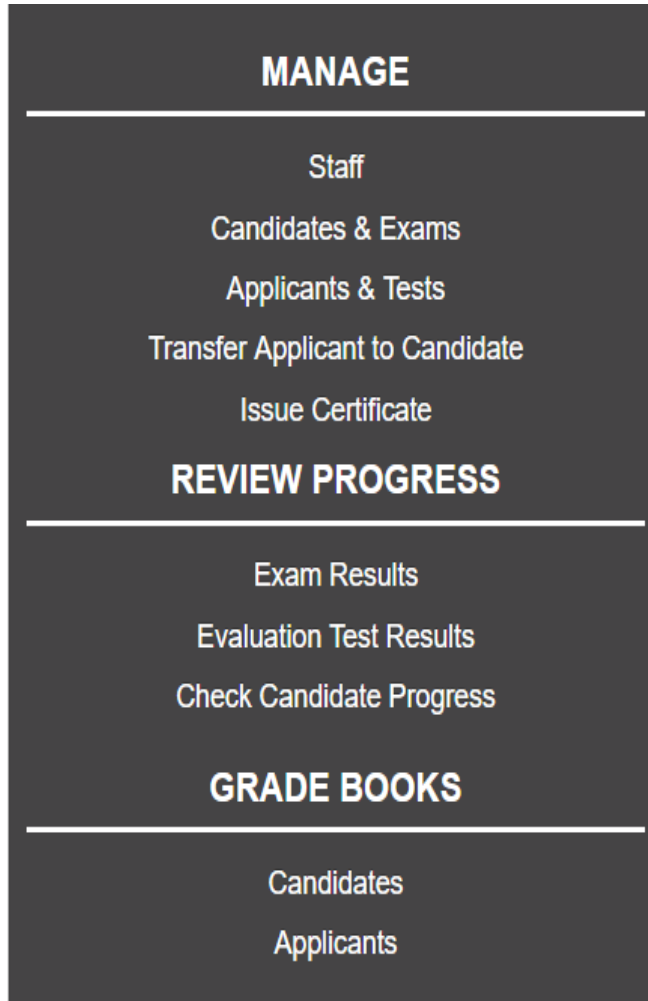
Exam Generation

The Moodle LMS offers a number of features which allows a number of candidates or applicants to be tested together. Each candidate is presented with a different set of questions presented in a randomly generated order making it impossible to share answers and makes it difficult to memorize the answers ahead of time.

1) A specified number of questions are randomly selected and presented in a random order from a large Quiz Bank. Certain questions have been selected so that they always appear on an exam. The remainder are chosen randomly.

2) Questions that involve calculations such as ``Calculate the Cap Rate`` are generated each time using a different set of numbers. This means that candidates may see the same question such as ``Calculate the Cap Rate`` but the numbers being provided and the answer will be different for each candidate.

Candidates sitting side by side will not see the same questions because the questions for each candidate are being drawn randomly from the exam bank and presentation randomly.

Manager's "Action Menu"

Using the "Action Menu" a manager can directly enroll candidates, add proctors and managers, set up exams, review grades and progress by clicking on the appropriate button on the Action Menu.

MANAGE

Staff

Candidates & Exams

Applicants & Tests

Transfer Applicant to Candidate

Issue Certificate

REVIEW PROGRESS

Exam Results

Evaluation Test Results

Check Candidate Progress

GRADE BOOKS

Candidates

Applicants

The Manager using the "Action Menu" can:
1. Add additional Managers
2. Add Proctors
3. Add Candidates and Applicants
4. Transfer an Applicant to a Candidate
5. Set up exams
6. Review grades for all candidates and applicants
7. Re-issue certificates
8. Track progress
9. Re-send the email containing user's login information

Add Staff

A manager can add additional Managers and Proctors and display the staff list.

MANAGEMENT of STAFF

Show All Staff   Add Manager   Add Proctor

Add Manager

Username

Password

Confirm Password

The password must have at least 8 characters
At least 1 upper case letter(s)
At least 1 non-alphanumeric character(s)
Only symbols - _ ? < > *) (& ^ % $ # @ ! are allowed

First Name

Last Name

Email Address

Phone Number

Organization   RE/Max of Western Canada

Office   RE/Max Office Name

Submit   Reset

Cancel

Once the form is complete the manager or proctor receives an email with their "User Name" and "Password" and the link to the login page for their office

Candidates & Exams

Allows the Manager or the Proctor to:

a) Create a new Candidate or find a Candidate.
b) Set up an exam.
c) Set a Candidate up with the Competency Test.

Setting up an Exam

Login as a manager or as a Proctor and select "Candidates & Exams".

From the Candidates and Exams screen, find the appropriate candidate by searching for them specifically or by clicking Show all Candidates and picking the Candidate from the list. Click on the Candidates First or Last name.

Click on Administer Exam from the Candidate menu.

Select the appropriate exam from the drop-down menu and click Submit.

The chosen exam with be displayed

Starting an Exam

There are two ways for a candidate to start an exam.

1) The candidate can login to the Investit LMS using their Username and Password
2) The Proctor or Manager can click on Start the Exam in Candidate menu next to the appropriate Exam.

