

Card Authors Guide

Pract.us Basics for Card Authors



This guide helps Card Authors get the most from the Pract.us app. For more detailed help with other Pract.us roles, see these additional guides:

Getting Started

Skill Authors Guide

Mentors Guide

Learners Guide

Managers Guide

Team Admins Guide

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Card Authoring - Before You Begin...

Cards are sets or collections of skills which, when taken as a whole, guide the Learner down a path towards achievement of a larger purpose or goal. Cards help a Learner prepare for a specific role, perform a major activity or function, or even qualify or certify the Learner. Here are some examples:

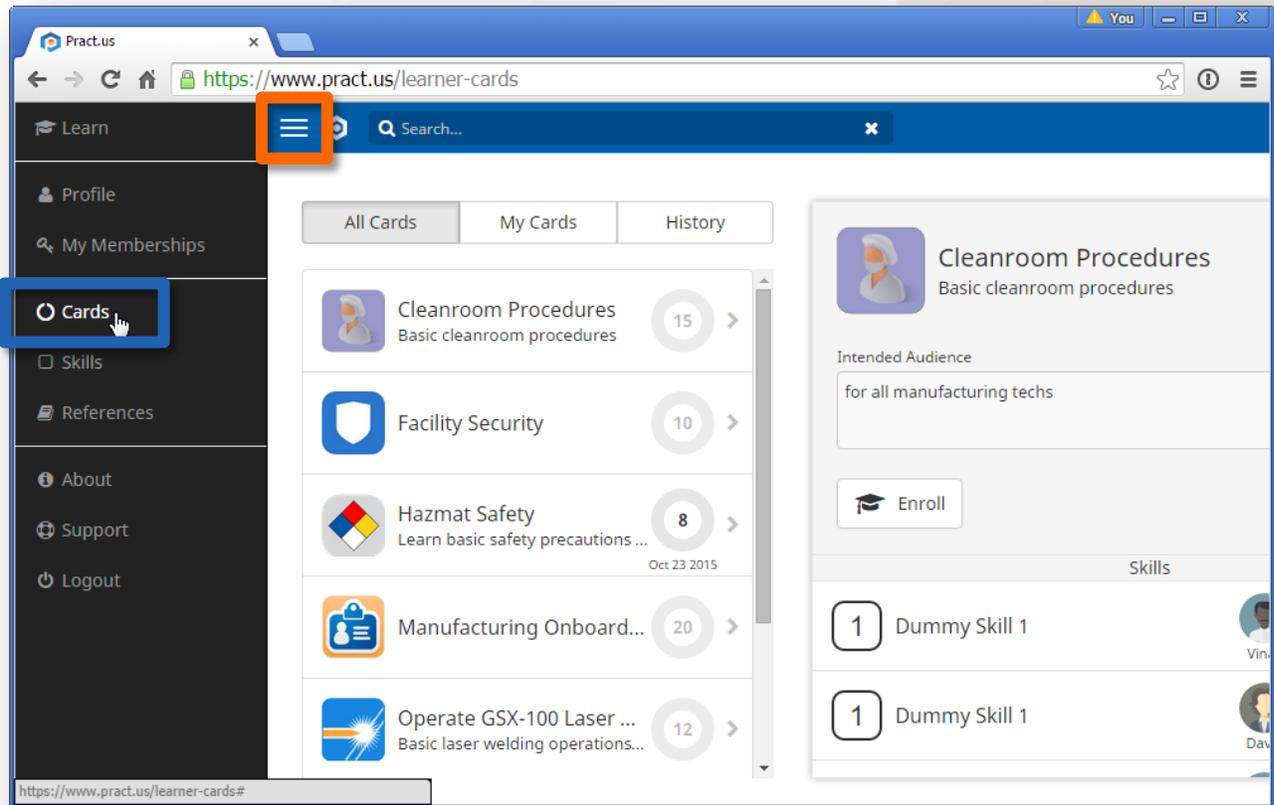
1. Cards can help a Learner prepare for a specific role, such as:
 - a. Assistant Manager

- b. Line Foreman
 - c. Field Technician
2. Cards can help a Learner perform a major activity or function, such as:
 - a. Deliver a sales presentation or demo.
 - b. Review or approve a contract.
 - c. Close the year-end financial accounts.
 3. Cards can qualify, certify, or license the Learner, in areas such as:
 - a. Real estate agent license
 - b. Private pilot license
 - c. Nurse practitioner certification

