EP E-LEARNING TOOL

MANUAL and FAQs

Version 3

November 2021

FOR EPFIs INTERNAL USE ONLY

Contents

The Equator Principles e-learning tool consists of three parts:

- **Module 1:** explores the relationship between the Principles and the natural order of how they are applied across a project cycle framed; introduces and explains the process of project categorization; covers the different due diligence requirements for particular issues and risks, Independent Monitoring and Reporting, and what to expected from clients and EPFIs with respect to reporting.
- Module 2: Learners are placed inside a fictional case study, where the managers and their executive are executing a complex deal that changes scale as time moves on. They encounter challenges that the learner is asked to apply the EP framework to and then see the results of their decision-making.
- **Executive Summary:** Based on previous feedback, we have also produced a shorter version of the tool, which could be shared with other business lines not as directly involved in EP.

Installation

Th tool is available in three formats:
1. Learning Management System (LMS) with score reporting
2. LMS with no reporting and no scores
3. Non LMS – with scoring

Due to concerns in some jurisdictions regarding the recording of score data, there are two LMS versions offered - the 'REPORTING' version has score and answer data available for reporting to an LMS, the 'NO REPORTING' version has this switched off.

Learning Management System (LMS) versions (format 1 and 2)
These will need to be uploaded into the EPFI's Learning Management System by a suitably qualified person. They can download the appropriate ZIP file via the links below.

Non Learning Management System (Non-LMS) version (format 3)
Individual users can download the appropriate ZIP file via the links below and extract it to a safe place on your hard drive - keeping all the components within the resulting unzipped folder.
Please note that double-clicking the ZIP file will probably just open it - you need to UNZIP/EXTRACT the files to make the tool work. On a Windows computer, right-click the ZIP file and select 'Extract All'.

Links to the tool

Option 1: from the [e-Learning Tool folder on Intralinks](#)
Capacity Building and Training > 02 e-Learning tool, Guidance Documents & Case Studies > 00 e-Learning Tool > EP e-Learning Tool Version 3.

Option 2: From https://www.limetools.biz/epa-elearning-download-nov-2021
Please note: There are two options for downloading from this webpage – via Dropbox or a dedicated file download site.

Note that the files are large and may take some time to download (Executive Summary ZIP file – 104 MB, Module 1 ZIP file – 210 MB, Module 2 ZIP file – 176 MB).

Getting Started

LMS Versions
The method for initiating each module will depend on which LMS is being used, so each EPFI will have to provide their users with appropriate instructions.

Non LMS Version
After downloading and unzipping as per instructions above
   1. **To start either module open the appropriate folder and double click the 'Index' icon, or open with Explorer / Chrome/ Firefox (Windows) or Safari (MAC).**
   2. Once started, for best results follow the on-screen instruction and make your browser full screen.

IT specifications and requirements

Screen resolution: Both modules were designed at FULL HD resolution (1920 by 1080 pixels) but are scalable down to all smaller screen resolutions.

Hardware and software recommendations: The following recommendations should be used only as guidelines for optimum performance – the modules are designed to be viewed on most modern machines.
   – **MICROPROCESSOR:** 1GHz or faster Intel Pentium 4, Intel Centrino, Intel Xeon, or Intel Core Duo (or compatible) processor (Windows), Multicore Intel processor (MAC)
   – **RAM:** 2GB Minimum
   – **MEDIA PLAYER:** N/A - the HTML5 video uses each browser's own media player (see browser spec below)
   – **PLUG-INS:** N/A

Browser recommendations: If possible, always use the latest versions available as HTML5 handling is constantly improving.
Information below indicates the oldest versions recommended for optimum performance
   – Microsoft Edge: Version 12 and newer.
   – Internet Explorer: Version 11 and newer
   – Google Chrome: Version 40 and newer
   – Mozilla Firefox: Version 45 and newer
   – Safari (MAC only): 9.0 and newer

__Some tips__

Here are some tips to help your learning run smoothly:
1. Green text within the tool denotes an action or a link.
2. An asterisk (*) after a word or phrase indicates a pop-up definition – hover your cursor over the preceding word or phrase to get the pop-up.
3. Audio is used at certain points during both modules so please make sure you have audio playback facility on your machine.
4. Enter your name in the space provided as this will re-appear later in the module.
5. Hover your cursor over a video to access the video playback controls – there is a 'full-screen' icon to the bottom right of this control.
6. All videos are embedded within the SCORM with an optional VIMEO URL that can be copied and pasted into a separate browser window, should users wish to view higher quality videos on the Vimeo Channel. The videos are also downloadable in Intralinks folder and on the download page in case neither the embedded nor Vimeo works.
7. You will need to complete a quiz to keep going – click an answer choice then the submit button to get a pop up answer, then click next to move on.
8. Clicking 'Refresh' or your F5 button (Windows) will restart the tool from the beginning – so be careful not to do this unless you want to start again.
9. You can go back to previous pages using the navigation bar (⬅) on most of the pages or use pop-up Table of Contents. At certain points within the tool, the navigation bar for go to the next page (➡) will be hidden until all required actions on the page have been completed.
10. In Module 1, Principles text can be re-displayed if user clicks on any of the Principles on left of screen.