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Setting up the Competency Test

Login as a manager or as a Proctor and select "Candidates & Exams".

From the Candidates and Exams screen, find the appropriate candidate by searching for them specifically or by clicking Show all Candidates and picking the Candidate from the list. Click on the Candidates First or Last name.

Click on Competency Test from the Candidate menu.

Select the test from the drop-down menu and click Submit.

The chosen test with be displayed

Starting a Test

There are two ways for a candidate to start a competency test.

1) The candidate can login to the Investit LMS using their Username and Password
2) The Proctor or Manager can click on Start the Test in Candidate menu next to the appropriate Exam.

.

Exam rules

1) Time allowed: 3 hours
2) Closed book supervised exam
3) Passing grade: 75%
4) Basic calculator required
5) Attempts. The Candidate or Applicant is only allowed one attempt at a time. If they exit before completing or complete but fail the exam the Candidate or Applicant has to request a new exam

Starting the exam. CAUTION

The candidate's exam should not bet set up until the candidate has arrived at the location where the exams going to be conducted.

The reason. Once the exam is set up the candidate can login and access the exam.

Setting up an exam up ahead of time would enable the candidate to take an unsupervised exam and experience the exam questions. Not a good idea

Set the exam up when the candidate arrives in your office to take the exam

Proctoring a group
 If your proctoring an exam for candidates set the exam up for each candidate about 15 minutes ahead of time. When the exam was ready to start have each candidate login and click on the exam link to start the exam

If the candidate doesn't turn up it is very important to delete the exam to prevent the candidate from previewing or trying to exam later. The exam will automatically delete 3 hours after the start time.

Deleting an exam
To delete an exam, find the candidate, click on the first or last name, which will display the exam screen, click on the delete button

The exam has now been removed from the candidate's home page and no longer available to the candidate.
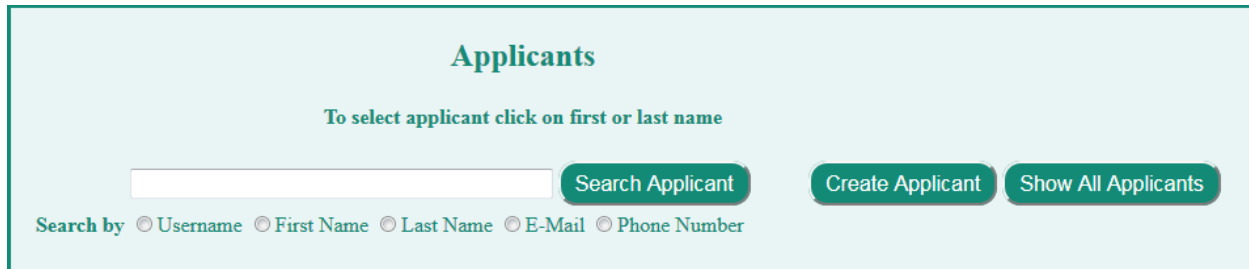
Applicants & Tests

An applicant applying for membership to join a RE/MAX Office and is required to take the "Competency Test" to test their knowledge of the basic terms and calculations used in commercial real estate.

An applicant cannot self-register. The competency test is set up by the "Proctor" or the "Manager".

Setting up an Applicant
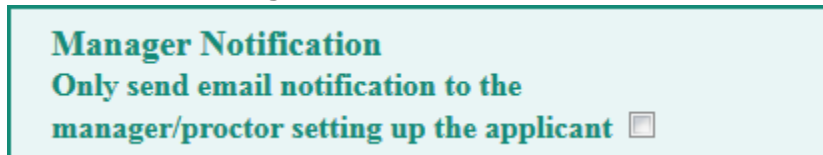
The first step is to create the Applicant or if the applicant has been created to search for the applicant. **Note:** Applicants cannot self-enroll

Applicants

To select applicant click on first or last name

Search Applicant   Create Applicant   Show All Applicants

Search by ○ Username ○ First Name ○ Last Name ○ E-Mail ○ Phone Number

The Create Applicant form is a standard form with a couple of checkboxes at the bottom.
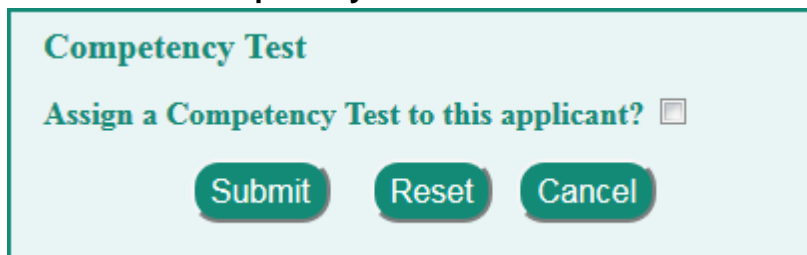
Checkbox 1: Manager Notifications

Manager Notification
Only send email notification to the
manager/proctor setting up the applicant ☐

The first checkbox determines which managers/proctors will receive notification that a new Applicant has been created in the LMS. If selected only the manager or proctor setting up the Applicant will get an email notification. If it is not selected all managers and proctors will receive notification.