Creating New Cards

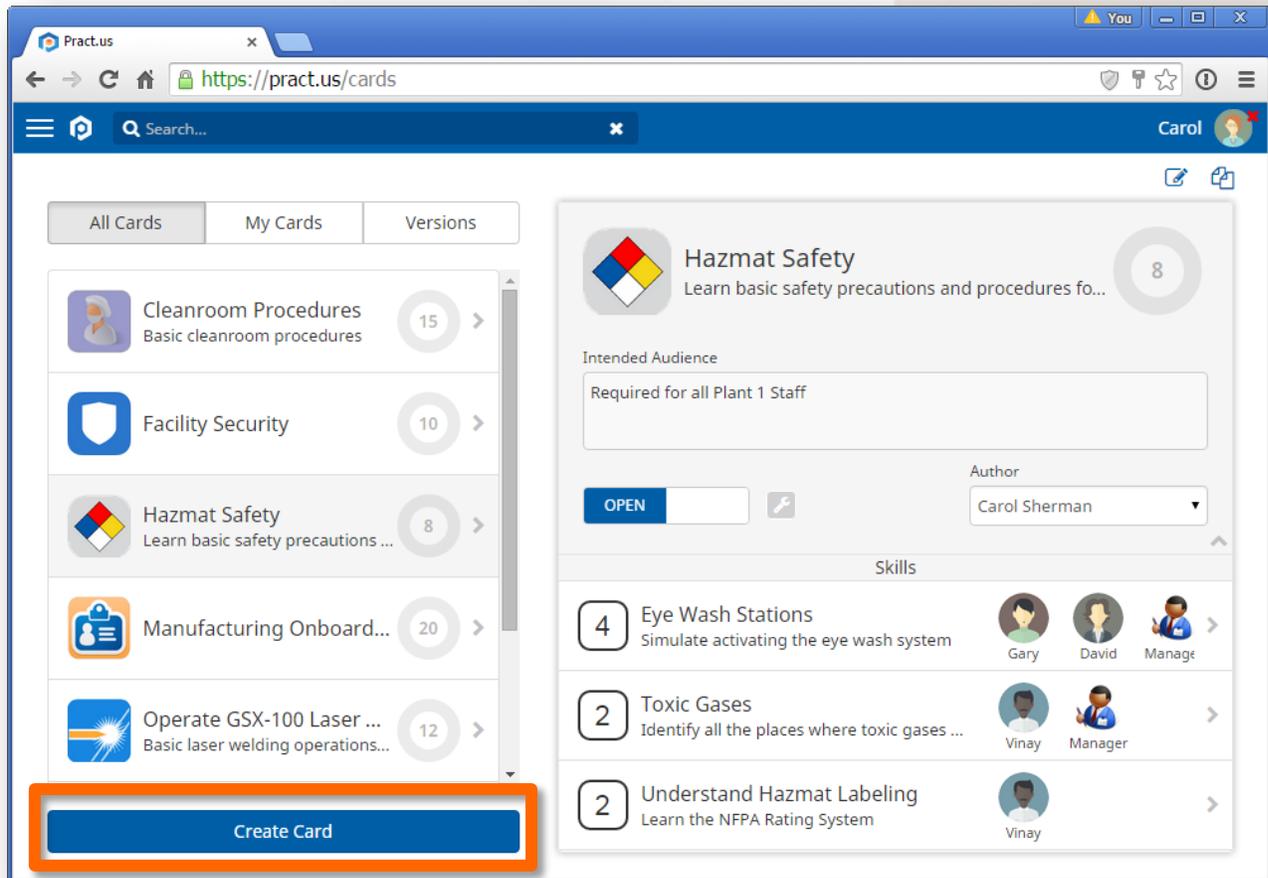
You need to be an Author (have the Author role) before creating a new card. Your Pract.us Team Admin can give you the Author role if you don't already have it.

