To edit an existing rubric .................................................................................................................................................. 25

**The Template Tab** .................................................................................................................................................. 26

To create a Template: ................................................................................................................................................... 26

The Template Page ....................................................................................................................................................... 27

**The Banner Menu** .................................................................................................................................................. 28

**The Component Area** .............................................................................................................................................. 28

Resource Components .................................................................................................................................................. 28
Input Components ......................................................................................................................................................... 29
Question Components .................................................................................................................................................... 29
Reference Components ................................................................................................................................................... 29
Assessment Components ................................................................................................................................................ 29

**The Content Area** .................................................................................................................................................. 30

To add template sections: ............................................................................................................................................. 30
To delete template sections: .......................................................................................................................................... 30
To add components to a template section: .................................................................................................................... 30
To delete a component from a template section: .......................................................................................................... 31
To move a component to a different location: .............................................................................................................. 31

**The Assessment Panel** .......................................................................................................................................... 32

To add rubrics, a scoring box, or feedback box to the assessment panel: ................................................................. 32

Saving a Completed Template ........................................................................................................................................ 33

To edit an existing template: .......................................................................................................................................... 33

Activities ........................................................................................................................................................................ 33

To create an activity within a single group: ..................................................................................................................... 34
To create and distribute an activity to multiple courses: ............................................................................................... 36

Getting Help .................................................................................................................................................................. 38

**The Help Center** ...................................................................................................................................................... 38

To access the Help Center: ............................................................................................................................................... 39
Who is this Guide for?
This guide is intended for LiveText via users who will be responsible for the setup and management of Via for their organization unit. These users have/are given specific abilities and are called administrators.

Accessing via™
To access your via™ account, visit www.vialivetext.com. Enter your email address and password.

Roles
Via™ defines several roles that allow users to be logically divided based on the tasks they will be performing. The primary roles include administrator, group owner, and submitter. For each role, via provides a unique interface which optimizes workflow and displays role-specific content.

The Administrator Role
The administrator role is responsible for building the hierarchy for an organization unit, creating and defining user accounts, building groups, creating standards, and generating reports on collected data.
The Administrator Home Page

After logging in, the Administrator homepage will display. The homepage is divided into three sections: the area selection section across the top, the workspace list on the left side, and the workspace on the right side.

Area Selection

In the Area Selection section of the homepage, there are 3 primary buttons: Hierarchy, Import, and Settings. Clicking on these buttons will display the corresponding area of the Administrator's homepage. The options found in the workspace and workspace list are based on the Area Selection button chosen.

The Hierarchy Area

The Hierarchy area is displayed immediately after logging into an administrator account, or when the Hierarchy area selection button is clicked. The Hierarchy area has two sections. The left side allows an administrator to view and create a tier list. The right side provides a workspace containing several options for viewing, creating, and editing components and resources that provide the framework for the day to day usage of via.
The Hierarchy Tier List

The tier list is a fundamental part of Via. It establishes the structure of the organization, as well as users' access to resources. The tier list can be created and viewed on the left side of the Hierarchy area. The top tier is created by via. Within this top tier, administrators can create secondary tiers. Within 2nd level tiers, administrators can create 3rd level tiers, and 4th level tiers within 3rd level tiers.

To create a tier list:

1. Highlight the existing tier inside which the new tier will be created.
2. Click the Plus button, located in the top left corner of the hierarchy tier list section.
3. Type the name of the new tier and press enter.

NOTE: Once a tier is created, it is permanent and cannot be moved or deleted. However, a tier's name can be changed.

To change the name of a tier:

1. Highlight the existing tier to be changed.
2. Click the Pencil button, located to the right of the Plus button.
3. Type in the new name and press enter.