Since the first EP e-Learning tool was launched in March 2017, EPFIs have used it to train thousands of individuals and feedback from their experience has been compiled and analysed.

The Capacity Building & Training Working Group (CB&T WG) has overseen a number of priority updates to make the tool meet the requirements of the EP implementation and more user-friendly and compatible. The CB&T WG sincerely hopes that all EPFIs benefit from the tool. Any feedback from users is very much appreciated, to help the Association better improve the content and technical aspects of the tool.

Please share any comments with [Hanying Li](#) from the EP Secretariat.

FAQ's

General
What's new in version 3?
Considering some EPFIs may want to include the Tool in their trainings, an Executive Summary is developed and added in Version 3, which is a shorter version of Module 1 plus Module 2. More importantly, Version 3 reflects all changes from EPIII to EP4.

How long does it take to complete the course?
Executive Summary takes approximately 1.5 hours, Module 1 takes approximately 2-3 hours, and Module 2 takes approximately 1.5-2 hours.

Support
Who do I contact for help?
If you do have any issues with download or have any other questions regarding the e-Learning tool not answered by this document, please contact:
Hanying LI (Ms), EP Secretariat
Email: hanying.li@equator-principles.com
Telephone: +86 13693012709 (Beijing / UTC+8)

A screen sharing tutorial may be set up when necessary, and other support sessions such as webinars may be organized based on level of demand.

Can an EPFI contact the developer directly?
Hanying Li from the EP Secretariat is the first point of contact for EPFI queries on the e-Learning tool. Hanying will liaise with the tool developer (LiMETOOLS) in regards to all technical queries, as necessary.

In exceptional circumstances, if a resolution may not be found, an EPFI's IT staff may be put in touch with LiMETOOLS. However, please note that such support may not be covered by the EP Association's technical support agreement, and needs to be discussed and agreed on a case-by-case basis.

IT requirements
What software does the tool use?
The tool itself is an HTML5 file so is designed to be viewed within an internet browser and has been tested on Google Chrome, MS Internet Explorer and Mozilla Firefox for Windows computers, and Safari on MAC.
Please note that when using Internet Explorer, depending on your local settings, you may get a pop-up saying *'Internet Explorer restricted this webpage from running scripts or ActiveX controls.'* This is entirely normal and you can click *'Allow blocked content'* to proceed.

Do I need to be connected to the internet?
For LMS versions, the course can only be used on LMS with internet or intranet connections.
For the Non LMS version. When talking the course, the main body of both modules can be used whilst not connected to the internet. There are a couple of links for 'further reading' that do require internet access.

How long does it take to download the EP-Learning Tool?

How long time it will take depends on file size, your own download speed and the server's upload speed.

What files types is the tool available in?

Each module is an HTML5 file along with a set of associated files that are enclosed within a folder (distributed as a ZIP folder). The HTML file acts essentially like a web page meaning that the tools can be viewed in standards web browsers such as Chrome, Explorer, Firefox and Safari on Apple (these are the 4 that are recommended).

It is essential that the contents of these folders remain exactly as delivered for the tool to work.

Can my EPFI store the tool on our intranet?

Yes, the tool can be installed and stored in EPFIs' LMS and shared via your Intranet.

Can I download the tool and share it locally?

Yes, there are no technical restrictions on copying the tool, however please note that it should not be shared beyond your EPFI staff and in-house consultants. When sharing, always keep the integrity of the top layer ZIP file – do not share any of the enclosed files separately.

Can the tool be streamed across an intranet?

The non-LMS versions of the tool are built to be installed locally on each machine, but as long as an intranet is fast enough to cope with the embedded video playback, it should be possible to use the tool across an Intranet. The LMS versions are built for delivery across either internet or intranet.

Please note that when hosting each module, it is essential that the integrity of each folder is retained – moving any of the associated files from their original positions within their respective module folders will cause the tool to function incorrectly.

Can I take the course on my phone?

No. The Tool is only built for a normal browser or LMS.

Using the course

I am already know quite a bit about EP, do I need to complete the whole course?

Yes, the course is designed to follow the EP Principles' order to ensure comprehensive learning. Within Module 1, users cannot go to the next session without finishing the previous session. EPFIs are encouraged to proceed through the course sequentially to ensure they retain key information in the intended sequence.

Can I pause my progress and return later?

Yes, in LMS versions only - for both modules, if you do not finish the module in one go, you could log off and when you log in again, you will be taken back to the exact place where you left off. Upon returning to the Tool, you can navigate to earlier parts of the tool via the 'Table of Contents' feature.

Can I share the course with in-house consultants?

The e-Learning tool was developed for the benefit of EPFIs and their staff. According to the discretion of the EPFI, individual in-house or long-term consultants *may* be provided access to the tool.

A confidentiality agreement is strongly encouraged, and the EPFI should notify the Secretariat of the names of any non-staff who have been given access to the tool.

Can I share the course with external parties eg consultants?

At this stage, the Association is only considering sharing the course within EPFIs and not with any external parties. After a period of use and positive feedback from EPA users, the working group will consider sharing it with broader stakeholders.

Can I take the course which does not show a score?

There are two formats for the Tool - one with reporting turned on, one with reporting turned off.

EPFIs with concerns abouts scores being recorded are able to download the "LMS with no reporting" version of the tool does not show scores.