Investit Academy Learning Management System

Staff Operating Guide

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Overview and Objectives

The Investit Academy LMS enables 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 realtors.

Videos

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

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 <u>https://public.investitacademylms.com/moodle/login/index.php</u> 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.



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 office taking the educational courses
- 2. Manager(s) are assigned to the office
- 3. Proctor(s) Primarily administers exams
- 4. Applicants. Someone wishing to join an office and take the competency test

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

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	Yes	No	Yes	No
grades				

Each role has associated privileges as follows:

Notes.

Proctor. Is likely an 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 an 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

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.

Username		
Password		
Confirm Passw	ord	
The password n At least 1 upper	ust have at least 8 characters case letter(s)	
First Name		
Last Name		
Email Address		
Phone Number		
	Submit Rosot	

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

i territe i age	
Home	
Edit Profile	
	RAISING YOUR COMMERCIAL IQ
	There's a lot to learn
	THERE'S LOTS OF WAYS TO LEARN
	Videos, Manuals, Quizzes and Flash Cards
MANAGE	Mastery Challenges
Staff	
Candidates & Exams	Informative articles, check lists & Videos
Action	
	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

movideo (3-1/4 Hours)	T Manual
m Micro Videos	101. Flash Card Packs
Veractice Quiz	
102. Real Estate Investment Ana	lysis
📷 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	ent 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	

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 Тах 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

Videos

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

Checklists & References

Apartment Buildings
Caracterial Leasing
Leasing Terms and Definitions
Caracterial Check List

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 "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. An 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

Staff

Add Staff

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

MANA Show All Staf	GEMIENT of STAFF
	Add Manager
Username	
Password	
Confirm Password	
The password must ha	ave at least 8 characters
At least 1 upper case 1	letter(s)
Only symbols? <	> *) ($\& \land \%$ \$ # @ ! 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

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.

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 CUsername CFirst Name CLast Name CPhone Number CE-Mail		

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.

		Candidates				
	To adm	inister an exam or change the Can Click on first or last name	didate's profile			
		Search	Candidate Creat	e Candidate	Show All Ca	andidates
Search b	y © Username © First N	ame 🔘 Last Name 🔘 Phone Numbe	r ©E-Mail			
First Name Last Name	User Name	Email	Office	Telephone	Edit	
Donald Duck	donaldduck_investitlms	donaldduck_investitlms@demo.com	Investit Academy LMS Office 1	9999888800	× ⊙ ‡	

Click on Administer Exam from the Candidate menu.

Candidate Donald Duck
Competency Test Administer Exam Edit Profile Email Login Information
Exam Name
Back

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

	Donald Duck	
	Please select the Exam for candidate "Donald Duck"	
Exam	Select Exam	Submit
	Select Exam	
	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	
	Exam: 202. Creating and Profiting from Joint Ventures	

The chosen exam with be displayed

Candidate						
	Donald Duck					
	Competency Test Administer Exam Edit Profile Email Login Information					
You have successfully assigned "Exam: 101. How to Analyze and Value Income Properties" to "Donald Duck"						
	Exam Name					
	Exam: 101. How to Analyze and Value Income Properties	Start the Test	Delete			
Back						

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.

Candidate Donald Duck			
Competency Test Administer Exam Edit Profile Email Login Information			
You have successfully assigned "Exam: 101. How to Analyze and Value Income Properties" to "Donald Duck"			
Exam Name			
Exam: 101. How to Analyze and Value Income Properties			
Back			

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.

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 O Username O First Name O Last Name O Phone Number O E-Mail							
First Name	Last Name	User Name	Email	Office	Telephone	Edit	
Donald	Duck	donaldduck_investitlms	donaldduck_investitlms@demo.com	Investit Academy LMS Office 1	9999888800	× ◎ ‡	

Click on Competency Test from the Candidate menu.

Candidate Donald Duck
Competency Test Administer Exam Edit Profile Email Login Information
Back

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

	Please select the Test for candidate	
Test	Select Test	
	Select Test	
	Evaluation Test. Commercial Basics	

The chosen test with be displayed

Candidate Donald Duck					
Competency Test Administer Exam Edit Profile Email Login Information					
You have successfully assigned "Evaluation Test. Commercial Basics" to "Donald Duck"					
Exam Name					
Exam: 101. How to Analyze and Value Income Properties	Start the Test	Delete			
Test Name					
Evaluation Test. Commercial Basics	art the Test	Delete			
Back					

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.

Candidate Donald Duck					
Competency Test Administer Exam Edit Profile	Email Login Inforr	mation			
You have successfully assigned "Evaluation Test. Commercial Basics" to "Donald Duck"					
Exam Name					
Exam: 101. How to Analyze and Value Income Properties	Start the Test	Delete			
Test Name					
Evaluation Test. Commercial Basics	art the Test	Delete			
Back					

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

Applicants & Tests

An applicant applying for membership to join an 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



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



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.



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.