1. From any view, show the slide-out menu by selecting the  button as shown in the **orange** rectangle below.



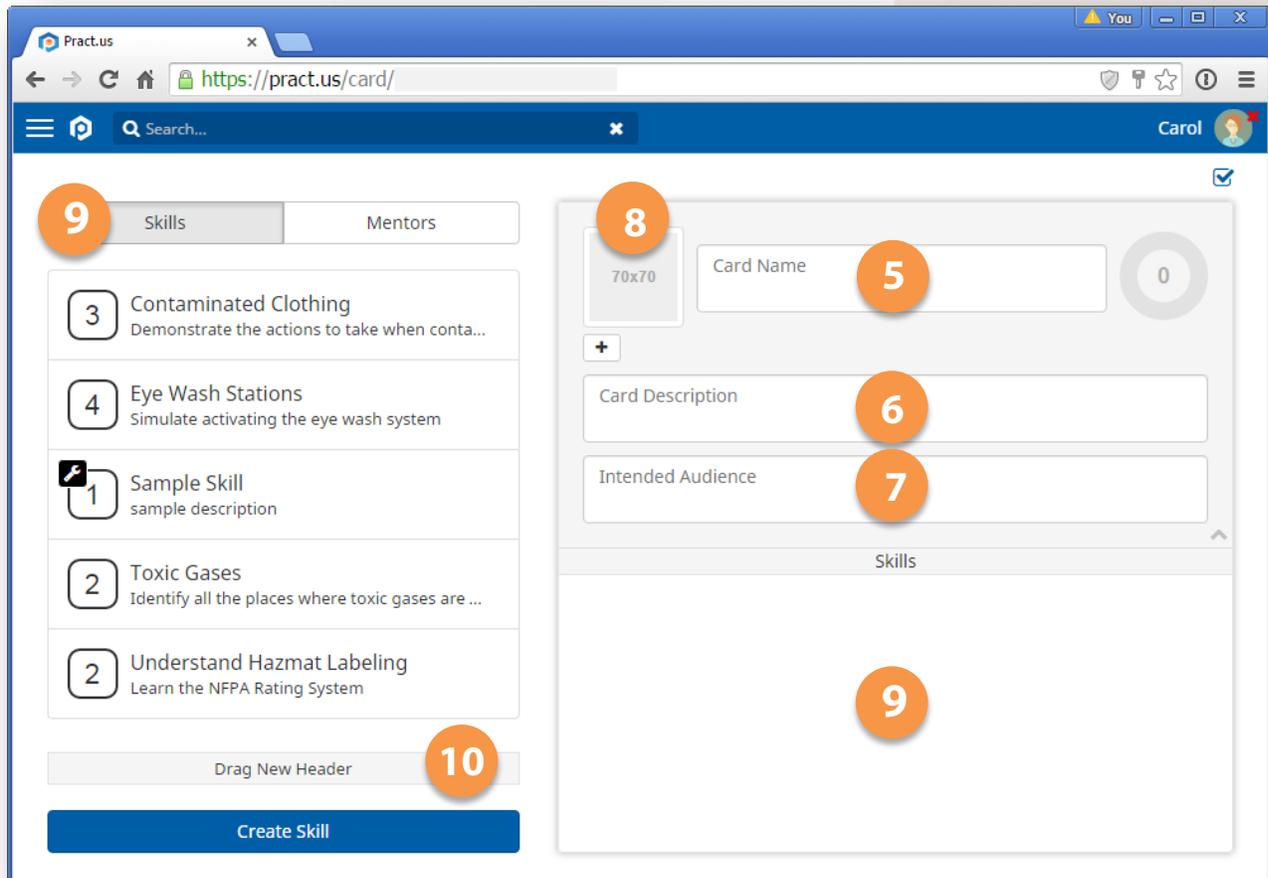
The Card Catalog (Learn view) with slide-out menu visible on the left side

2. Select **Cards** as shown in the **blue** rectangle above. If you don't have the Author role, you won't see this menu option. You should see a view like the following:



The Cards view

3. Select **Create Card** as shown in the **orange** rectangle above.
4. You should see the New Card view below (the numbered **orange** circles are used for reference here - they aren't part of the view):

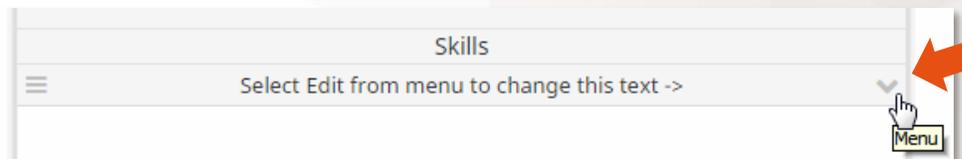


The New Card view

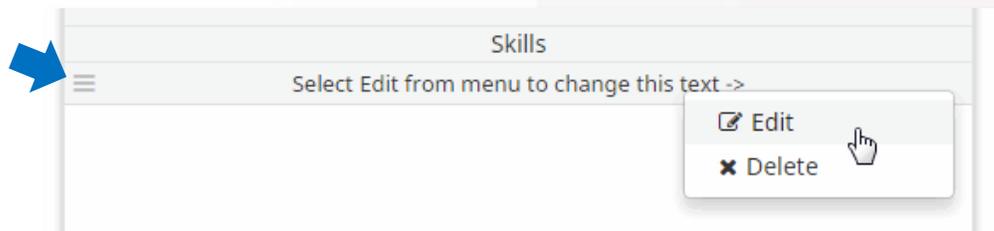
5. Enter a **Card Name**. The card name is the “title” of the card and will be shown in larger letters in all lists so try to keep your card names as concise as possible.
6. Enter a **Card Description**. This is usually just a short elaboration on the card name. The card description will be shown in smaller letters underneath the card name in all lists.
7. Enter **Intended Audience**. This is the type of Learner you want to enroll in the card. Learners and Managers will use this entry to judge whether the card is right for them or their team.
8. Assign an icon or **Badge** using the + button to browse for a graphic file. Graphics will automatically shrink or expand to fill the 70x70 pixels allotted. Graphics with native 70x70 pixels will look best. When choosing a badge graphic, keep in mind that the badge is the official symbol of the card; it will appear on all lists and will become part of the Learner’s portable record of accomplishments.
9. Add skills to the card by dragging skills from the left-hand list to the skills pane of the card. These are the skills that a Learner must complete in order to earn points and eventually finish the card.
 - a. If you want to create a new skill, see the Skill Authors Guide.