Checkbox 2: Competency Test

Competency Test

Assign a Competency Test to this applicant? ☐

Submit   Reset   Cancel

Select the second checkbox if you wish to setup the Applicant with a Competency Test immediately. The next section will explain how to setup a competency test at a later date if this checkbox is left unchecked.

When you select the checkbox a dropdown menu and another checkbox will appear.
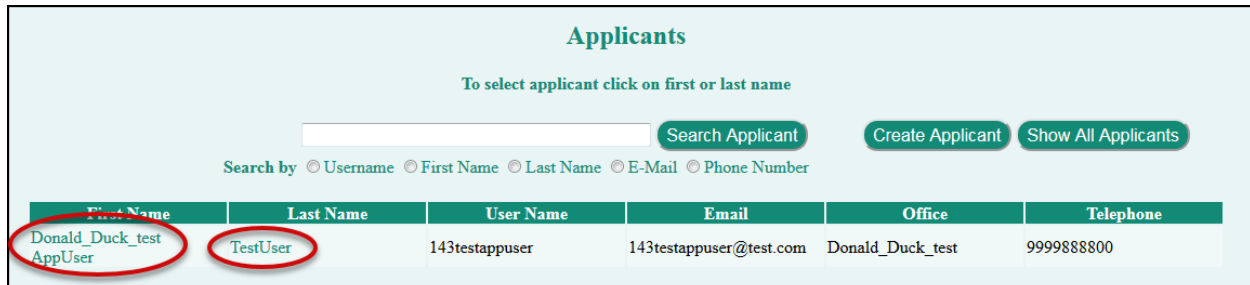
Competency Test

Assign a Competency Test to this applicant? ☑

Select Test   Evaluation Test. Commercial Basics   ▼

Send the Applicant an email with the login information
Note: If the test will be proctored you should leave this   ☑
unchecked.

Choose the Competency Test you wish to enroll the Applicant in from the dropdown menu. The textbox determines whether the Applicant will receive an email with their login information.

Note: If you want the test to be supervised, we recommend that you leave this unchecked because the Applicant will be able to write the test whenever and wherever they wish.

Setting up an Applicant Test

From the Applicants and Tests screen, find the appropriate applicant by searching for them specifically by "First Name" or 'Last Name" or by clicking "Show all Applicants" and picking the applicant from the list. Click on the Applicant's First or Last name.

Click on Administer Test from the Applicant Menu

Select the appropriate test from the drop-down menu and click on Submit

There are two ways that the Applicant can access the test.

1. To begin the Test, click on Start the Test. The Proctor/Manager will then be automatically logged out of the LMS and the Applicant will be logged in in their place.

Clicking on the Start the Test button will log you out of your account and login to the Applicant's account where they can proceed to write the test by click on the Attempt exam now button.

2. If you wish the applicant to write the test from a different computer then you can click on the Email Login Information button to provide the Applicant with instructions to login into their account.

Applicant

Donald_Duck_test AppUser TestUser

You have successfully assigned "Evaluation Test. Commercial Basics" to "Donald_Duck_test AppUser TestUser"

Administer Test　Edit Profile　Change to Candidate　Email Login Information

Donald_Duck_test AppUser TestUser's tests

Test Name		
Evaluation Test. Commercial Basics	Start the Test	Delete

Back

Upon logging in to their account, the Applicant will see a link for the test in the center of the screen.

Evaluation Test. Commercial Basics

Upon completion of the competence test the:

1. manager receives an email with the candidate's grade
2. applicant receives an email acknowledging the test but does not receive the grade
3. grade is recorded in the Applicant's grade book and can be viewed later by the manager but not by the applicant

Transfer Applicant to Candidate

To transfer and Applicant to a Candidate click on the:

1) "Transfer Applicant" button
2) Select the Applicant
3) Click on the Transfer button

Transfer Applicant to Candidate

--Select Applicant-- ▼ Transfer Cancel
--Select Applicant--
Jay Williams

Grades

Exam Results

Allows you to view the candidate's course exam results.

Start by selecting the course and select the candidate

Select the report. There are three exam reports:

> Summary Grade Report. Show the grades by "Question Types". The best report.
> Grade Report. Shows the overall grade
> Detailed Report. Shows the question grade

Click on "Show Report"

Exam: 101. How to Analyze and Value Income Properties

Download table data as [Excel spreadsheet ▾] [Download]

Candidate		Summary Grade Report	
Donald Duck	82%	Date Attempted: December 21, 2017	Time Taken: 2 hours 51 mins
Analysis (11)	83%	Cap Rates (15)	84%
Finance (6)	87%	Investment Analysis (8)	100%
Leasing (9)	65%	Real estate development (4)	83%
Engineering (6)	91%		

The "Summary Grade Report" shows the course exam results broken down by question types.

This allows the manager or the candidate to decide if additional education is needed and in what area. In this example, the candidate didn't achieve a grade of 75% and need to take the course exam again. The areas needing more study are Leasing 35% and Engineering 54%. The candidate needs to review these areas in the Course 101 video, manual and micro videos and take the 101 Practice quiz before re-taking the 101 Course exam.

