



LIBERTY

# Learning University

## Getting Started Guide

## Contents

The aim of this guide is to provide an introduction to using the Learning University.

Refer to the table below for more information.

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## Introduction

The Learning University is the next generation of self-paced learning and online accreditation at Liberty. It has been established to provide you with an online learning community that will assist and guide you in an ongoing learning environment to foster individual and organisational learning and knowledge.

In the Learning University, you will be able to access courses containing learning content, accreditation exams and other activities, and also be able to view grade books.

## Accessing the Learning University Portal

You can access the Learning University directly by using the following link:

<http://learning.liberty.co.za/>

## Obtaining Username and Password

Send an email to [accreditation@liberty.co.za](mailto:accreditation@liberty.co.za) with the following information:

- First name and surname
- Email address
- 13 digit SA ID number
- Telephone numbers
- Channel, Region and Branch name.

## Logging into the Learning University Homepage

In the Login block, enter your 13 digit ID number and Password, as given to you by the Learning Coordinator and click on the **Login** button or press Enter.

The screenshot shows the Learning University homepage. At the top, there is a navigation bar with links: Home, Masterclasses, Course Categories, My Courses, My Reports, Course Registrations, SAS FNA Tool, and Financial Planning Process. A 'Help' button is in the top right corner. Below the navigation bar is the Liberty logo and the text 'You are not logged in. (Login)'. The main content area features a 'Welcome to the Group Distribution: Learning University' message. There are two main columns of course categories: 'Onboarding' (including Pre-Contract Training, Supervisory Phase Development Path, Outlying Induction, Experienced Adviser Orientation, and Experienced Adviser Onboarding) and 'Fit & Proper' (including Product Specific Training, Continuous Professional Development (CPD), Class Of Business Training, and Field Communications). A 'My PST Transcript' link is at the bottom of the 'Fit & Proper' column. Below these columns is a red banner for 'IN THE SPOTLIGHT' with links for 'CAREER STAGE DEVELOPMENT PATH' and 'PRACTICE ANALYSER'. On the right side, a green-bordered box highlights the login form, which includes fields for 'Username' and 'Password', a 'Login' button, and a 'Lost password?' link. A red arrow points upwards from below the login form towards the 'Login' button.

You will know that you have logged in successfully when your name appears on the top right hand corner of the screen.

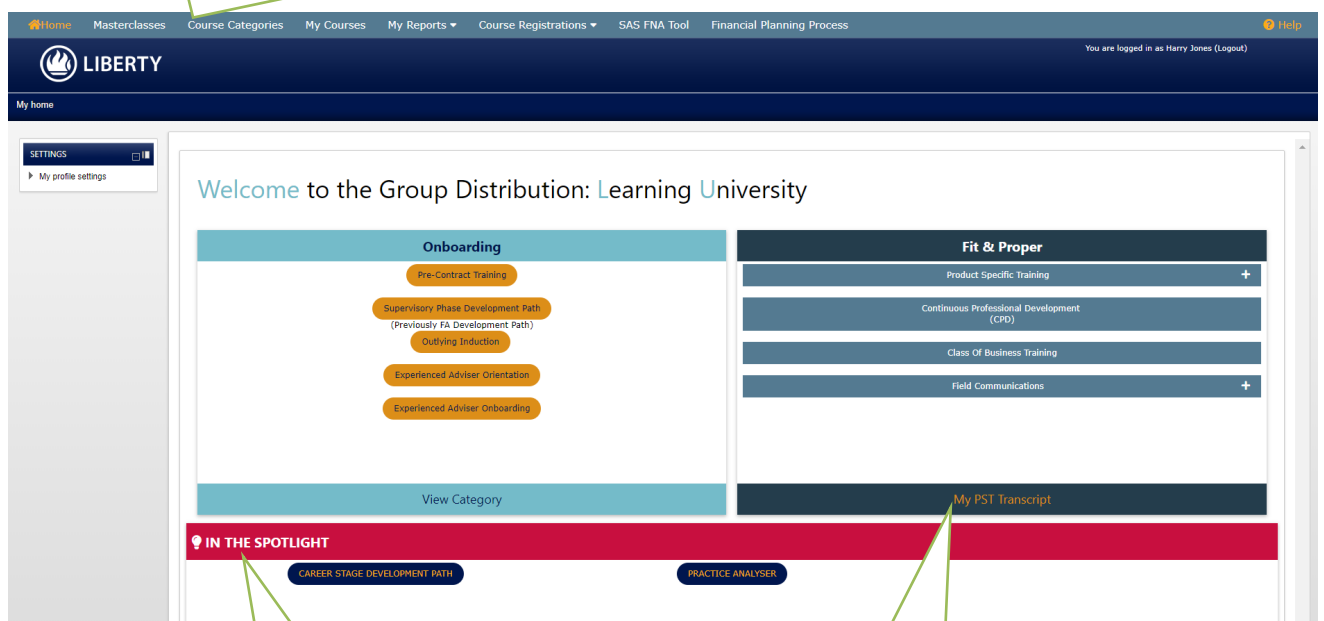
The screenshot shows the Learning University homepage after a successful login. The navigation bar now includes 'Home' and 'Site pages' on the left, and 'You are logged in as Test ZStudent (Logout)' on the right. The Liberty logo and 'LIBERTY' text are visible. A green-bordered box highlights the 'Logout' link. A callout box with a green border points to the 'Logout' link and contains the text: 'Click here to log out of the Learning University.'

