



Edify

Administration:

A Comprehensive User Manual



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Key



Premium Feature

This symbol indicates that a feature is a premium feature which means that it is not enabled automatically. You can request that the feature be enabled by contacting the Catapult Team. If a non-premium feature is missing, speak to your organisation's Account Owner about enabling them for you.



Internal Feature

A Feature with this symbol needs to be actioned by the Catapult team. It is not available for Client Users.

Getting Started



Welcome to Edify

As the first User to be added to your Edify account, you will have the Account Owner permission settings. This will give you access to all of the default permissions plus additional Account Owner permissions which will allow you access to all of the administration control in Edify.

Once you have logged into your account, you will have the ability to create new Users for the account. These new Users will have the default permissions, but not the Account Owner administration permissions, unless you enable them.

We will go over how you access your Edify account and change your account settings next. User creation & Permission settings will be covered in the next chapter.

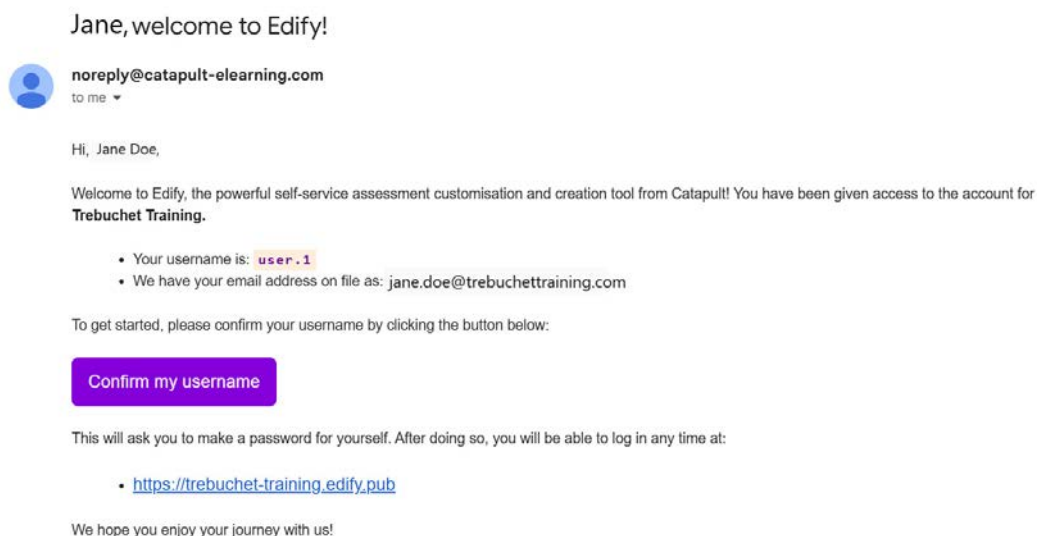


A [Glossary](#) of system terms is available at the back of this manual for your reference.

Access

When you first activate your Edify account, you will receive a **confirmation email**. If you are the Account Owner, the Catapult team will set up your account and trigger the email. If you are creating an account for another user, then the email will be sent to the address you specify when creating the User. For more information on creating Users, refer to [Edify User](#).

The email will contain a **unique link**, click on the link and follow the prompts to **activate** your account and set your **password**. You can then **sign in**. An example of the email is shown below:

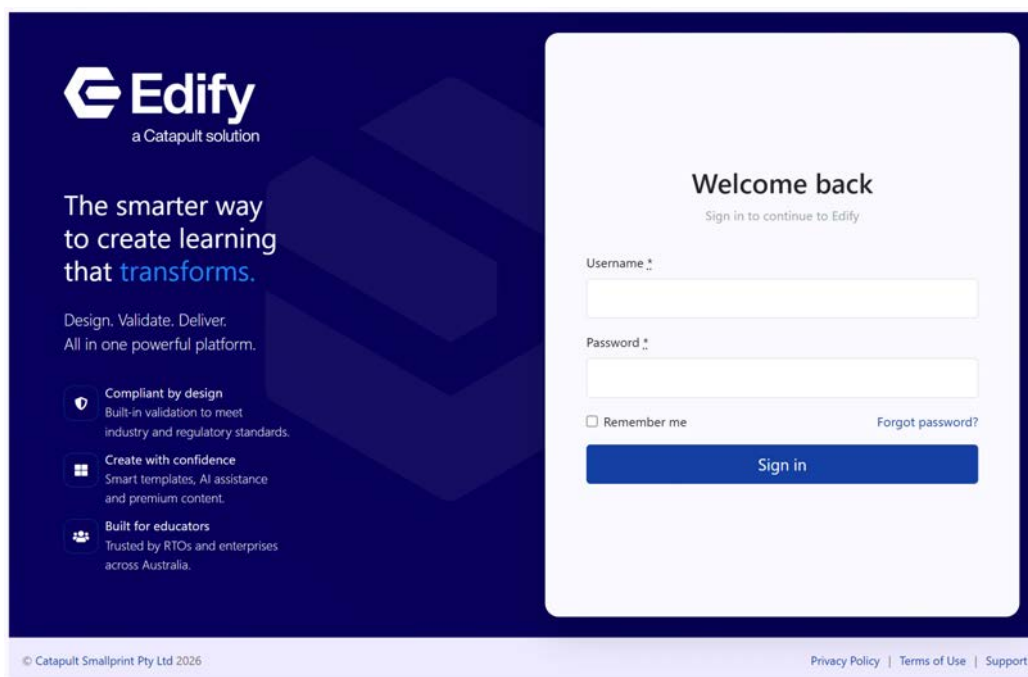


Note:

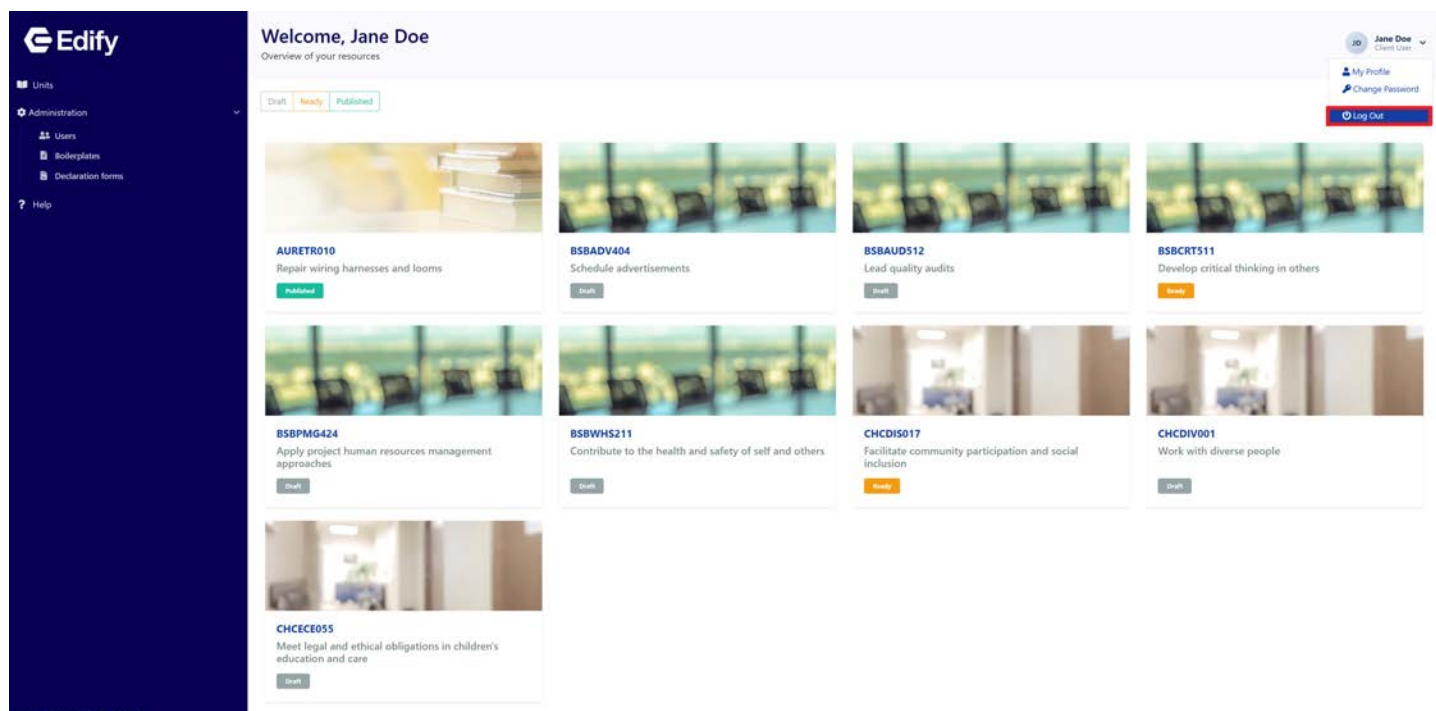
If you can't find the email, double check your email address has been entered correctly and check your junk folder.