- b. You can move skills up or down (re-order) on the card by dragging the skill. Use the Points rounded rectangle as a “handle” while dragging. The other skills and Headers will reposition as you drag the skill up or down in the list.
10. Using **Headers**. Headers are optional dividers that you can use in any way you choose. They are an easy way to organize sets of skills or create skill categories within a card. Headers also make it convenient to add the same Mentors to more than one skill at a time (see the Add Mentors step below). To create a new Header

- a. Drag from the button to the skills pane (drag from **10** to **9** above).
- b. Select the new header or hover your cursor over it until you see the gray “chevron” icon at the far right, as shown by the **orange** arrow below:

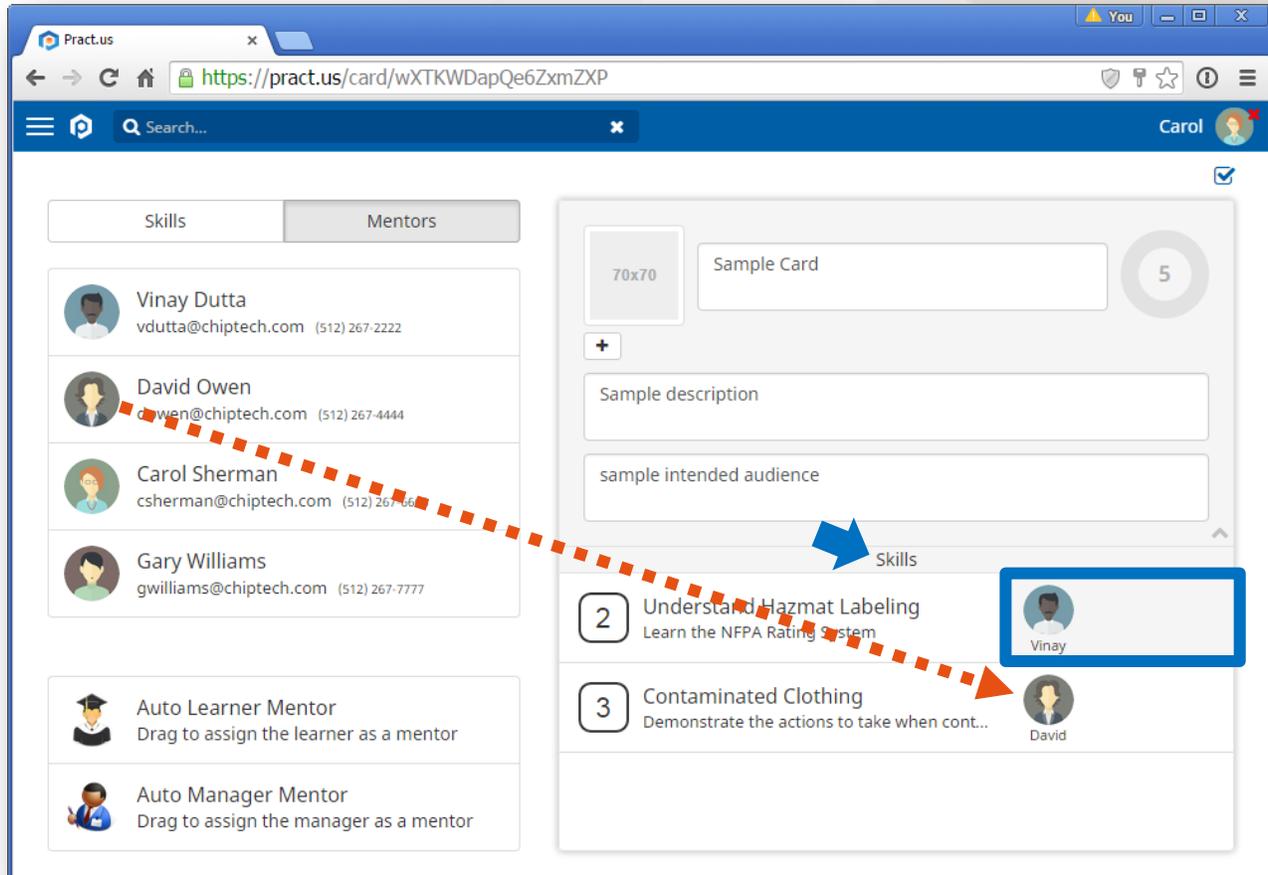


- c. Select the gray chevron to open the menu, and choose **Edit**



- d. The header’s title will highlight and you can type in a title of your own.
- e. To move the header, drag the  handle on the left side of the header (as shown by the **blue** arrow above) and drag it up or down in the list of skills. Skills and other headers will reposition as you drag the header up or down.
11. Adding **Mentors**. Every skill on your card must have at least one Mentor. We recommend having two or more Mentors for each skill so that one sick or vacationing Mentor doesn’t block Learner progress.
- a. Only those with Mentor roles in this Field will appear in the Mentor list on the left. If there’s someone you feel has the right experience to be a Mentor but doesn’t have the Mentor role, see your Team Admin to have the Mentor role assigned.
- b. If you include a skill that has Fixed Mentors, then you’ll see those Mentors in a gray section of the skill (**blue** rectangle below). Fixed Mentors are the skill Author’s way of “locking” or “fixing” specific Mentors to the skill. As a card Author, you can’t override Fixed Mentors by removing them or by adding other Mentors to the skill.