## Overview of the Learning University Homepage

On the homepage you will see a series of "buttons". These buttons link to different categories of learning and learning programmes. Click on the buttons to access the content.

You can also access additional learning programmes and courses by clicking on the "Course Categories" link on the top menu bar.

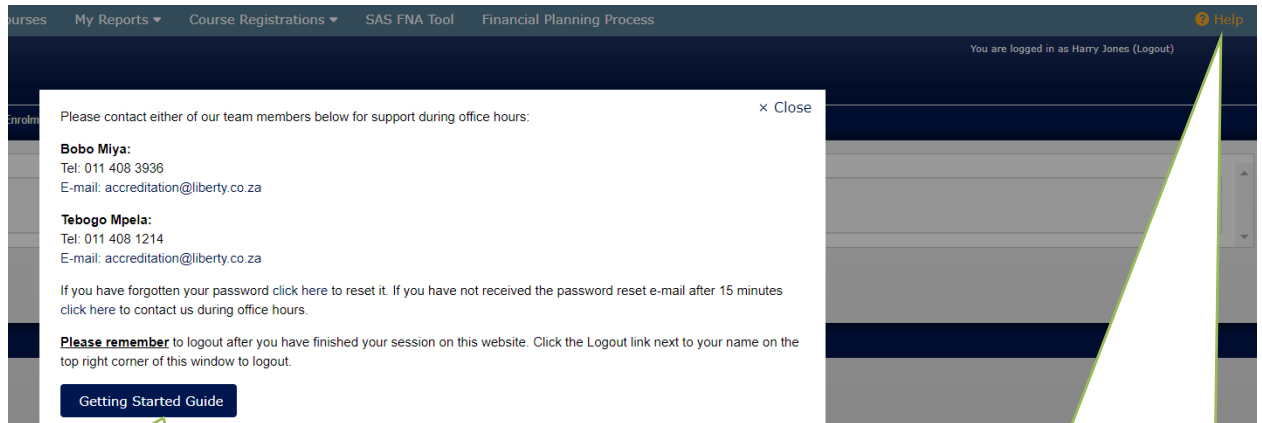
A full accreditation list is available in "My Reports".



Look out for important messages or new learning interventions under the "In the Spotlight" section.