Signing In/Out

To sign in to your account again, you will need to use your domain address. This will have been provided to you in your welcome email when your account was set up. This will be the name of your domain (usually your organisation name or an abbreviation thereof) then .edify.pub. Once you have accessed your Edify domain, you can sign in using the credentials you set up when creating your account.



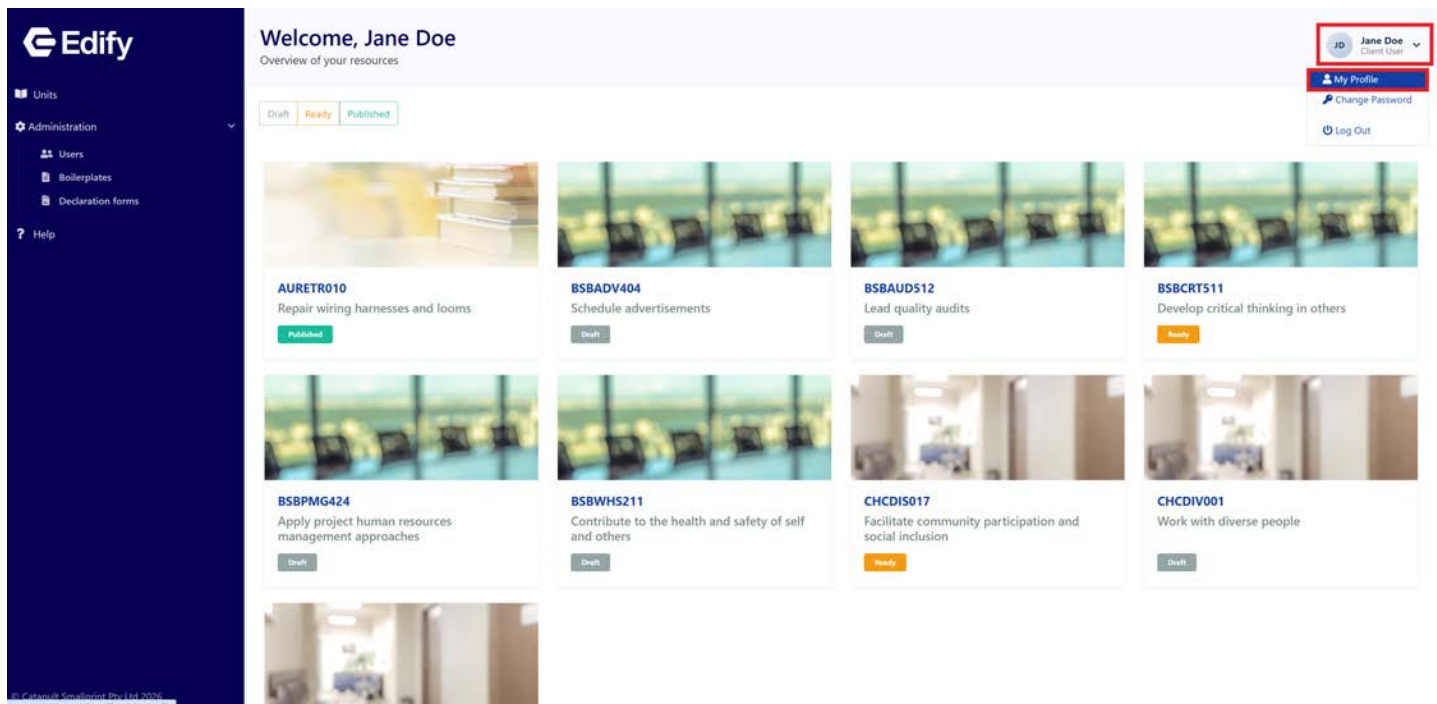
To sign out of your account, go to your **Username** at the top right of the screen and select **Log Out** from the drop-down menu.