Candidate Grade Book

Allows you to view the candidate's grade results.

Allows a Manager to view the Candidate's grades by:
1) Clicking on "Show All Candidates" and then selecting the Candidate or by:
2) Doing a search for the candidate using "Username", "First Name", "Last Name" or "E-mail address".

Candidate's Grade Book

To view the Grade Book click on Candidate's first or last name

[text field]   Search Candidate   Show All Candidates

Search by ○ Username ○ First Name ○ Last Name ○ E-Mail

Search for a specific Candidate or click "Show All Candidates" to find the candidate from all Candidates belonging to your office. Click on the First or Last Name of the candidate to display the exam grades.

The Candidates grades for each course will appear in descending order by course and date.

Candidate's Exam Grade Book

Donald Duck

Course	Grade	Date
Exam: 101. How to Analyze and Value Income Properties	82%	May 16, 2018 12:19:28 PM
Exam: 102. Real Estate Investment Analysis	88%	May 16, 2018 12:24:20 PM
Exam: 102. Real Estate Investment Analysis	62%	May 16, 2018 12:10:15 PM

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Applicant Grade Book

The Applicant Grade book is a little different than the Candidate Grade book. It contains all Competency Test results for both Candidates and Applicants.

Allows a Manager to view the Competency Test grades by:
1) Clicking on "Show All Applicants" and then selecting the Candidate or Applicant or by:
2) Doing a search for the Candidate or Applicant using "Username", "First Name", "Last Name" or "E-mail address".

Applicant's Grade Book

To view the Grade Book click on Applicant's first or last name

[   ] (Search Applicant)   (Show All Applicants)

Search by ○ Username ○ First Name ○ Last Name ○ E-Mail

Search for a specific Candidate or Applicant or click "Show All Applicants". Click on the First or Last Name of the Candidate or Applicant to display the exam grades.

In this case we are displaying Candidate Bob Smith's competency test grades displayed in descending order by course and date.

Applicants's Grade Book

Bob Smith

Test	Grade	Date
Evaluation Test. Commercial Basics	85%	Aug 31, 2017

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Evaluation Test Results

Allows the Manager to view the applicant's results on the "Evaluation Test".

Note: The only person who can see the competency grade is the manager

1. Click on "Evaluation Test Results" on the "Action Menu"
    There are three Evaluation Test reports
        Summary Grade Report. Show the grades by "Question Types". The best report
        Grade Report. Shows the overall grade
        Detailed Report. Shows the question grade

2) Select the Applicant. Example "Donald Duck"
3) Click "Show Report"

The "Summary Grade Report" shows the evaluation test results broken down by question types. This allows a manager or mentor to decide if the applicant has a good understanding of the basics of commercial real estate and whether the applicant needs additional training.

Check Candidate Progress

Check Candidate Progress allows you to check a "Candidate's" exam results and review their progress.

1. Click on the "Check Candidate Progress" on the "Action Menu"

2. Find the candidate by searching by "First" or "Last Name" or use "Show All Candidates" and select the candidate from the candidate list by clicking on the "First" or "Last Name"

Track User Progress

Search by ○ Username ○ First Name ○ Last Name ○ Phone Number ○ E-Mail

First Name	Last Name	User Name	Telephone	Email	
Donald	Duck	114testcanuser	9999888800	114testcanuser@test.com	Show Attempts

3. Click on "Show Attempts" for the course

Donald Duck Exam Attempts

Select exam to view progress

Exam	Attempts	
Exam: 101. How to Analyze and Value Income Properties	1	Show Attempts
Exam: 102. Real Estate Investment Analysis	2	Show Attempts
Evaluation Test. Commercial Basics	1	Show Attempts

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4. Exam results and history is displayed for the selected course

Donald Duck Exam Attempts

Select exam to view progress

Exam	Attempts	
Exam: 101. How to Analyze and Value Income Properties	1	Show Attempts

Attempt	Marks Secured	Grade	Attempt Date	Status
1	80/97	82%	12-07-2017	Passed

Close

Exam	Attempts	
Exam: 102. Real Estate Investment Analysis	2	Show Attempts
Evaluation Test. Commercial Basics	1	Show Attempts

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RE/MAX Certificate in Commercial Real Estate

When a candidate passes all the courses required for the Certificate in Commercial Real Estate the Manager(s) are notified by email with copies of several different Certificate designs attached.

The "Candidate" receives an email notifying them that they have passed all the required courses

The organization can decide on the best way to present the certificate and recognize the candidate's accomplishment.

The certificate could be presented by the Manager at a weekly meeting or at an event such as a regional conference or received from the president. The accomplishment can be reported in newsletters, email blasts etc.

Certificate design options

The "Certificate Completion" email sent to the Manager(s) contains several different certificate designs and sizes allowing you to choose the best size and layout for your organization.

1) Portrait 8.5 inches wide x 11 inches high. No border
2) Portrait 8.5 inches wide x 11 inches high. With border
3) Small 8-1/2 wide x 5.5 inches wide. No border
4) Small 8-1/2 wide x 5.5 inches wide. With border

> **TIP.** Staples Office Supplies offers a number of attractive and professional blank certificates that you can use.