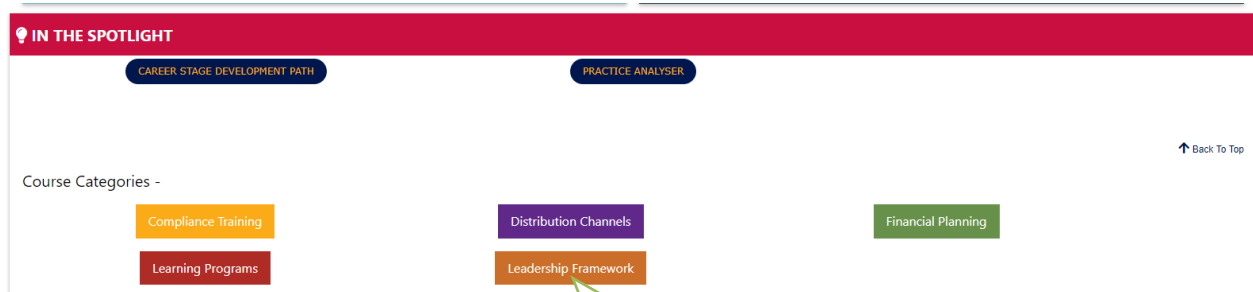
You can view and print a transcript of all your product specific exam results by clicking on the "My PST Transcript" button.

## Overview of the Learning University Homepage (cont/...)



An online copy of this guide is also available.

Clicking on the "Help" link will provide you with the contact details of the Learning University support team.



You can also access the course categories, by clicking on the buttons below the "In the Spotlight" buttons.

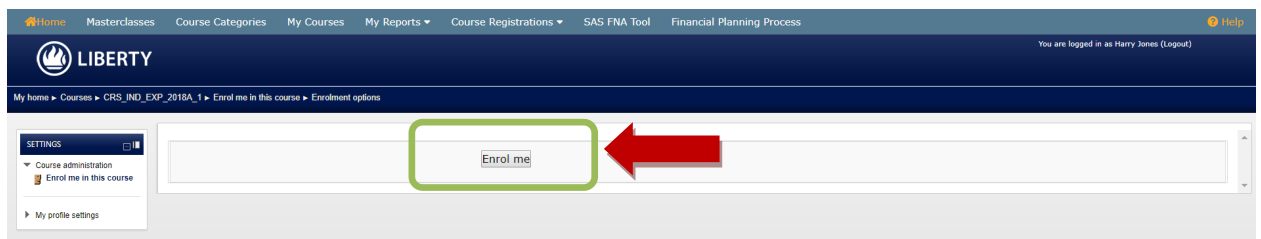
## Enrolling into a Course

When you click on a course link for the first time, an **"Enrol Me"** button may appear.

Click on the button to enrol into the course.

For some courses, you will be requested to input an enrolment key. Your Manager or Learning Specialist should provide this to you.

You will only be required to do this the first time you access.



## Navigation through a Course

Now that you are enrolled into a course, you will be able to view the contents.

The example below shows that the learner has enrolled into the Experienced Adviser - Orientation course.

There are a number of ways to move around a course. The best way is through the internal navigation bar or "Breadcrumbs", which are positioned on the top left of the screen.

Each breadcrumb represents a screen you have moved through. To move back to a previous screen, you can use the back button on your internet browser, or click on the appropriate breadcrumb.

Click the home button to return to the homepage.

Breadcrumbs.

Use this "Settings" area to view your grades for each exam.

Click on the links to view the learning material.

Any upcoming events related to this course will be displayed in this Block.

View your Learning University Profile.

Welcome to the Liberty Experienced Adviser orientation programme.  
Liberty is more than just our name; it's what we stand for. Making a difference in people's lives, by making their financial freedom possible. This is our passion and our purpose. It is what drives us as a people, and as a business.

Depending on how a course has been set up, this block may appear showing the status of activities in your course.

Click on the **More Details** link to view the status for each individual activity.

## Navigation through a Course (Cont/...)

Each Course/lesson/activity will have its own set of navigation instructions.

It is very important that you read all the instructions, on each activity, very carefully.

A screenshot of the Liberty Learning University content area. It features three main sections: "About Liberty", "Code of Conduct", and "Professionalism".  
1. "About Liberty" section: A blue header bar is followed by a list of three items: "About Liberty", "Some Insights into the Refreshed Liberty Strategy", and "The Refreshed Liberty Strategy Map". A red arrow points to the second item.  
2. "Code of Conduct" section: A blue header bar is followed by a rounded rectangular box containing two paragraphs of text. A red arrow points to the second paragraph.  
3. "Professionalism" section: A blue header bar is followed by a rounded rectangular box containing two paragraphs of text.  
A vertical grey bar is on the left side of the content area.