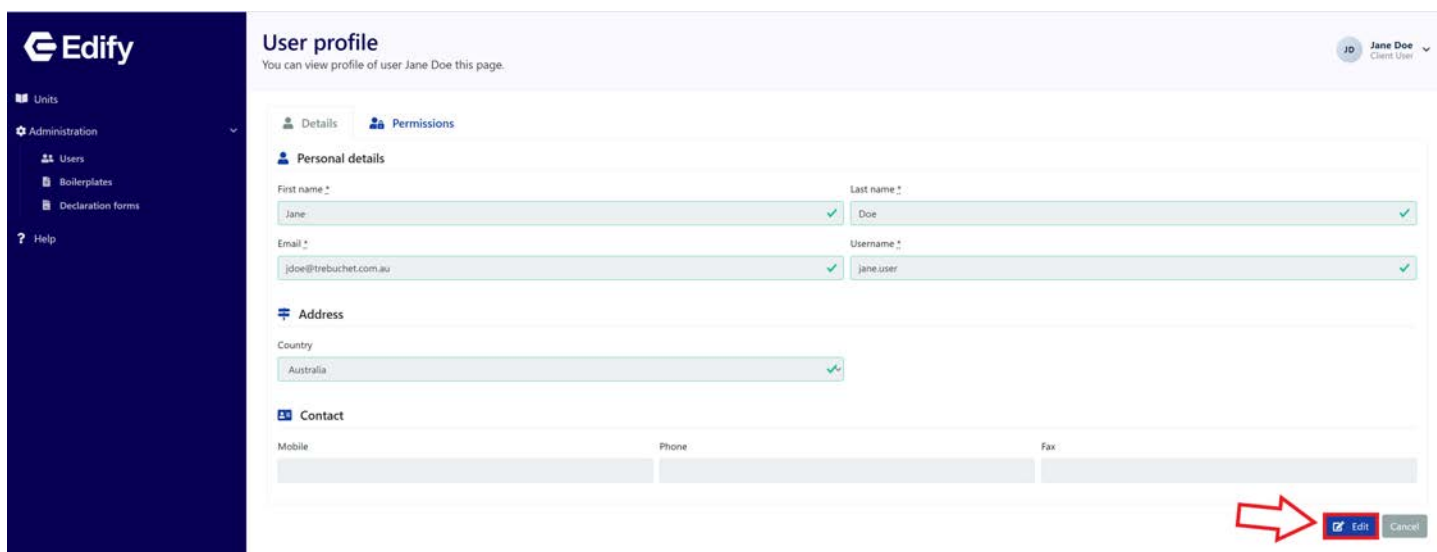
My Profile

The My Profile page is where you can edit your details in Edify. This allows you to change your contact details, such as your email address (a confirmation email will be sent if you do this). This can be helpful if you need to update any of your contact information.

To access My Profile, click the drop down arrow next to your User name at the top right of the screen.



The window will then open the **User Profile** page where you can click the **Edit** button to edit your profile. Be sure to click **Save** once you are done.