Applicants							
	To select applicant click on first or last name						
			Search Applicant	Create Applicant	Show All Applicants		
	Search by © Username © I	First Name © Last Name ©	E-Mail © Phone Number				
First Name	Last Name	User Name	Email	Office	Telephone		
Donald_Duck_test AppUser	TestUser	143testappuser	143testappuser@test.com	Donald_Duck_test	9999888800		

Click on Administer Test from the Applicant Menu



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

Donald_Duck_test AppUser TestUser Please select the Test for applicant Donald_Duck_test AppUser TestUser						
Test	Evaluation Test. Commercial Basics	 Submit 				
Send the Apr	Select Test	ormation				
Note: If the t	Evaluation Test. Commercial Basics	ave this 🔲				
unchecked.						
HELP						
Back						

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.

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				

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.

Evaluation Test. Commercial Basics				
Attempts allowed: 1				
Time limit: 3 hours				
Attempt exam now Home				

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.

	Applica	nt					
Donald_Duck_test AppUser TestUser							
You have successfully a	assigned "Evaluation Test. Commercia	l Basics" to "Donald_	_Duck_test	AppUser TestUser"			
Admini	Administer Test Edit Profile Change to Candidate Email Login Information						
	Donald_Duck_test AppUse	r TestUser's tests					
	Test Name						
Eva	luation 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



Grades

Exam Results

Exam Results

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

Start by selecting the course and select the candidate

Test :	Exam: 101.	How to Analyze and How to Analyze and Real Estate Investo	d Value Income Pro d Value Income Pro	operties		
Shc	Exam: 102. Exam: 103. Exam: 201. Exam: 202.	Development Analy Applied Real Estate Creating and Profit	vsis and Valuing La e Investment and L ing from Joint Vent	nd ease Analysis tures		
S	elect All	First Name	Last Name	User Name	Office	Email
		Cliff	Ronning	examCandidate	Investit Academy LMS Office 1	investit@investitsoftware.com

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

			Rej	port	
Test : Evaluation Report : Summa Show F Grade I	Test. Commercial Basics ary Grade Report ry Grade Report Report				
Select All	First Name	Last Name	User Name	Office	Email
	Donald	Duck	168testcanuser	Investit new office 1	168testcanuser@test.com
Show Report					

Click on "Show Report"

Exam: 101. How to Analyze and Value Income Properties					
Candidate		Summary Grade Re	eport		
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.

Candidates

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
Search Candidate Show All Candidates
Search by OUsername OFirst Name OLast Name OE-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				
Back						

Applicants

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".



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			
Back					

Evaluation Test Results

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

 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

Show F Grade	ry Grade Report Report				
Detaile Select All	d Report First Name	Last Name	User Name	Office	Email
				D. H.D. L.	
	Donald	Duck	143testcanuser	Donald_Duck_test	143testcanuser@test.com

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

Download table data as Excel spreadsheet Download						
Applicant		Summary Grade I	Report			
Donald Duck	74%	Date Attempted: January 31, 2019	Time Taken: 2 hours 43 mins			
Analysis. Basic (5)	0%	Cap Rates (14)	44%			
Finance (10)	0%	Income Multipliers (5)	60%			
Investment Analysis (8)	0%	Leasing (6)	0%			
Operating Expenses (4)	0%	Risk Analysis (8)	0%			
TVM, IRR & NPV (6)	0%	Taxes (6)	0%			

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

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"



3. Click on "Show Attempts" for the course



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

Donald Duck Exam Attempts Select exam to view progress								
	Exam			Attempt	s			
Exam: 101. How	to Analyze and Value In	come Prope	rties	1	Sh	ow Attempts		
Attempt	Marks Secured	Grade	А	ttempt I	Date	Status		
1	80/97	82%	:	12-07-20	17	Passed 🗲 🗕		
		Close						
Exam: 102. Real	Estate Investment Analy	vsis		2	Sh	ow Attempts		
Evaluation Test.	Commercial Basics		1	Sh	ow Attempts			
	(Back						

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



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 Candidate	Show All Candidates
Search by	© First Name ◎ Last Name	

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



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.

L	Log in
	seniormanager1
	Remember username
	Log in Forgotten password ?
N.	

Search by username	To reset your password, submit your username or your email address below. If we can find you in the database, an email will be sent to your email address, with instructions how to get access again.
Username	
Search by email address	Search
Email address	
	Search

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	${\ensuremath{\mathbb O}}$ Username ${\ensuremath{\mathbb O}}$ First Name ${\ensuremath{\mathbb O}}$ Last Name ${\ensuremath{\mathbb O}}$ Phone Number ${\ensuremath{\mathbb O}}$ E-Mail		

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



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.

	The password must have x least 8 characters, at least 1 lower case letter(s), at least 1 upper case letter(s)
New password ③	••••••
First name*	Neil
Surname*	Osborne
Email address*	nosborne@investitsoftware.com
Phone	604-988-9964
Organization	Investit Academy LMS
Office	Investit Academy LMS Office 1
	Update profile

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 settings 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.

	+ Add an activity or resource
Joint Ventures	
 ♥ ▲ Waterfall Distributions ▲ 	Edit▼
	+ Add an activity or resource

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,

-

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,

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,

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,

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,

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,

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,

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