## Exams and Assessments

Click on the exam link in the course and click "Attempt quiz now".

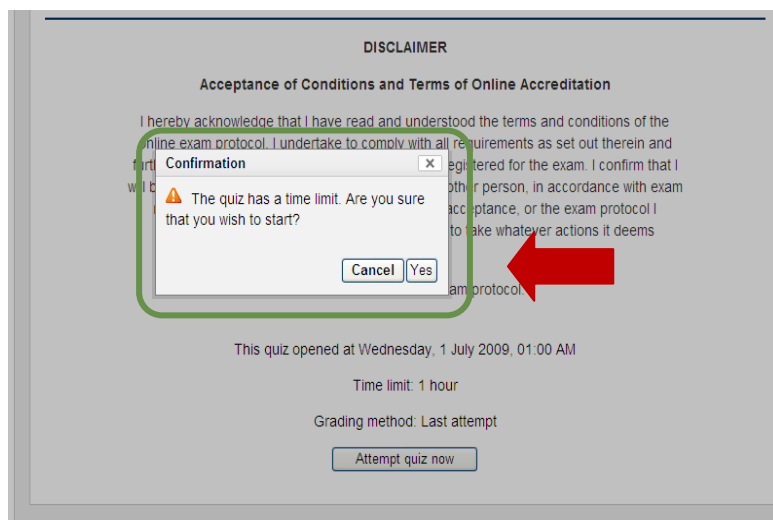
The screenshot displays the Liberty LMS interface for an exam. The top navigation bar includes links for Home, Masterclasses, Course Categories, My Courses, My Reports, Course Registration, SAS FNA Tool, and Financial Planning Process. The breadcrumb trail shows: My home > Courses > CRS\_IND\_EXP\_2018A\_1 > Topic 1 > LP - Overview Exam > Info.

Key elements and callouts on the exam page:

- Disclaimer:** A section titled "DISCLAIMER" with the heading "Acceptance of Conditions and Terms of Online Accreditation". It contains a paragraph of legal text and a link to "Click here to review the exam protocol." Below this, it states "Only 3 attempts are allowed on this exam." A callout box points to this text: "Read the exam disclaimer and protocol before attempting the exam."
- Attempts:** The text "Attempts allowed: 3" is displayed. A callout box points to it: "This indicates the number of attempts allowed on the exam/assessment."
- Start Date:** The text "This quiz opened at Thursday, 15 June 2017, 06:00 AM" is shown. A callout box points to it: "This indicates the date on which this exam opened. Some exams are only open for a certain period of time and if this is the case, a close date will also be displayed here."
- Time Limit:** The text "Time limit: 40 mins" is shown. A callout box points to it: "This indicates the time allowed in which to complete an exam – the exam must be submitted within the specified time limit."
- Action Button:** A button labeled "Attempt quiz now" is located at the bottom of the page. A red arrow points directly to this button.

## Exams and Assessments (cont/....)

A dialogue box will appear. Click **Yes** if you are ready to start the exam.



The relevant exam questions will be displayed.

When you have completed all the questions in the exam, scroll to the bottom of the screen, and click on the **Next** button.

## Exams and Assessments (cont/....)

A summary review of the questions you have answered will be displayed.

Click the **Submit all and finish** button.

If you miss out a question or want to review a question, simply click on the question number and you will be taken back into the exam to the relevant question

23	Not answered
24	Answered
25	Answered
26	Not answered
27	Answered
28	Answered
29	Not answered
30	Answered
31	Not answered
32	Answered
33	Answered
34	Answered
35	Answered
36	Not answered
37	Answered
38	Answered

Time left **0:00:40**

**Submit all and finish**

## Exams and Assessments (cont/....)

The exam will be auto-marked and your result will be displayed as a mark i.e. 30/35. The percentage will be displayed in the grade book.

You will receive feedback informing you that you have passed or not.