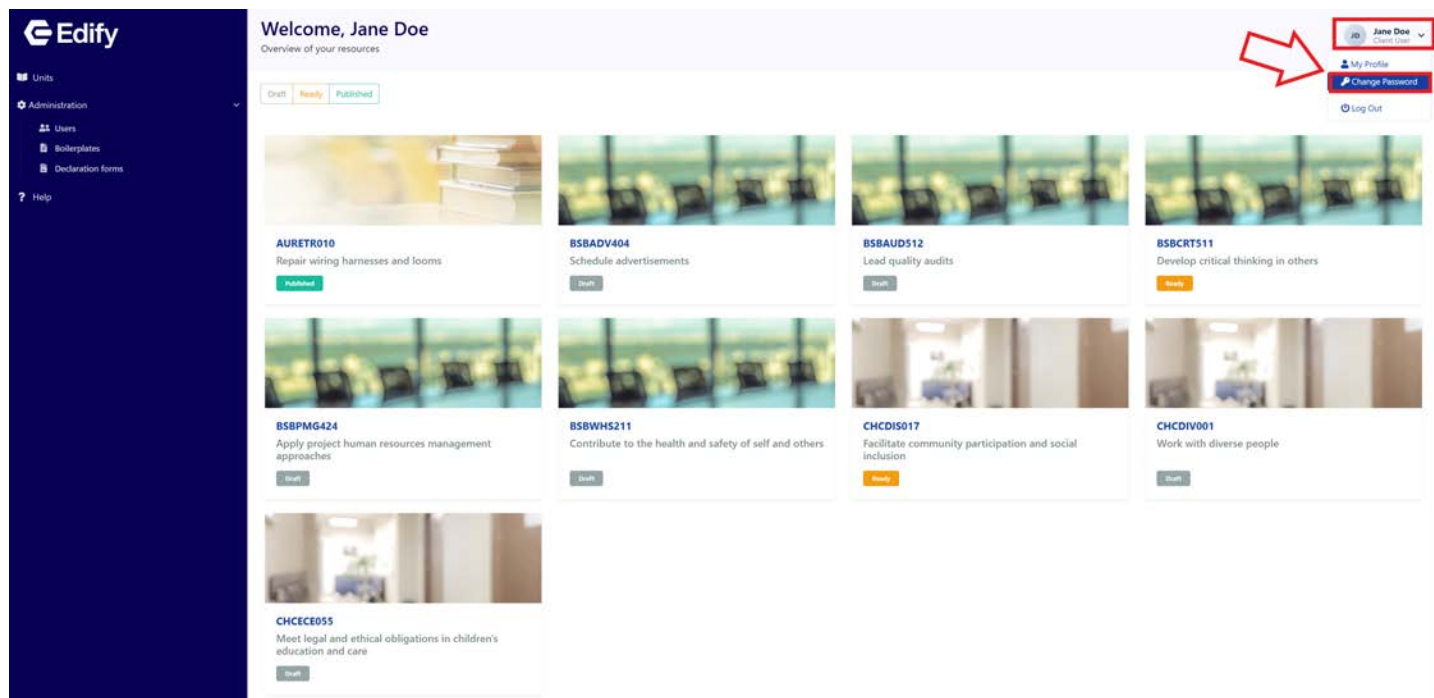
Note:

Only the Account Owner or Users who have been given the necessary permissions can edit Permissions.