- c. If the skills you included do not have Fixed Mentors, then you must add Mentors by dragging them from the left list onto the right side of the skill, as shown by the **orange** dashed arrow below:



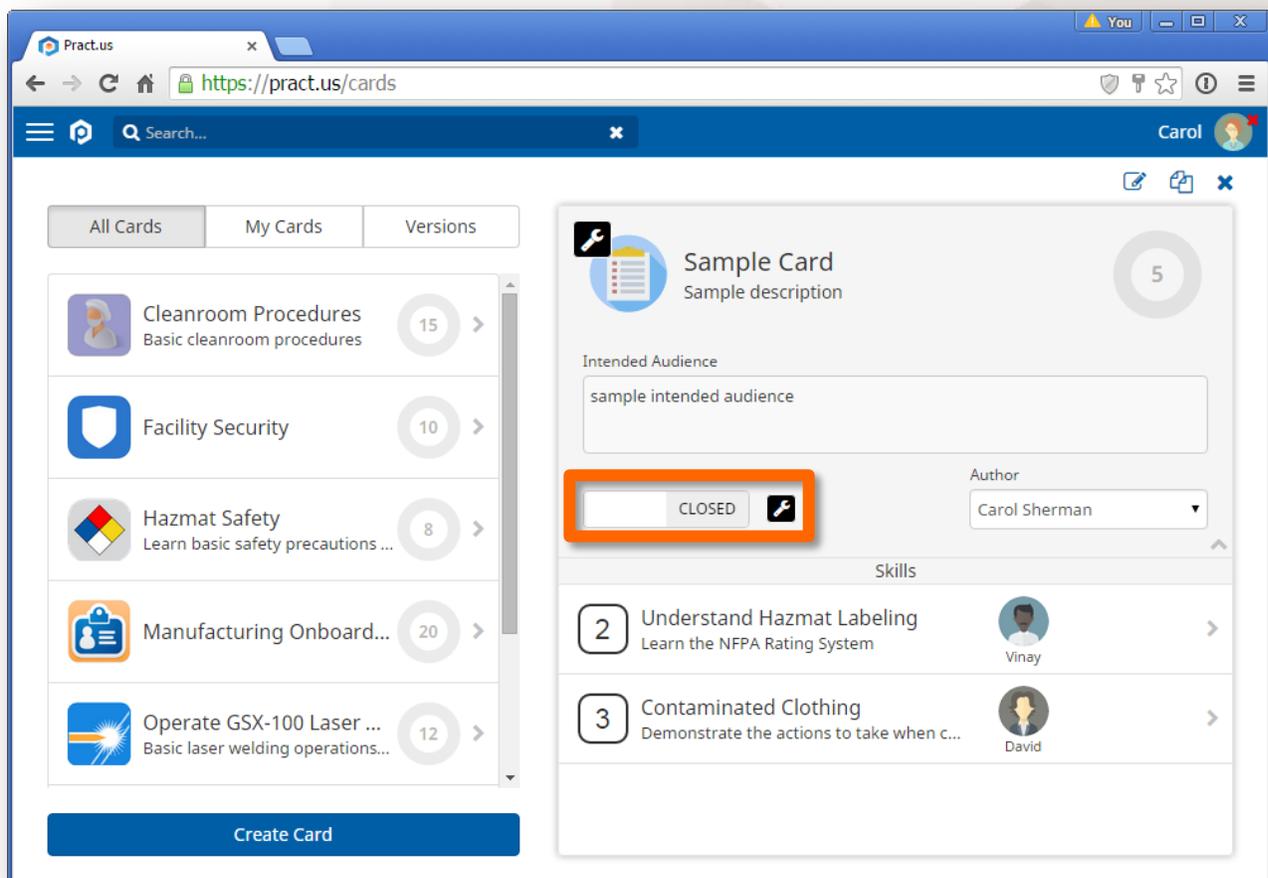
Adding a Mentor to a card

- d. If you drag and drop a Mentor onto the Skills bar (**blue** arrow above), then the Mentor will be added to *every skill on the card* (except those with Fixed Mentors, if any).
- e. If you drag and drop a Mentor onto a Header, then the Mentor will be added to *every skill between that Header and the next Header below it* (except those skills with Fixed Mentors, if any).
- f. To remove a Mentor from a skill, hover near the Mentor's avatar until a small gray icon ✕ appears in the upper-right. Select **Remove Mentor** to remove the Mentor from the List, as shown below:



- g. The order of Mentors in a skill doesn't matter.

- h. There are two special Mentors at the bottom of the left list: **Auto Learner** and **Auto Manager**. These special Mentors, when added to a skill, automatically turn into the enrolling Learner or the Learner's Manager. In other words, if you enroll in this card, then any skill using the Auto Learner becomes a skill you can sign off yourself - *you turn into the Mentor!* And your Manager becomes the Mentor in any skill that uses Auto Manager.
12. To save your new card, select **Save** in the upper right corner of the app window. Your card view re-appears:



A new card as it appears right after saving

13. All newly created cards are initially **closed**. You, as the card's Author, must manually **open** the card to make it available for enrollments.
14. Open and closed status is indicated by the position of the open/closed switch and the **black** wrench icon, shown above in the **orange** rectangle. Only Authors will see this switch and only for *their* cards.