You will be able to view your result as a percentage in the grade book.

The screenshot shows an online exam interface. On the left is a navigation menu with a tree structure: '...ing Content (Not for Study School 1 Delegates)', 'Entry Level Market Exams', 'ASISA', 'Growth Maximiser Exam', 'CRS\_EX\_BIS', 'CRS\_EX\_GIS\_600', 'CRS\_EX\_Intro' (expanded), 'Participants', 'Topic 1', 'Topic 2', 'Topic 3' (expanded), 'Introduction to Life Assurance Exam' (checked), 'Info', and 'CRS\_EX\_LMS'. Below the menu is a 'SETTINGS' section with 'Course administration' and 'My profile settings'. The main content area displays an exam protocol, a 'Click here to review the exam protocol.' link, and exam details: 'This quiz opened at Wednesday, 1 July 2009, 01:00 AM', 'Time limit: 2 mins', and 'Grading method: Last attempt'. A 'SUMMARY OF YOUR PREVIOUS ATTEMPTS' table is shown:

Attempt	Completed	Grade / 38	Review	Feedback
1	Wednesday, 8 June 2011, 05:59 PM	0	Not permitted	Sorry. You have not passed this exam.
2	Wednesday, 8 June 2011, 06:28 PM	32		Congratulations. You have passed this exam.

Below the table, it says 'LAST ATTEMPT: 13 / 38.' and 'OVERALL FEEDBACK: Congratulations. You have passed this exam.' A message states: 'You must wait before you may re-attempt this quiz. You will be allowed to start another attempt after Thursday, 9 June 2011, 06:28 AM.' with a 'Continue' button.

### Please note

For most exams and assessments you are able to do a 2<sup>nd</sup> exam attempt immediately after the 1<sup>st</sup> attempt. All further exam attempts will have a 12 hour time delay between each attempt.

This rule may vary for exams or assessments in other courses.

## Viewing Results

1. You can view your exam results by clicking on the grade book link
2. You can track your activities by reviewing details under the "Course Completion Status" block

The screenshot shows the Liberty LMS interface. The top navigation bar includes links for Home, Masterclasses, Course Categories, My Courses, My Reports, Course Registrations, SAS FNA Tool, and Financial Planning Process. The user is logged in as Harry Jones. The main content area displays the 'Experienced Adviser Programme - Orientation' page, which includes a video player and a sidebar with 'About Liberty', 'Compliance', and 'Social Styles' sections. The 'SETTINGS' sidebar on the left has a 'Grades' link highlighted with a red arrow. The 'COURSE COMPLETION STATUS' block in the right sidebar shows 'Status: In progress', 'Required criteria', and 'Activities completed 4 of 59', with a red arrow pointing to the 'More details' link.

## Example of a grade book

Grade item	Grade	Range	Percentage
Experienced Adviser Course 2018			
About Liberty			
Liberty Advisory Partners Code of Ethics and Conduct	-	0-100	-
Lesson 2: Liberty Dress Code	-	0-1	-
Activity: Time Management: Self-Reflection Activity	-	0-1	-
<b>Category total</b>	<b>-</b>	<b>0-100</b>	<b>-</b>
Anti-Money Laundering			
AML Overview	-	0-1	-
Lesson 1: Prevention Of Organised Crime Act (POCA)	-	0-1	-
AML Lesson 2: FICA Overview	-	0-1	-
FICA Control Measure Overview	-	0-1	-
FICA Part 1: Duty to Identify Clients	-	0-1	-
FICA Part 2: Duty to Keep Records	-	0-1	-
FICA Part 3: Reporting Duties and Access to Information	-	0-1	-
FICA Part 4: Measures to Promote Compliance by Accountable Institutions	-	0-1	-
FICA Part 5: Referral	-	0-1	-
FICA Guidelines For Financial Advisers	-	0-1	-

## Example of Course Completion Status report

My home ► Courses ► CRS\_IND\_EXP\_2018 ► Completion progress details

**NAVIGATION**

- My home
- Site home
- Site pages
- My profile
- My courses
- ▼ Courses
  - ▼ CRS\_IND\_EXP\_2018
    - Participants