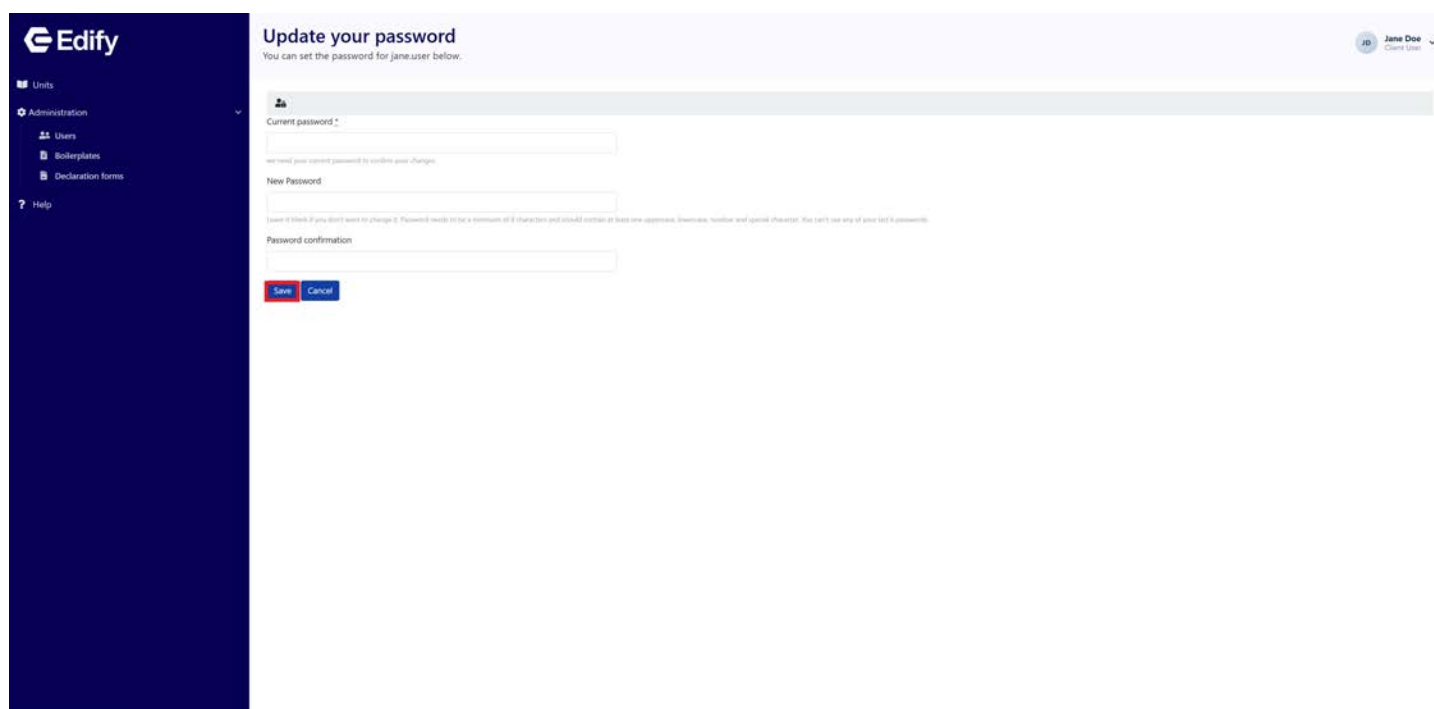
Changing your Password

Changing your Password will change your personal log-in password. You may need to do this if your Password has been compromised or if changing it in regular intervals is required by your organisation.

To change your Password, click on your User Name at the top-right of the screen and select Change Password from the drop-down menu.



You will then need to type your **current** password and then type your **new** password **twice** to confirm it. Once this is done, click **Save**.

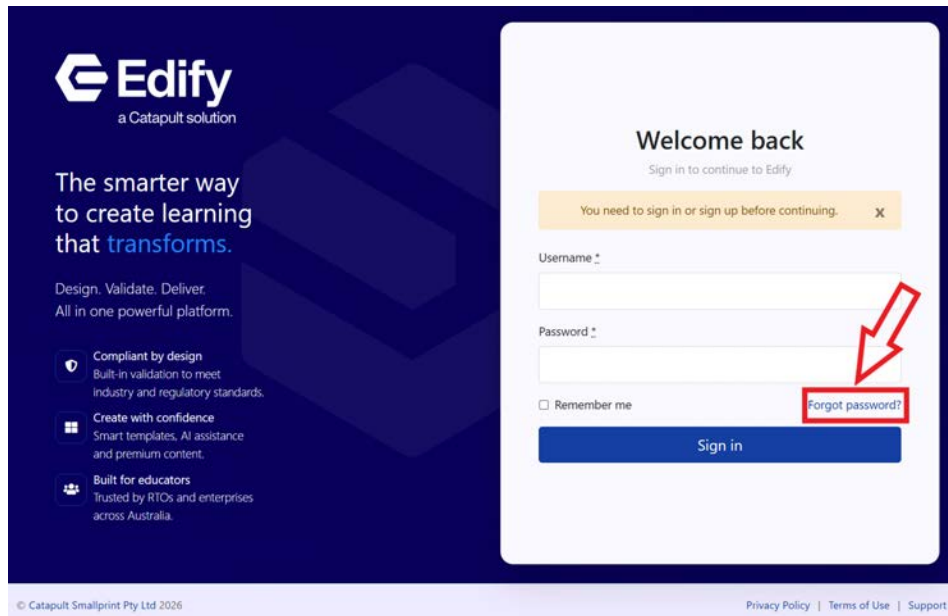


If you cannot remember your password, you will need to follow the steps for [Forgot Password](#).