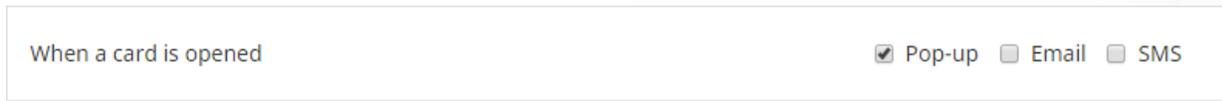
this card is open >



this card is closed >



15. To flip the switch, either touch or click it. You should see the switch change to the other position.
16. While closed, the  icon is also attached to the card banner and the list of cards on the left. While your card is closed, you can add any skill to it, including closed skills and skills made by other Authors. But the card itself can't be opened until all the skills on the card are also open.
17. You can leave the card closed for as long as you like. This can be useful when building the card or making changes over a period of time. But keep in mind that Learners can't enroll in your card until you open it. So don't leave your cards closed longer than necessary.
18. When you're ready to open your card, flip the open/close switch as shown above.
19. A card can't be opened until all of the following conditions are met:
 - a. The card has a name
 - b. The card has at least one skill
 - c. All skills on the card are open
 - d. Every skill on the card has at least one Mentor
20. When a card is opened, notifications are sent to anyone who requests it. To request notification when cards open, go to your Profile and select **Notifications**. Then select the type of message you'd like to receive:



When a card is opened Pop-up Email SMS

This notification will let you know anytime a card opens

Editing Cards & Card Versions

Pract.us keeps track of changes you make to your cards and automatically assigns version numbers to them. This is handled "behind the scenes" so you won't need to worry about the complexities of version numbers. But because versions are tracked, your Team will always be able to determine which Learners completed which versions of cards and skills. This ensures long-term integrity and accountability in the system.

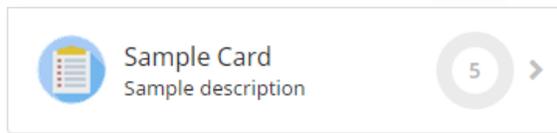
There is a special type of card change that does not trigger a new version - changing Mentors. Because the members of a Pract.us Field and Team may change frequently, both their names and their roles, it may also be necessary to update the Mentor assignments in a card frequently. To make Mentor changes as easy and low-impact as possible, we don't require you to close a card first before changing, adding, or removing Mentors.

When it comes to Mentors, what really matters for purposes of record-keeping is which Mentor actually signed off a Learner's skill. Pract.us keeps permanent records of all sign-offs, including which Mentor did

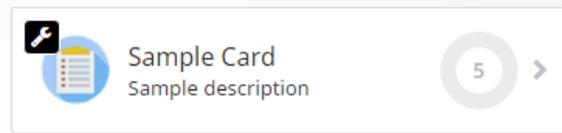
the signing off. And the record of an existing sign-off will never change, even if an Author replaces the Mentor later on for new card enrollments. It's less important which Mentors *could have* signed off a skill, so that information isn't tracked in card versions.

For all other types of card changes, such as name, description, badge, skills list, skills order, headers, or changes to any skill in the card, follow these steps:

1. To edit a card, you must first close it. Closing a card takes it "offline" for maintenance and immediately prevents any new enrollments by Learners. Only the Author who owns the card can close it.
 - a. Open and closed status is indicated by the position of the open/closed switch and the black wrench icon.
 - b. While a card is closed, the card's Author can **Edit**  or **Retire** it .
 - c. While a card is either open or closed, any Author may **Clone** it  to create a starting point for their own work. If you clone another Author's card, you own the new copy.
 - d. While a card is closed, no Learners can enroll in it.
 - e. An open card is visible in the card catalog of all Learners and is available for enrollment.



This is an open card



This is a closed card

- f. A closed card is still listed in the card catalog for all Learners to review and browse. But the card is not available for enrollment while it is closed.
- g. The moment a card is closed, a new version is created if and only if any enrollment has ever occurred for the card's current version. This includes active, cancelled, or completed enrollments. This ensures that Pract.us keeps track of all card and skill changes between enrollments. But if there *haven't been any* enrollments since the last change, then Pract.us will not create a new version. A new version, if created, becomes effective as soon as the card is re-opened.
 - Example 1: An open card is currently at version 2. One Learner is currently enrolled in the card and is working on it. Now, the card's Author closes the card in order to edit it. Because one enrollment in version 2 already exists, Pract.us immediately bumps the card version to 3 as soon as the Author closes it.
 - Example 2: An open card is currently at version 2. Some Learners have completed cards of this version, but none are active. Now, the card's Author closes the card in order to edit it.

Because at least one enrollment in version 2 has occurred, even though none are still active, Pract.us immediately bumps the card version to 3 as soon as the Author closes it.

- Example 3: An open card is at version 2 but no Learners have ever enrolled in the card while it was at this version - no active, cancelled, or completed enrollments. Now, the card's Author closes it in order to edit it. Because there were no enrollments in version 2, Pract.us does not bump the card version when closed. When the Author finishes editing and re-opens the card, it remains at version 2.

h. When a card is closed, it is automatically updated or "upgraded" with the current versions of all included skills. If a current version of a skill is closed, then the updated card cannot be re-opened until the skill re-opens. This ensures that if you're using another Author's skills on your card, that you can't open your card before all its skills are open, too.