Sample certificate

Investit Academy

Certificate of Completion

Commercial Real Estate

Peter Williams

This is to certify that Peter Williams has completed
18 educational hours of commercial education and passed the five exams
for the Investit Academy 'Raising Your Commercial IQ' online education

RE/MAX of Western Canada

June 20, 2017
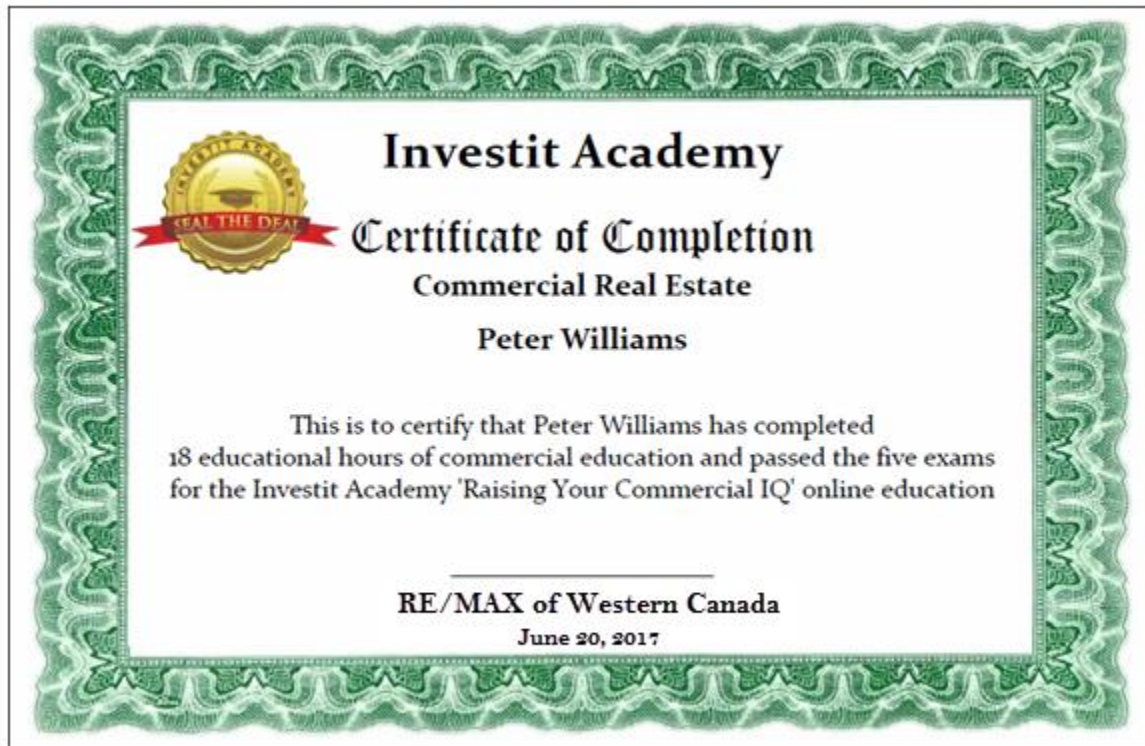
Issue Certificate

Re-issuing the certificate

As a manager, you can re-send the email containing the certificate to yourself using "Issue Certificate"

1. Click on "issue Certificate" on the Action Menu

2. Find the candidate by searching by "First" or "Last Name" or use "Show All Candidates" and select the candidate from the candidate list by clicking on the "First" or "Last Name"

Issue Certificate

Please enter a Candidate name to view their Certificate progress

Search by ○ First Name ○ Last Name

[Search Candidate]   [Show All Candidates]

3. Click on "Email Certificate. This will send the email with the certificates attached to you

| Peter | Williams | Exam: 101. How to Analyze and Value Income Properties
Exam: 102. Real Estate Investment Analysis
Exam: 103. Development Analysis and Valuing Land | Exam: 201. Applied Real Estate Investment and Lease Analysis | Email Certificate |

Proctors

The actions available to the Proctor are limited to:
1. Adding or removing candidates
2. Setting up exams for a Candidate or an Applicant and supervising the exam
3. Adding additional Proctors
4. Transferring an Applicant to a Candidate

Because of privacy concerns the Proctor does not have access to the candidate's or applicant's exam grades.

The Proctor is most likely the office administrator or assistant to the manager and can add additional proctors and enroll candidates.