As users are created, they are placed into a tier. As administrators create various resources, they create those resources within a tier. The relationship between a user's tier and a resource's tier determines whether a user can access a resource. The rules governing access follow a "top down" model:

1. A resource created at the top tier is accessible to all users.
2. A resource created at a second tier is accessible only to users in that secondary tier. If the secondary tier has a third and fourth tier within it, users in those tiers have access as well.
3. A resource created at a third tier is accessible only to users in that third tier. If the third tier has a fourth tier within it, users in that tier have access as well.
4. A resource created at a fourth tier is accessible only to users in that fourth tier.

The Hierarchy Area Workspace
The Hierarchy workspace occupies the right side of the Hierarchy Area home page. This section allows an administrator to create, view, and edit components and resources for tiers and the users in those tiers.

There are five tabs at the top of the Hierarchy workspace. They include Admin, Group Template, Template, Rubric, and Standard. The settings and options within each of these tabs is specific to the tier that is highlighted.
The Admin Tab
The Admin tab allows the assignment of tier administrator rights to a user account. By highlighting a specific tier, a unique account can be assigned as administrator to each tier.

To assign administrator rights to a user account:

1. Click the Hierarchy button located at the top of the page.
2. On the right side of the page, click the Admin tab.
3. Highlight the tier to which an administrator will be added. To highlight the tier, click on it.
4. Click the Insert Admin button.

5. In the 'Name' dropdown menu, select the user account to be added.

**NOTE:** The user account list can be filtered according to role by clicking the Role dropdown menu and selecting a specific user role.

6. Click the Save button.

**TIP:** If a user account is added in error, the account can be removed by clicking the trashcan icon in the far-right Operation column.
The Group Template Tab

The Group Template tab is used to create, edit, and view group templates associated with a tier. A group is composed of members and a group owner. Groups are created by first building a group template in which the groups will be contained. A group template contains groups that will utilize the same templates. Commonly, a group template can be considered a course, while a group can be thought of as a section.

**Group Templates**

**To create a new group template:**

1. Click the **Hierarchy** button, located at the top of the page.
2. On the right side of the page, click the **Group Template** tab.
3. Highlight the tier in which the group template will be added. To highlight the tier, click on it.
4. Click the **Create Group Template** button.
5. In the Name text field, type a name for the group template.
6. From the Category dropdown menu, select course or group.
7. In the Code text field, type in an identifier unique to this group template.
8. In the Homepage Template dropdown menu, select which homepage template should be displayed for every group in this group template.
9. Click the **Create** button.

To edit an existing group template:

1. Click the **Hierarchy** button located at the top of the page.
2. On the right side of the page, click the **Group Template** tab.
3. Highlight the tier in which the group template is located. To highlight the tier, click on it.
4. From the group template list, hover the pointer over the group template to be edited.
5. Click the **Edit** button that appears on the far right end of the group template listing.
Groups
Groups are composed of a Group Owner and members. In the context of academia, a Group Owner is an instructor, and members are students. Groups will appear on Group Owners' and Group Members' In Progress tab.

By default, all groups in via™ remain open indefinitely. However, once a group has been deemed complete, administrators can close a group. Closing a group will remove the group from the In Progress tab for all members of the group, and add the group to members' timelines. Closing a group will also prevent any further submission or assessment of the group's activities. Closed groups can be reopened, returning the group to the In Progress tab for its members.

To create and add new groups to a group template:

1. Click the Hierarchy button located at the top of the page.
2. On the right side of the page, click the Group Template tab.
3. Highlight the tier in which the group template is located. To highlight the tier, click on it.
4. In the group template list, click the title of the group template to which groups will be added.

6. Edit the group template.
7. Click the Save button.
5. Click the **Create Group** button.

6. In the Group Name text field, type in the name of the group.
7. In the Owner dropdown menu, select the user account that will be the group owner.
8. In the Term dropdown menu, select the term in which to create the group.
9. In the Start field, select the start date for the group.
10. In the End field, select the end date for the group.
11. Click the **Save** button.
To edit an existing group:

1. Click the Hierarchy button located at the top of the page.
2. On the right side of the page, click the Group Template tab.
3. Highlight the tier in which the group template containing the group to be edited is located. To highlight the tier, click on it.
4. From the group template list, click the title of the group template that contains the group that will be edited.
5. Find the group to be edited, and click the paintbrush icon located in the Operation column.