2. Once the card is closed, select the **Edit** button  in the upper right corner to begin editing.
3. Make any changes to your card. You can change anything on the card, including skills, Mentors, badge, etc. As explained above, it's not necessary to close the card if the only change you make is to the Mentors.
4. Once all changes have been made, select the **Save** button  in the upper right corner.
5. You can leave the card closed for as long as you like. This can be useful when making changes over a period of time. But keep in mind that no new enrollments can occur until your card re-opens. Keeping it closed essentially keeps it "out of circulation".
6. Once your changes are complete, open the card. This makes your card available to Learners for enrollment again. In order to be opened, cards must comply with the following rules:
 - a. The card must have a Name.
 - b. The card must have at least one skill.
 - c. Every skill on the card must have at least one Mentor.
 - d. Every skill on the card must be open.
7. When a card is re-opened, notifications are sent to all who request it.

Editing Cards while Learners are Enrolled

1. Once a Learner has requested enrollment in a card, the version of that card is "frozen" for that Learner. Once a Learner has started a card, the only thing that can change about the card is the list of Mentors who can sign off the skills. Pract.us does not allow any other changes to be made to cards that are already in progress. Any changes an Author makes to a card (except Mentors) only take effect for the *next* Learner who enrolls. This means:
 - a. If a card Author changes a card, the changes do not affect any cards already started by Learners.

- b. When Learners enroll in cards, they can be confident that they aren't trying to hit moving targets. The card's objectives (signing off a defined set of skills) never change once enrollment starts.
 - c. When Managers approve card enrollments, they can be confident that the assigned completion dates do not need to be re-evaluated because the card's contents changed.
2. A new card is considered "started" the moment the Learner requests to enroll (in other words, even before the request is approved by the Manager).
 3. Even if the card is later closed by its Author, any Learner currently working on it will be able to continue working on it. Enrolled Learners will not see the closed version with the **black** wrench . As each Learner completes or cancels that card, it will reappear in the catalog list as the latest version. If the latest version is closed, it will show the **black** wrench . The key point is that anyone working on a card will be able to continue working on a stable card regardless of any changes an Author is making.
 4. In summary, here are the two general rules of card editing:
 - a. Mentor changes are not versioned and take effect immediately for all cards *including those with existing enrollments*.
 - b. All other changes are versioned and only take effect once the card is open and a Learner starts a new enrollment. These card changes are never applied retroactively to existing enrollments.

Handling Missing Mentors

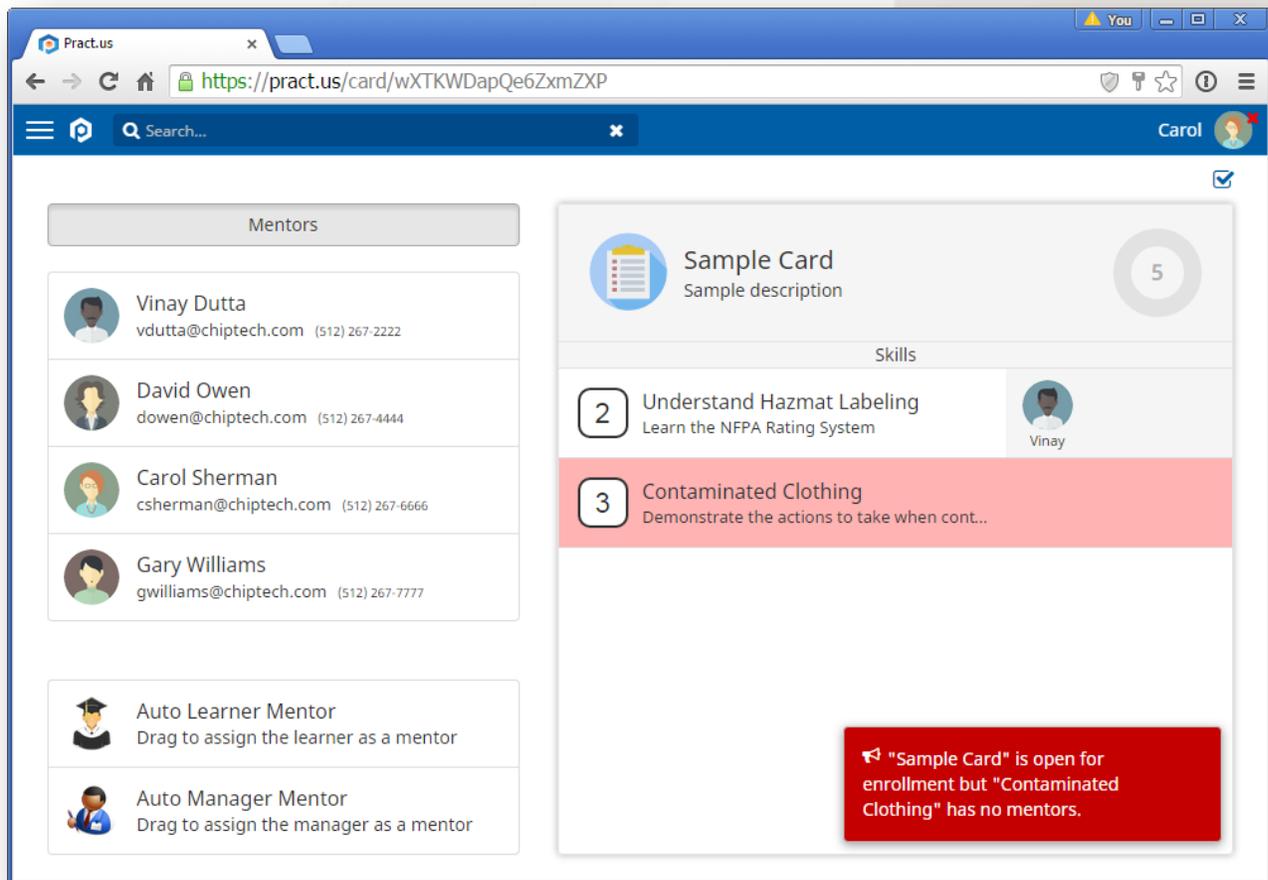
The section above discusses how Pract.us handles changes you make to the Mentors on a card. But what happens when Mentors change for some other reason? Changes in an organization may cause some members to change jobs, get promoted, or even leave altogether. What happens when a member with Mentor role leaves the Team? What happens to the cards and skills she was a part of?

