

Training course providers

Summary

This guide addresses how training course providers can use LockLizard controls to simplify the creation of training course materials, and makes some suggestions about how to simplify your administration for delivering courses direct to end customers or to instructors.

Introduction

For most organizations, a training course is made up from a number of different documents, including:

- lecture slides;
- student notes;
- instructor notes;
- audio/visual material;
- self-assessment forms;
- instructor assessment forms;
- student evaluation tests.

Also, each course may be broken into modules of about 1 hour of presentational material, and a course may last from half a day to a week, depending on the requirement.

Courses may be tutor-led, or they may be self-study units which are either used at the student's discretion or each module is issued on satisfactory completion of the previous module.

In each case some of the material(s) require DRM protection, and others may be copied or printed because they do not represent the intellectual capital of the training organization. So student notes might be freely printed and distributed, because without the course slides they have little value, and the various assessment forms can probably be freely copied, but the slides and tests and perhaps the instructor notes do need protection.

Structuring courses for LockLizard Admin

The protection features in Safeguard/Enterprise may be readily configured to create the blend of security functionality for these requirements.

Each training course can be created as a unique Publication. This may be the course title or it could be an internal part number.

All the documents that need protecting are protected into the publication using the Writer application. Each document can have its specific protection profile and still be part of the publication. The documents can have descriptive titles, but the file names would be internal document references. In preparing a documentary pack for the course there is no reason not to bring together all the documents into a group (or folder with the name or identifier of the course), whether they are all protected or not, simply to make it easier to manage the content of the course. Since the documents are all part of a publication, once one document has been opened by the user, the others will open automatically (unless you have set license checks – see later).

Choosing start and end dates

There are start and end dates for both documents and customers. Some of these can be varied after the initial setup, but it is more efficient to set these as early as possible.

You can choose to have documents cease a set number of days after first opening, or after a specific number of views. This may work where you have courses that must be completed in a period of time (education courses are fixed by terms or semesters; it may be a requirement that a module is completed within a month of the start; some documents, like a student test, have to be completed within two or three sittings). In other situations there may be a fixed end date that the course is available until, such as the end of this year because that is the scheduled revision date.

How often to verify document access rights

This control needs some thinking about. If you say check every time (or you insist on monitoring accesses or printing) the user has to be online when they open the document. This can be bad news if someone is travelling, or if they are on the beach (California?) or simply not at a WiFi hotspot. Typically, trainers work on customer premises where they do not have Internet access because they are not part of the local network.

So look carefully at the use case model for what you are selling. Choosing to check too frequently can create problems for your customers or trainers. On the other hand, if there is never a license check you can never revoke access.

Remember that license check requirements can interact. You can set a document to check its license every 90 days, but have it monitor prints. So the document can be used offline as long as the user does not try to print it, when they have to be online.

As a general point, if you are using a mixture of controls do set the expectations of your customers correctly. They need to know what they are expected to do to use your documents or they will be unhappy.

To print or not to print

Allowing printed copies when it does not affect your IPR is not normally a problem. LockLizard provide a sophisticated number of watermarking controls, but you have to choose a balance between what should deter users from distributing copies of the printout and what creates a good brand image for you on the printout. That is artistic judgment, and may vary from document to document.

Many people allow limited printing for personal use, but put a watermark on identifying who the user is (after all, it's their personal copy). But remember to set the color of the watermark text to be the same as your main text color, otherwise the watermark can be easily removed by a graphics package. Also, use a very narrow font (not one of the standard Windows fonts) in a large size so that it is less likely to interfere with reading the text, but is much more difficult to remove by manual editing.

If you want to use graphics watermarks, consider how invasive they may be. Classically, watermarks were used to prove authenticity (of banknotes) so their effect on readability was not so important. But a heavy background may make your documents visually poor but has the advantage that OCR packages will not be able to read and reproduce the text. At the other extreme, if a watermark is too light, a scanning package can be set to high contrast so it will ignore the watermark. Either way, you will need a bit of experimentation to find out what is going to work for you.

Forcing a specific format for viewing

Typically for training courses you will want to set the course slides to open in full screen mode. This is probably because you have a house style and presentation style that is integral with your branding. You may wish to set documents to open in that way. You may wish to force that style at all times, or you may wish to let the user/trainer choose the presentation style that best suits them once a document is open.