6. Edit the Group.
7. Click the Save button.
To close or reopen a group:

1. Click the Hierarchy button located at the top of the page.
2. On the right side of the page, click the Group Template tab.
3. Highlight the tier in which the group template containing the group to be closed or reopened is located. To highlight the tier, click on it.
4. From the group template list, click the title of the group template that contains the group that will be closed or reopened.
5. Find the group to be closed or reopened, and click the Open/Closed slider icon located in the Operation column.

Introduction to Philosophy

Memberships
When members are added to a group, they are organized into roles. Roles are used to assign responsibilities to members. In typical academic assessment, the most common role is student.

When creating memberships of a group, the first step is to create a role. After the role is created, users are added to the role, making them members of the group.

NOTE: Most commonly, memberships are created in via™ by using an import process. The following describes the manual process, and is best used when creating very small memberships, or editing existing memberships.

To add new members to a group:

1. Click the Hierarchy button located at the top of the page.
2. On the right side of the page, click the Group Template tab.
3. Highlight the tier in which the group template is located. To highlight the tier, click on it.
4. In the group template list, click the title of the group template containing the group to which members will be added.
5. From the group list, locate the group to which members will be added.
6. Click the Gear icon in the row of the group.

6. Click the Members tab.
7. Click the Create Role button.

8. On the Create Role popup window, type in a name for the new role.
9. Click the Save button.
10. Click the 3 dots menu icon for the new role.

11. Click Add Member.

12. On the Add Member popup window, click the dropdown menu and select a user account to add as a member to the group.

13. Click the Save button.

TIP: User accounts can be quickly located by clicking the dropdown menu and typing a name.
14. Repeat steps 11-14 for all members of the group.

Adding Templates to Group Template
When templates are added to a Group Template, those templates become available for use by any Group Owner that owns a group in the Group Template. [See The Template Tab section.]

To add templates to a group template:

1. Click the Hierarchy button located at the top of the page.
2. On the right side of the page, click the Group Template tab.
3. Highlight the tier in which the group template is located. To highlight the tier, click on it.
4. In the group template list, click the title of the group template to which groups will be added.
5. At the top of the page, click the Templates tab.

6. Click the Insert Template button.
7. Click the checkbox for each template that will be added to the group template.
8. When finished adding, click the Save button.
The Standard Tab
The Standard tab is used to create and view standards. Standards are concise and specific descriptions of an organization's expectations of and goals for its members. Within via™, standards can be aligned with rubrics to allow correlations to be made between these defined expectations and member performance. A standard set contains a group of standards that are related to each other. To create a standard, a standard set must first be created to contain individual standards.

To create a standard set:

1. Click the Hierarchy button located at the top of the page.
2. On the right side of the page, click the Standard tab.
3. Highlight the tier in which the standard set will be added. To highlight the tier, click on it.
4. Click the **Create New Set** button.
5. In the Set Title text field, type in a title for the standard set.
6. In the Set Abbreviation text field, type in an abbreviation for the set.
7. Click the **Save** button.

**NOTE:** Once a standard set is created, it is permanent and cannot be edited or deleted.

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**To create a standard:**

1. Click the **Hierarchy** button located at the top of the page.
2. On the right side of the page, click the **Standard** tab.
3. Highlight the tier in which the standard will be added. To highlight the tier, click on it.
4. In the standard set list, click the **Create New Standard** button below the title of the set to which a new standard will be added.
5. In the Standard Title text field, type in a title for the standard.
6. In the Standard ID text field, type in an ID for the standard.
7. In the Standard Description text field, type in a description of the standard.
8. Click the **Create** button.
9. Repeat the above steps for each standard.
The Rubric Tab
The Rubric tab is used to create, edit, and view rubrics associated with a tier. A rubric is a table used to define assessment criteria and to evaluate the submitter’s performance of each criterion. Rubrics are a component of a template and are scored through the template.