Action menu for the Proctor

MANAGE

Staff

Candidates & Exams

Applicants & Tests

Transfer Applicant to Candidate
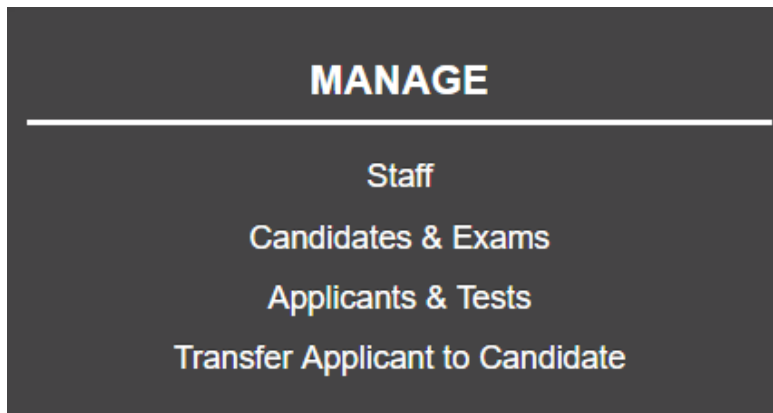
Password Recovery

There are two ways to recover or change a password.

1. During the login process

If the user has forgotten their password they can use "Forgotten password?" to recover their password.
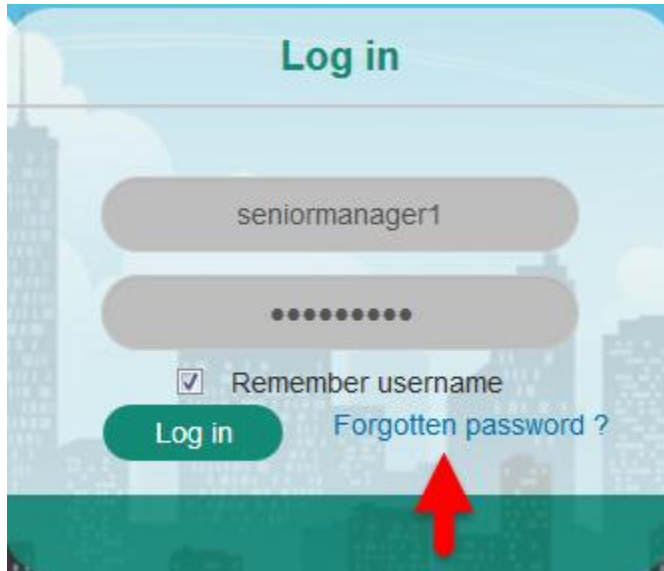
Using this process, the user can recover or reset the password and receives an email with the login information.

2. Manually recovering of a password

Our experience in dealing with passwords is that a user may call you directly to re-send their login information because they have forgotten their login information.

To do this:

1. Enter the LMS as a "Manager" or "Proctor" or a "Senior Manager"
2. On the action menu select either "Add Staff" or "Candidates & "Exams"

Staff	To locate a staff member
Candidates & Exams	To locate a candidate

3. Find the "Staff member" or "Candidate" by searching using 'Search' or use "Show All Candidates" and select the candidate from the candidate list by clicking on the "First" or "Last Name"

Candidates

To administer an exam or change the Candidate's profile
Click on first or last name

[_____] [Search Candidate]   [Create Candidate] [Show All Candidates]

Search by ○ Username ○ First Name ○ Last Name ○ Phone Number ○ E-Mail

4. Click on "Email Login Information" which emails the "User Name" and "Password"

Candidate

Donald Duck

(Competency Test) (Administer Exam) (Edit Profile) (Email Login Information)
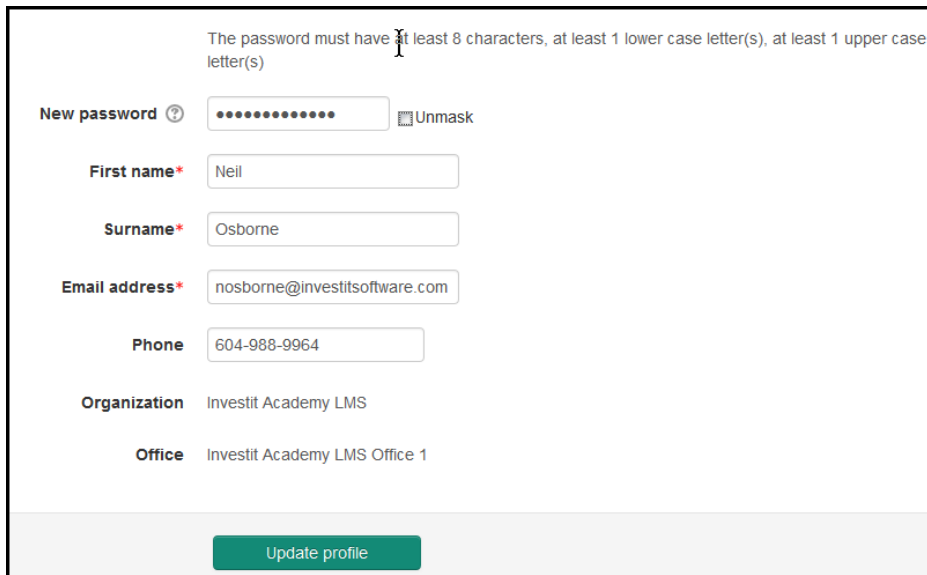
Change profile

A user can change their profile by logging in and the clicking on "Edit Profile"
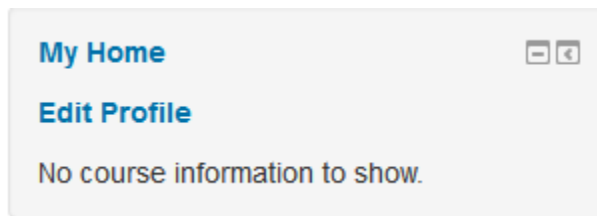
The "User Name" and "Password" can be changed as well as contact information

The user can view their password using the "Unmask" password feature.