**Status:** *In progress*

**Required:** All criteria below are required

Criteria group	Criteria	Requirement	Status	Complete	Completion date
Activities completed	About Liberty	Viewing the page		Yes	
(all required)	Some Insights into the Refreshed Liberty Strategy	Viewing the page		Yes	
	The Refreshed Liberty Strategy Map	Viewing the page		Yes	
	Liberty Advisory Partners Code of Ethics and Conduct	Viewing the scorm		No	-
	Lesson 1: Infographic: First Impressions	Viewing the url		Yes	
	Lesson 1: Guidelines for Facebook, LinkedIn and Twitter	Viewing the url		No	-
	Lesson 2: Infographic: LinkedIn Tips	Viewing the url		No	-
	Lesson 3: Infographic: Twitter Tips	Viewing the url		No	-
	Lesson 4: Infographic: Facebook Tips	Viewing the url		No	-
	Lesson 1: Video: Intro to Time Management Activities (1 minute)	Viewing the url		No	-
	Lesson 2: Infographic: Tips to manage your Time	Viewing the url		No	-
	Lesson 3: Infographic: How to reduce interruptions	Viewing the url		No	-
	Activity: Time Management: Self-Reflection Activity	Achieving grade		No	-
	Introduction to Compliance	Viewing the page		No	-

### Important Note:

Only the result for your highest attempt on an exam will be displayed in the grade book.

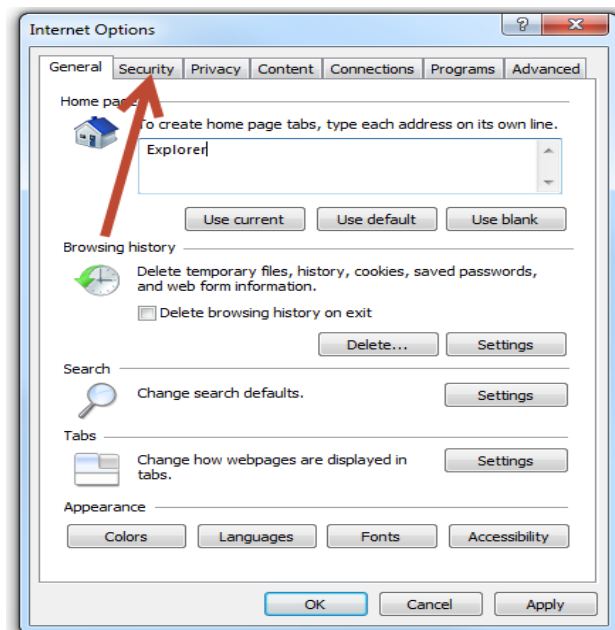
## Troubleshooting

There are 3 options as to why a delegate may not be able to get past the “return to course” screen.