To create a rubric:

1. Click the Hierarchy button located at the top of the page.
2. On the right side of the page, click the Rubric tab.
3. Highlight the tier in which the rubric will be added. To highlight the tier, click on it.
4. Click the Create Rubric button.
5. On the create rubric page, type a title for the rubric into the Title field.
6. Add or delete levels and elements as necessary.
7. To add descriptions, click the description box, and type in the desired text. To change the label of elements and levels, click the labels and type in the desired text. For each level of an element, point values can also be added.

8. To map standards to an element, click the SELECT STANDARDS button.
1. To edit a rubric, hover the pointer over a rubric, and click the pencil icon.

2. Choose a standard set from the Set drop down menu.

3. When finished mapping standards, click the mapping page SAVE button.

4. When finished building the rubric, click the create rubric page PUBLISH button to make the rubric usable in templates.

TIP: Instead of publish, clicking the Save button will save the rubric but will not make it available for use in a template.

NOTE: Once a rubric has been published, it can still be edited. However, the rubric's point values and associated standards are "locked in" and cannot be changed. Additional standards can be added at any time.

To edit an existing rubric:

1. Click the Hierarchy button located at the top of the page.
2. On the right side of the page, click the Rubric tab.
3. Highlight the tier in which the rubric is located. To highlight the tier, click on it.
4. From the rubric list, hover the pointer over the group template to be edited.
5. Click the Edit button that appears on the far right end of the group template listing.
6. Edit the rubric.
7. Click the Publish or Save button.

**NOTE:** If edited a previously published rubric, only the Publish button will be available.

**The Template Tab**

The Template tab is used to create, edit, and view templates associated with a tier. A template is a customizable, interactive document that defines the requirements of a submission. A template acts as a container, providing a single document in which a submitter can enter text and images, respond to questions and tasks, attach files, and create links to their Timeline or portfolio. It also includes any rubrics that will be used for assessment or grading. To be submitted and/or assessed, templates are included in activities.

Every template has a specific type of workflow. The workflow type defines how and by whom the template will be submitted and assessed.

Workflow types include:

1. **Standard Workflow** - Submitters complete and submit a template and the template is assessed by a supervisor.
2. **Peer Review Workflow** - Submitters complete and submit a template. The template is then randomly assigned for assessment to another submitter or peer. After peer assessment, the template is assessed by a supervisor.
3. **Assisted Assessment Workflow** - Submitters complete and submit a template. The template is then assessed by a third party assessor or coordinator. After coordinator assessment, the template is assessed by a supervisor.
4. **Form Submission Workflow** - Submitters complete and submit a template. The assessment step is skipped, and the data from the student submission is available for reporting. [forms, surveys, etc.]
5. **Observational Assessment Workflow** - The submission step is skipped, and the template is assessed by a supervisor. [oral presentations, dispositions, etc.]
6. **Group Homepage Workflow** - This special template type is not used for submission or assessment. Rather, it is intended to provide information and resources about a group to all of the group's members. Unlike the other types of templates, the Homepage template is tied directly to a group template.

**To create a Template:**

1. Click the Hierarchy button located at the top of the page.
2. On the right side of the page, click the Template tab.
3. Highlight the tier in which the template will be added. To highlight the tier, click on it.
4. Click the Create Template button.

5. In the Title text field, type in a title for the template.
6. Click the Workflow dropdown menu and choose a workflow.
7. Click the Next button.

The Template Page
The process of building a template takes place on the template page. The template page is divided into four main sections: the **banner menu** area, the **component** area, the **page layout** area, and the **assessment panel**.
The Banner Menu

The banner menu has four tabs, each of which effects the template as a whole.