Additional Content

To add additional content such as videos, articles, checklists etc. you have to first request that Investit sets up the 'Additional Content' feature for your office which adds course manager privileges.

To modify an additional course for your office or organization you will need to have course manager privileges.

To setup or edit a course you must first select the course from the menu in the upper left corner. You will need to click on the down arrow to left of courses to bring up the list of courses.

Courses are divided into 1 or more Topics and each Topic can have 1 or more resources or content. To manage Topics you will need to Turn editing on from the Course administration menu. The edit settngs applies to the course level settings.
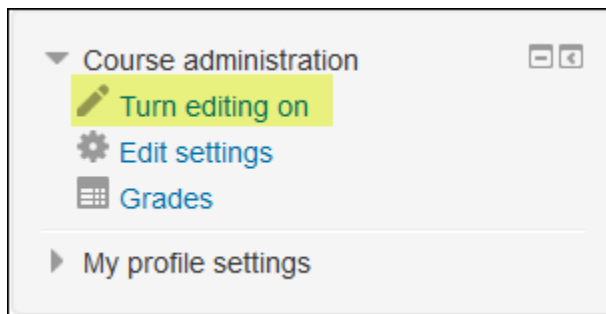
Once editing is enabled the course screen will change to show various editing options. The gear highlighted below the Joint Ventures topic will allow you to change the name of the topic. Add an activity or resource is how you add actual content to a topic.
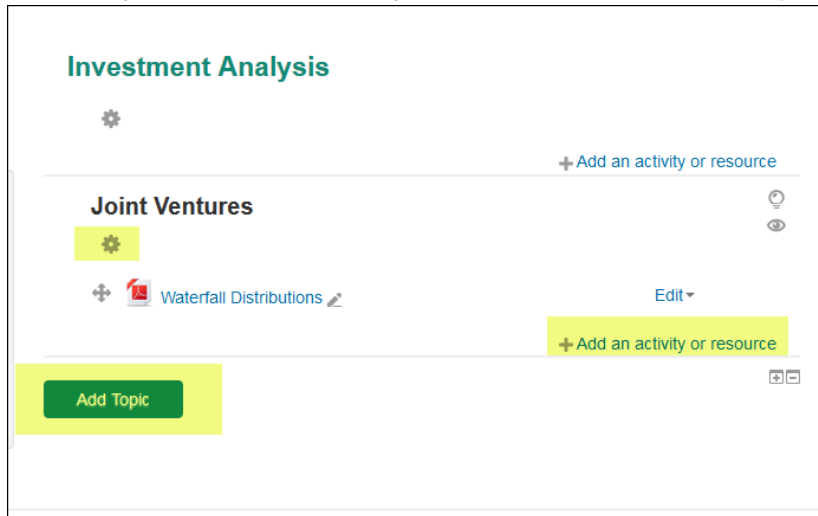
Enrolling Users in Additional Courses

All new users whether they are managers or applicants will need to be enrolled in any additional courses available to your office. To enroll a user in an Additional Course, select the Enroll User option from the Action Menu.
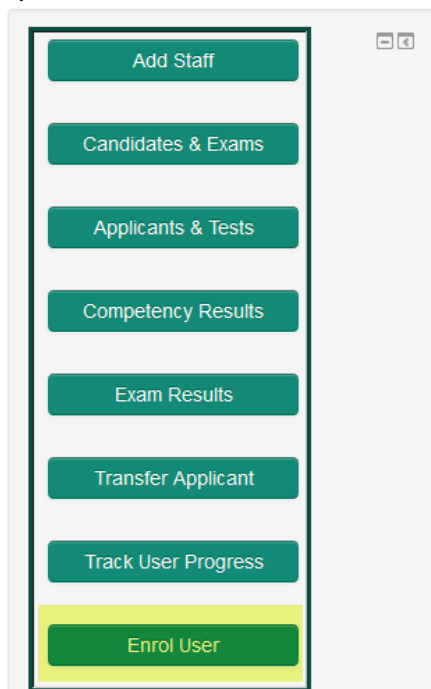
First select the appropriate office from the drop-down box. Then select the appropriate course from the drop-down box. Then click the check boxes next to the appropriate users you wish to enroll in the course or click select all to enroll everyone. Then click on the Enroll All Selected button.

Course Enrollment

Investit Academy LMS

Office : Investit Academy LMS Office 2 ▾

Course : Investment Analysis ▾

[Enroll All Selected] [Unenroll All Selected]

Select All ☐	First Name	Last Name	User Name	Office	Email	Action
☑	Luca	Sbisa	anotherapptest	Investit Academy LMS Office 2	investit@investitsoftware.com	Enroll

Investit Academy LMS Emails

The LMS automatically generates the following emails:

New user is created

There are four types of users of the LMS

1) Manager
2) Proctor
3) Candidate
4) Applicant

When a new user is created the following email is generated and sent to the user.