- 1) Allowed Site
- 2) Pop-up Blocker
- 3) Google Toolbar

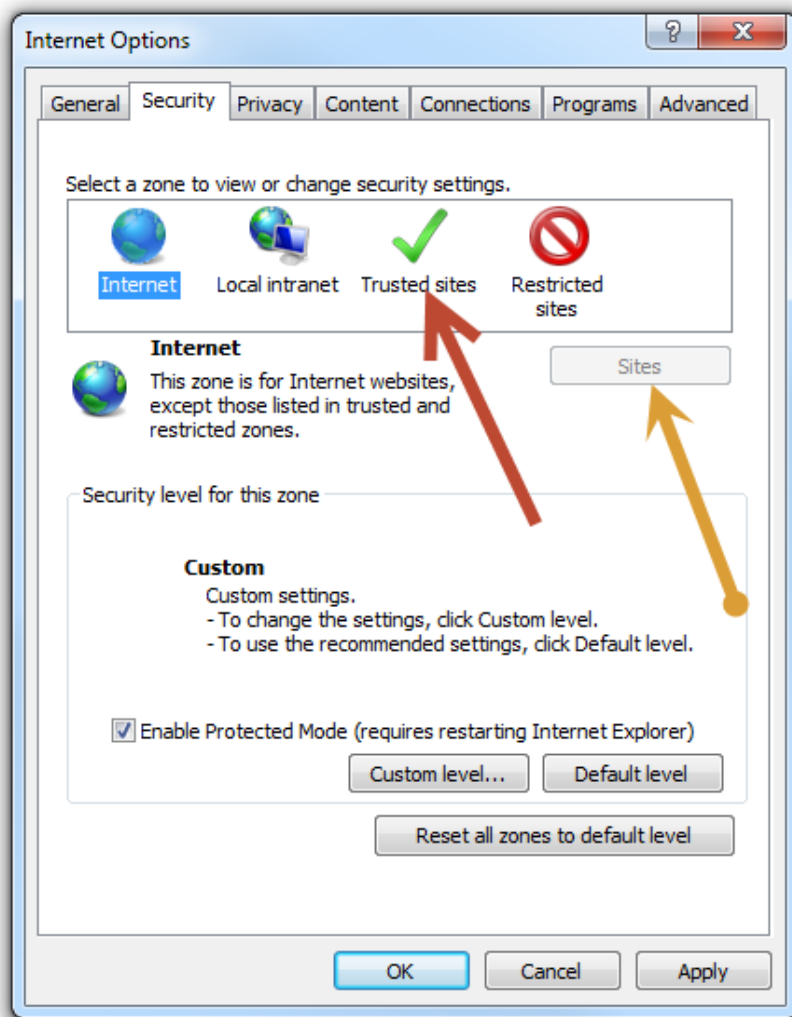
### Allowed Site

- Allow <http://learning.liberty.co.za> as an ALLOWED SITE in the Internet Explorer popup blocker
- Access Internet Explorer
- Tools
- Click on Security tab



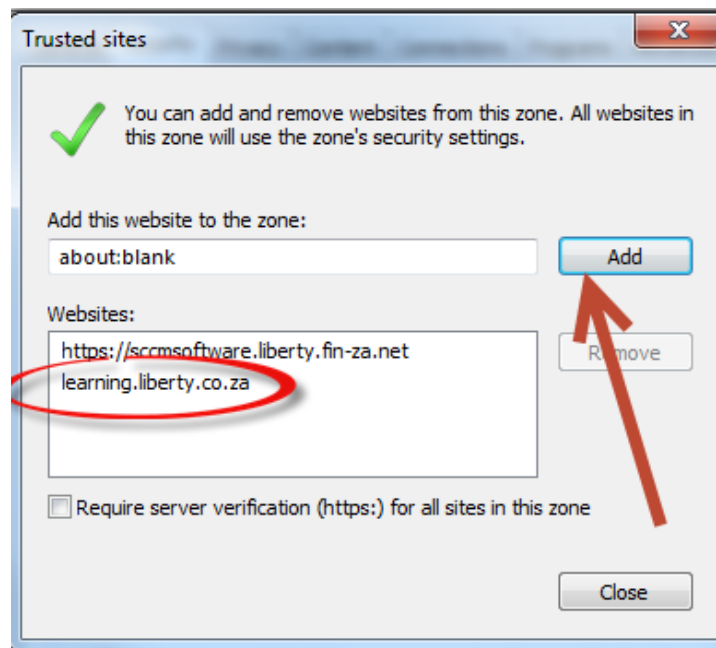
## Troubleshooting (Cont/...)