- The Add Content tab: This tab provides tools for the construction of a template.
- The Choose Theme tab: This tab allows the template’s look to be changed using themes.
- The Settings tab: This tab provides settings for changing visibility to members, and converting the template to a showcase.
- The Preview tab: This tab displays the template as it will appear to submitters.

The Component Area

The component area provides several different tools, or components, that can be added to the content area of a template. Each component has different capabilities.

Resource Components:

Resource components are tools for giving or displaying resources to submitters of the template. Submitters cannot edit or delete these components.

- **Title**: Text box with large type
- **Text**: Text box with small type
- **Multimedia**: Include an image or embedded YouTube video
- **Attachment**: Include external files for download
Input Components:
Input components are tools provided to submitters for putting their own content into the template.

• **Text Area:** Text box in which submitters can type
• **Attachment:** Provides the ability to attach external files
• **Rich:** Text box in which submitters can type, insert images or web links, and use formatting tools such as text alignment and color
• **YouTube:** URL [web address] text field for submitters to include a video from YouTube into an embedded player

Question Components:
Question components allow the template to ask questions of the submitter, and provide various methods for selecting answers.

• **Radio Button:** Submitters answer a multiple choice question by selecting a circular button next to the answer. Submitters must choose only one answer.
• **Dropdown:** Submitters answer a multiple choice question by selecting the answer from a dropdown menu. Submitters must choose only one answer.
• **Checkbox:** Submitters answer a multiple choice question by selecting a checkbox next to an answer. Submitters can choose more than one answer.

Reference Components:
Reference components allow submitters to include information contained within their Via accounts.

• **Portfolio Reference:** Inserts an event from from the submitter's portfolio
• **Gallery:** Inserts an entry from the submitter’s Timeline, and presents the entry as a "card."
• **Timeline:** Inserts an entry from the submitter’s Timeline, and presents the entry with a date stamp.
• **My Info:** Inserts a pre-made widget containing a submitter’s via™ information, such as name, gender, and email address, as well as the submitter's avatar picture.

Assessment Components:
Assessment components provide tools for completing an assessment. Although assessment is typically performed ON a group member, BY a group owner, these components can optionally be assigned to any role in a group.

• **Scoring:** Provides a scoring box, with a max number of points assigned.
• **Rubric:** Adds a rubric from the rubric list (rubrics are listed on the Rubrics tab of the group owner’s landing page)

*The Content Area*

The content area of the template page consists of page sections, which can be added and deleted to control the look of the template. Then, components are added to the sections. Sections can be added in several pre-made layouts.

**To add template sections:**

1. Click on a section below which new sections will be added. A selected section will have a blue outline around it.
2. Click on the blue *add sections* button.

3. Click on a new section layout to add sections.

**To delete template sections:**
1. Click on a section to be deleted.
2. Click the delete section button [trash can icon].

To add components to a template section:

1. Click a section to which a component will be added.
2. Click on the component to be added.
3. If necessary, complete the component details popup, such as giving the component a label or whether or not it is optional, and click the popup’s Save button.

To delete a component from a template section:

1. Hover over the component to be deleted.
2. Click the delete button [trash can icon].
3. In the Are you sure? popup, click Delete.
To move a component to a different location:

1. Hover over the component to be moved.
2. Click and hold on the move button [crosshair icon].
3. While holding, drag the component to the new location.

The Assessment Panel
The assessment panel area of the template page provides space for adding a rubric, scoring box, and feedback text box to a template. Like the Scoring and Rubric components, placing these items in the assessment panel area establishes a visual separation between submitted work and assessment tools during the assessment process.

To add rubrics, a scoring box, or feedback box to the assessment panel:

1. In the assessment panel area, click the add item button [plus icon].
2. Click Rubric, Scoring, or Feedback from the menu.
3. Complete the item details popup, and click the popup's **Save** button.