Note. An applicant will not receive this email because they are not allowed to log themselves into the LMS.

To the "New User"

Subject: Welcome to the Investit Academy LMS

Hello Ron,

Thank you for registering with the Investit Academy LMS. Please use the following information to access the Investit Academy Learning Management System (LMS).

To access the Investit Academy LMS please login from the link on your organizations web site.

Username: Ronsmith
Password: Ronsmith34

Regards,

Investit Academy

To the "Manager". New user has been created

When a new user has been created the manager receives the following email.

Subject: New enrollment. Investit Academy LMS

A new user Ron Smith" from your office has registered with the Investit Academy LMS.

Name:
Email:

Regards,

Investit Academy

Changing profile

1) Manager
2) Proctor
3) Candidate

When a user changes their profile, they receive the following email:

Note: This email only goes to the person who changed their profile

Subject: Welcome to the Investit Academy LMS

Hello Ron,

Your log-in information to the Investit Academy LMS is:

Username: ronsmith
Password: ronSmith51

To access the Investit Academy LMS please login from the link on your organizations web site.

Regards,

Investit Academy

Retrieve login information

Uses the same email as account creation

Subject: Welcome to the Investit Academy LMS

Hello Ron,

Thank you for registering with the Investit Academy LMS. Please use the following information to access the Investit Academy Learning Management System (LMS).

To access the Investit Academy LMS please login from the link on your organizations web site.

Username: ronsmith
Password: ronSmith51

Regards,

Investit Academy

Completion of an Exam

Email to Candidate when passing an exam

Subject: Exam result. Investit Academy

> Hello Ron,
> Congratulations on completion of the "Exam Name" Exam on "Date".
>
> Exam Name: "Exam Name"
> Grade: "83%"
>
> Your grade has been recorded in your "Grade Book"

Email to Candidate when failing an exam

Subject: Exam result. Investit Academy

> Hello Ron,
>
> You have written the "Exam Name" on "Date" and failed to pass the exam grade of "80"%
>
> We recommended that you review the course materials and test yourself using the "Practice Quiz" prior to re-writing the exam.
>
> Exam Name: "Exam Name"
> Grade: "61"%
>
> Your grade has been recorded in your "Grade Book"
>
> Regards,
>
> Investit Academy

Email to Manager when a Candidate passes an exam

Subject: Exam result. Investit Academy

Ron Smith has completed and passed the following exam on "Date".

Exam Name: "Exam Name"
Grade: 83%

The results have been recorded in the Candidate's grade book. The Candidate has been sent the exam result.

Regards,

Investit Academy

Email to Manager when a Candidate fails an exam

Subject: Exam result. Investit Academy

Ron Smith has written the "101. How to Analyze and Value Income Properties" exam on March 10, 2016 and failed to pass the exam grade of 75%

We recommended that Ron reviews the course material and takes the "101. How to Analyze and Value Income Properties" "Practice Quiz" prior to re-writing the exam.

Exam Name: 101. How to Analyze and Value Income Properties
Grade: 55%

The results have been recorded in the Candidate's grade book. The Candidate has been sent the exam result.

Regards,

Investit Academy

Competency Test result

Email to Applicant

Note: An Applicant doesn't receive their grade. The grade is sent to the manager(s).

Subject: Test result. Investit Academy

Hello Ron,

Thanks for completing the Investit Academy commercial real estate competency test on Jan 21, 2016

Your grade has been forwarded to the manager

Regards,

Investit Academy

Email to Manager

Subject: Competency Test result. Investit Academy

Brian Jones has completed the Investit Academy commercial real estate competency test on February 1, 2016 and achieved a grade of 81%"

Regards,

Investit Academy

Certificate Completion
Email to Candidate

Subject: Congratulations. Investit Academy

Hello Ron,

The Investit Academy congratulates you on passing the exam requirements for the "Raising Your Commercial IQ" certificate program and wishes you all the best with your commercial real estate career.

Your certificate has been sent your manager who will present you with the certificate.

Regards,

Investit Academy

Certificate Completion
Email to Manager

Subject: Completion of Certificate. Investit Academy

Ron Smith successfully passed the "Raising Your Commercial IQ" certificate requirements on March 20, 2016

Attached are several PDF versions of the certificate Ron Smith.

Staples Office Supplies offers a number of attractive and professional blank certificates that you can use.

We suggest that Ron's accomplishment be formally recognized by presenting the certificate at a sales meeting or conference.

If you wish to congratulate Ron Smith" the contact information is:

Email: RSmith@gmail.com
Telephone: 650-988-9956

Regards,

Investit Academy

Transfer of Applicant to Candidate
Email to the Applicant

Welcome to the Investit Academy LMS

Hello Brian,

You have been granted access to the Investit Academy LMS.

Please use the following information to access the Investit Academy Learning Management System (LMS).

To access the Investit Academy LMS please login from the link on your organizations web site.
Username: Jwilliams
Password: J64williams

Regards,

Investit Academy

END