The loss of a Mentor can have serious consequences for the Learners. In the worst case, a skill may suddenly have no Mentors assigned! That means a Learners may not be able to get skills signed off and or complete their cards on time.

A Mentor can disappear from a card or skill for several reasons:

- The Mentor leaves the Field or Team
- A Team Admin removes the Mentor's role in the Field
- An Author removes the Mentor from a card or skill

If any of these events occur, leaving any skill on any open card with no Mentors, then all affected skills are shaded in pink, like this:



The screenshot shows a browser window with the URL <https://pract.us/card/wXTKWDapQe6ZxmZXP>. The interface includes a search bar, a user profile for 'Carol', and a 'Mentors' list on the left. The main content area displays a 'Sample Card' with a progress indicator of 5. Below the card, a list of skills is shown. The skill 'Contaminated Clothing' (Skill 3) is highlighted in pink. A red notification box at the bottom right contains the text: "Sample Card" is open for enrollment but "Contaminated Clothing" has no mentors.

The skill shaded in pink has no mentors!

This is such a serious problem that Pract.us notifies *almost* everyone in the Field:

- The Authors of the cards affected are notified because they'll need to add a replacement Mentor asap.
- The Authors of the skills affected are notified, if the missing Mentor was part of any Fixed Mentor Lists, because they'll need to add a replacement Mentor asap.
- The Learners who have active enrollments in the affected cards are notified because it affects their ability to get sign-off for the affected skill.
- The Managers of Learners who have active enrollments in the affected cards are notified because it might impede their progress and delay completion date.
- The Team Admins are notified because they may need to get involved rapidly to solve the problem if the Authors who own the affected cards or skills are unavailable. To ensure that missing Mentors are addressed as quickly as possible, Team Admins can also choose to receive a periodic Missing Mentor summary report by going to **My Reports** in their Profile.

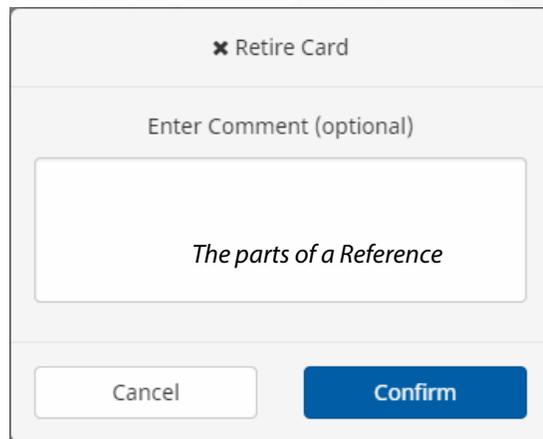
In order to minimize this problem as much as possible, we recommend Authors always add at least two Mentors to every skill.

Cards with missing Mentors will remain open in the card catalog and Learners will continue to be able to start new enrollments even though, at the moment of enrollment, it may not be possible to complete the card. Because skills with no Mentors are shaded pink, all enrolling Learners will see the problem. And because we expect that the problem will be corrected quickly, new Learners may assume it won't have much effect on them. If a Learner or Manager isn't comfortable with the missing Mentor issue, however, they may always decide to delay enrollment until it's fixed.

Once a new Mentor has been added to the skill, then Pract.us will detect that the missing Mentor problem has been solved, and notifications will be sent to the same roles as listed above.

Retiring Cards

1. Cards can be "retired" so that they are no longer available for enrollment or editing.
2. Cards can only be retired while they are closed.
3. To retire a card, close it, then select the **X** button from the upper right corner. You will be asked to confirm the retirement and enter an optional comment to document your reason, as shown below:



The Card Retirement Confirmation window

Getting Help

- For more help using Pract.us, see our Support Site: support.pract.us.
- You can also email us at support@pract.us