**Saving a Completed Template**

While building a template, via automatically saves progress once every minute. However, the template can be saved at any time by clicking the **SAVE** button on the template page.

To edit an existing template:

1. Click the "Hierarchy" button located at the top of the page.
2. On the right side of the page, click the **Template** tab.
3. Highlight the tier in which the template is located. To highlight the tier, click on it.
4. In the template list, click the title of the template that will be edited.
5. Edit the template.
6. Click the **Save** button.

**Activities**

Activities can be thought of as assignments. An activity is the component that allows the distribution of a template to a group. Activities define the template to be completed by submitters, as well as the date and time the submission will be due, and whether the submission is required.
Group owners can create activities within their groups. Likewise, administrators can also create activities within a group. However, administrators can also distribute an activity to multiple groups, even if those groups have different group owners. This is especially useful when the same rubric will be used for assessment across several courses, or when completion of the same template will be required of submitters who are in different groups.

To create an activity within a single group:

1. Click the Hierarchy button located at the top of the page.
2. On the right side of the page, click the Group Template tab.
3. Highlight the tier in which the group template containing the desired group is located. To highlight the tier, click on it.
4. In the group template list, click the title of the group template containing the desired group.
5. From the group list, locate the group in which an activity will be created.
6. Click the Create Activity icon [paper airplane icon] for the desired group.
7. A list of any existing activities for the group will be listed.
8. Click the **Create Activity** button.

9. Type a title for the Activity in the Title text field.
10. Click the Template dropdown menu to choose a template to be completed by group members.

**TIP:** The chosen template can be previewed by clicking the Detail button next to the dropdown menu.

11. Click the Submitter dropdown menu to choose the member role that will submit work to the activity.
12. Click the Visible field to choose a date and time that the activity will become viewable to group members.
13. Click the Open for submission field to choose the earliest date and time that members will be able to submit to the activity.
14. Click the Due field to choose a date and time that the activity will be due.
15. Click the This activity is required checkbox if members are required to complete the activity.
16. Click the Grade will be sent to LMS/CMS grade book checkbox if the activity is integrated with a Learning Management System.
17. Click the **Save** button to save current settings, and continue building the activity at a later date.

OR...

18. Click the **Publish** button to distribute the activity to group members.
To create and distribute an activity to multiple courses:

1. Click the **Hierarchy** button located at the top of the page.
2. On the right side of the page, click the **Template** tab.
3. Highlight the tier which contains the template to be included in the activity. To highlight the tier, click on it.
4. From the template list, hover the pointer over the template to be included.
5. Click the **Create Activity** button [the paper airplane icon] that appears on the far right end of the template listing.
6. In the Title text field, type in a name for the activity.
7. Click in the Groups text field. A list of a group within the selected tier will display.
8. Click the plus sign next to each group to which the activity will be distributed.

NOTE: The groups available are based on the tier selected in step 3. Only groups that are within that tier, or within a contained tier, will be available.
9. For each group, choose a submitter type from the dropdown menu.
10. In the Visible field, choose a date and time that submitters will first be able to see the activity.
11. In the Open for Submission field, choose a date and time that submitters will first be able to submit the completed activity.
12. In the Due field, choose a date and time that the activity will be due.
13. If the submitters will be required to submit the activity, click the This activity is required checkbox.
14. When all selections have been made, click the Publish button in the top right corner.

NOTE: Click the Save as Draft button to save the activity setup, but not make the activity available for submission or assessment.

Getting Help

The Help Center
The Help Center provides user guides and resources for via. Additionally, LiveText hosts regular training webinars to discuss and demonstrate how to use via. A list of webinars and registration links can also be found in the Administrator and Group Owner User guides. [See below]
To access the Help Center:
15. Log into Via.
16. Click the account name in the upper right corner.
17. From the dropdown menu, select Help Center.