- Click on Trusted sites
- Sites button will activate
- Click on Sites button



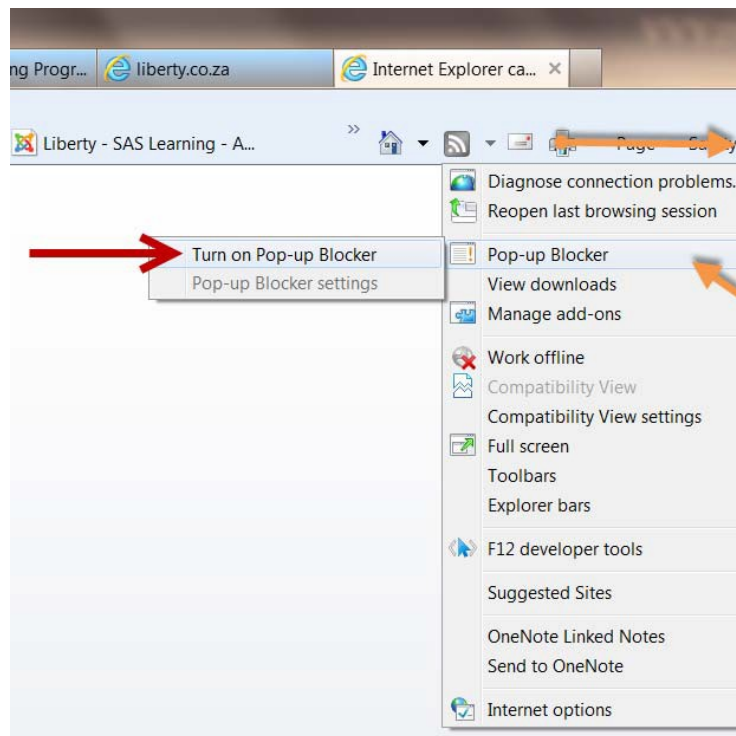
## Troubleshooting (Cont/...)

- Learning.liberty.co.za should be in websites block
- If not, type learning.liberty.co.za in the “Add this website to the zone” field
- Click on Add and then Close.



## Pop-up Blocker

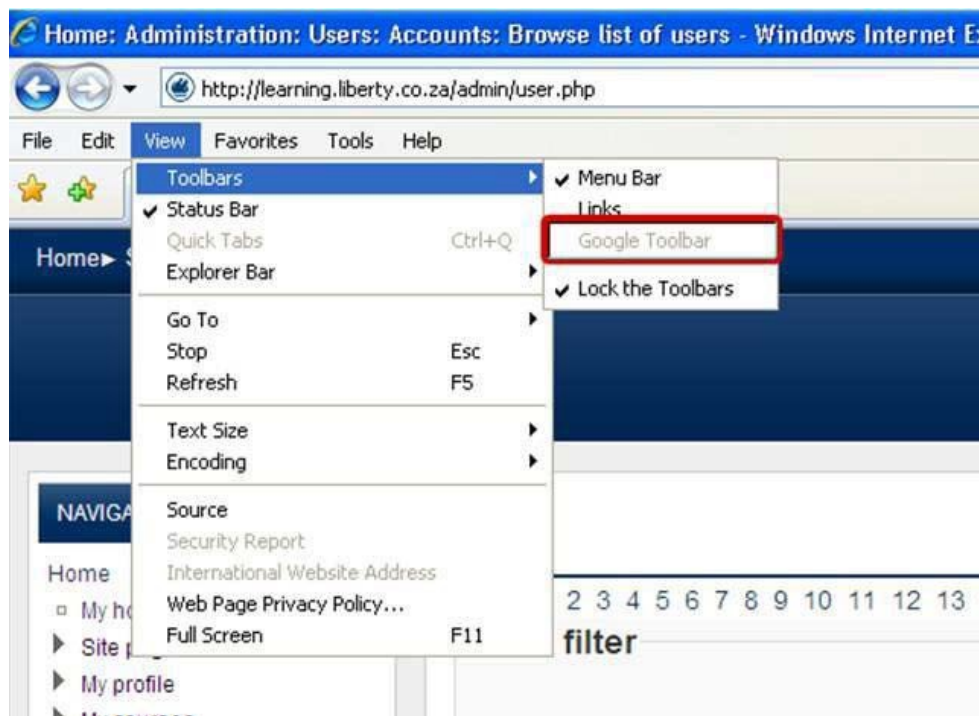
TURN OFF the popup blocker altogether.



## Troubleshooting (Cont/...)

### Google Toolbar

Make sure that the “**Google Toolbar**” is turned **off** (see screenshot below)



## Contact Details

Should you require any assistance with accessing the Learning University, or experience any problems while working through the course, please send an email to [accreditation@liberty.co.za](mailto:accreditation@liberty.co.za).