Forgot Password

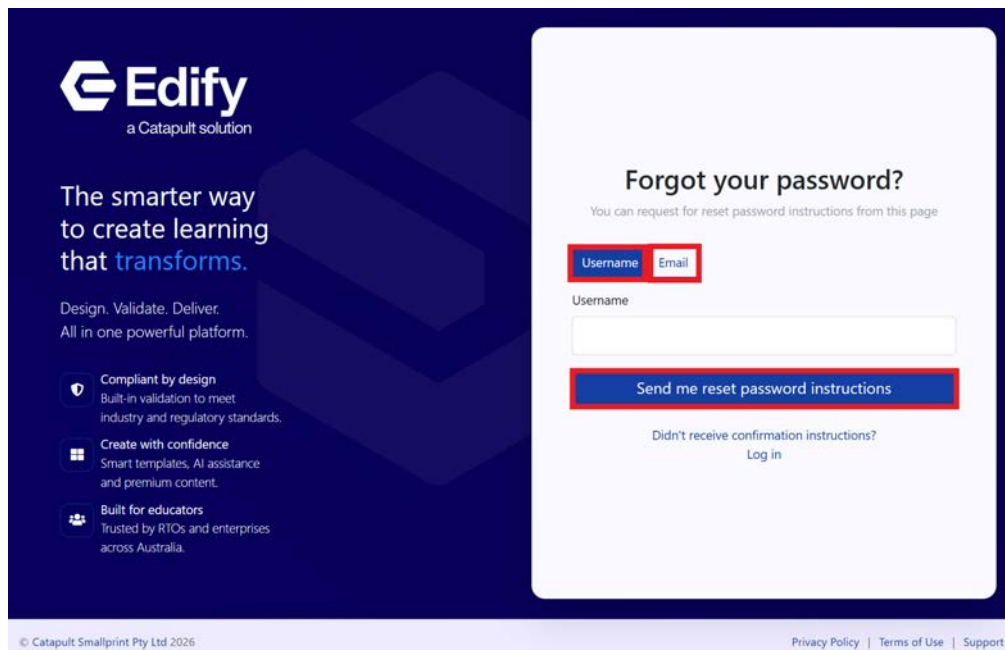
If you have forgotten your Password, you will need to reset your password by clicking the **Forgot Password?** button.

To do this, go to the Edify Sign In page and click **Forgot Password?**



The screen will then open a new page with the text **Forgot your password?**

You can then choose to either select to use your Username or Email (this will need to be the email address attached to your account). Once you have entered either your Username or email, click **Send me reset password instructions**. You will then receive an email to your email address attached to your Edify account with instructions on resetting your password.



Organisation

The Organisation page contains your Organisation Settings. This includes your **Account Details**, **NRT Unit Settings** and **Security Settings**. We will go over each of these separately.

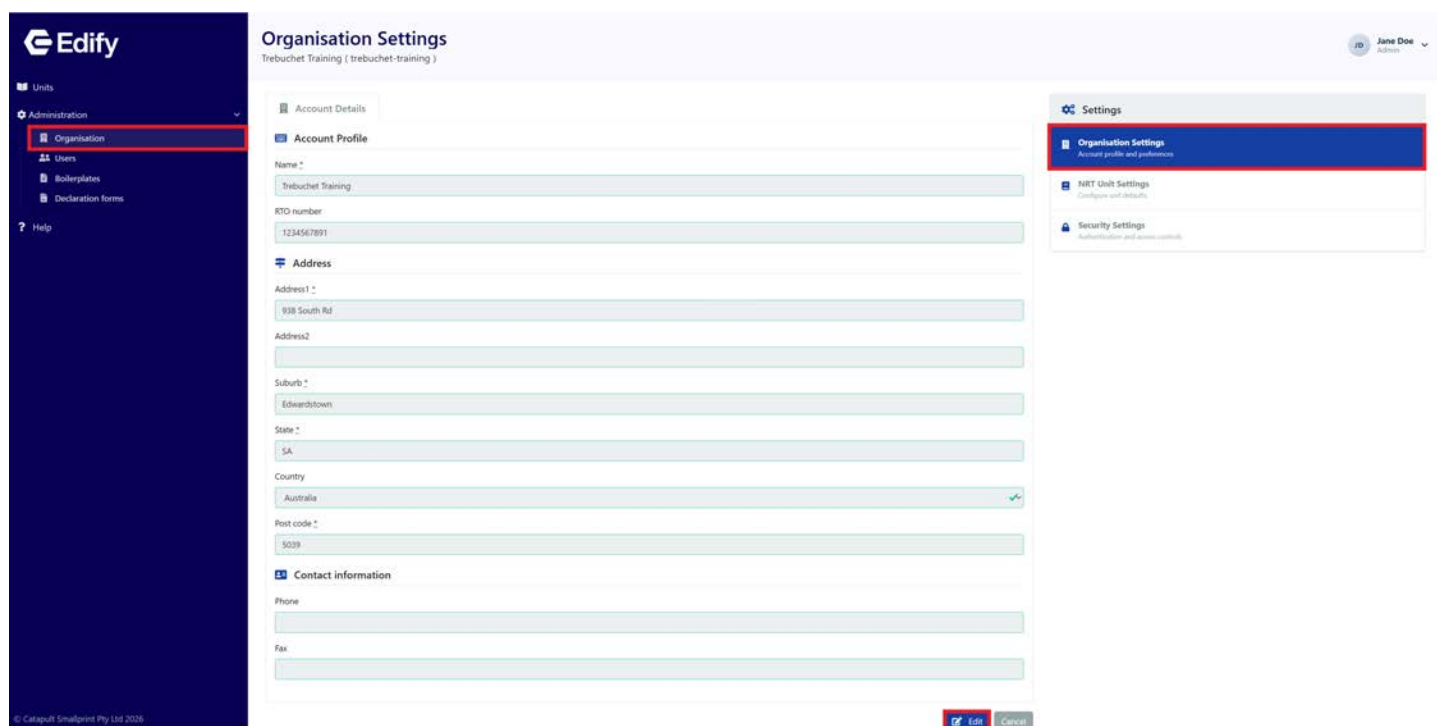
Note:

If you need to access this page, but it is not visible on your Menu, speak with your Account Owner about enabling it for your profile.

Account Details

The Account Details cover your account's Name and your RTO number (these can only be edited by the Catapult team), as well as your **organisation's contact details** which you can update by clicking the **Edit** button.

Once you have made your edits, click **Save** to apply them.

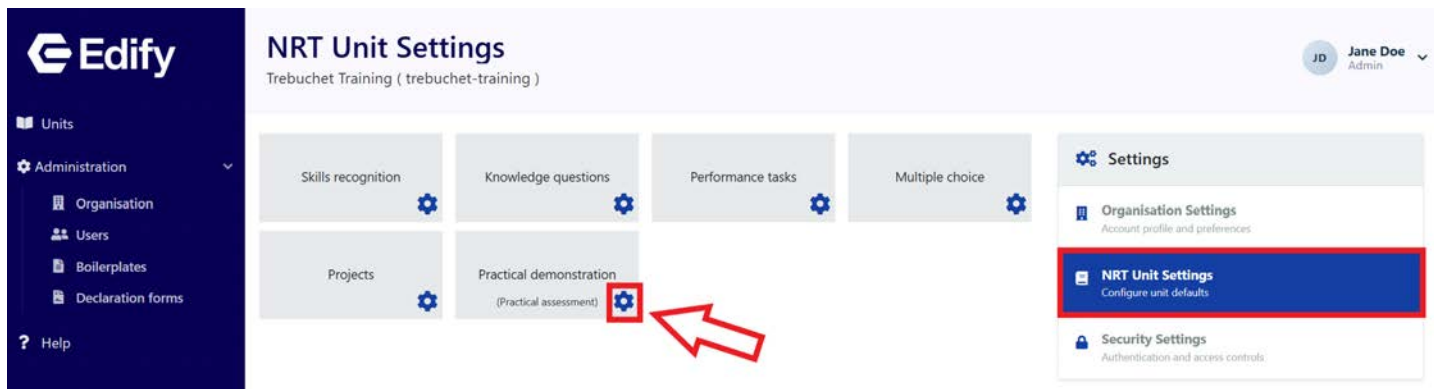


The screenshot displays the 'Organisation Settings' page in the Edify application. On the left, a dark blue sidebar contains a menu with 'Organisation' highlighted in red. The main content area is titled 'Organisation Settings' and shows the 'Account Profile' tab. It includes fields for 'Name' (filled with 'Trebuchet Training'), 'RTO number' (filled with '1234567891'), and 'Address' (with fields for Address1, Address2, Suburb, State, Country, and Post code). Below these is the 'Contact information' section with fields for 'Phone' and 'Fax'. On the right, a 'Settings' sidebar lists 'Organisation Settings' (highlighted in red), 'NRT Unit Settings', and 'Security Settings'. At the bottom right, there are 'Edit' and 'Cancel' buttons. The footer of the sidebar mentions '© Catapult Smallprint Pty Ltd 2026'.

NRT Unit Settings

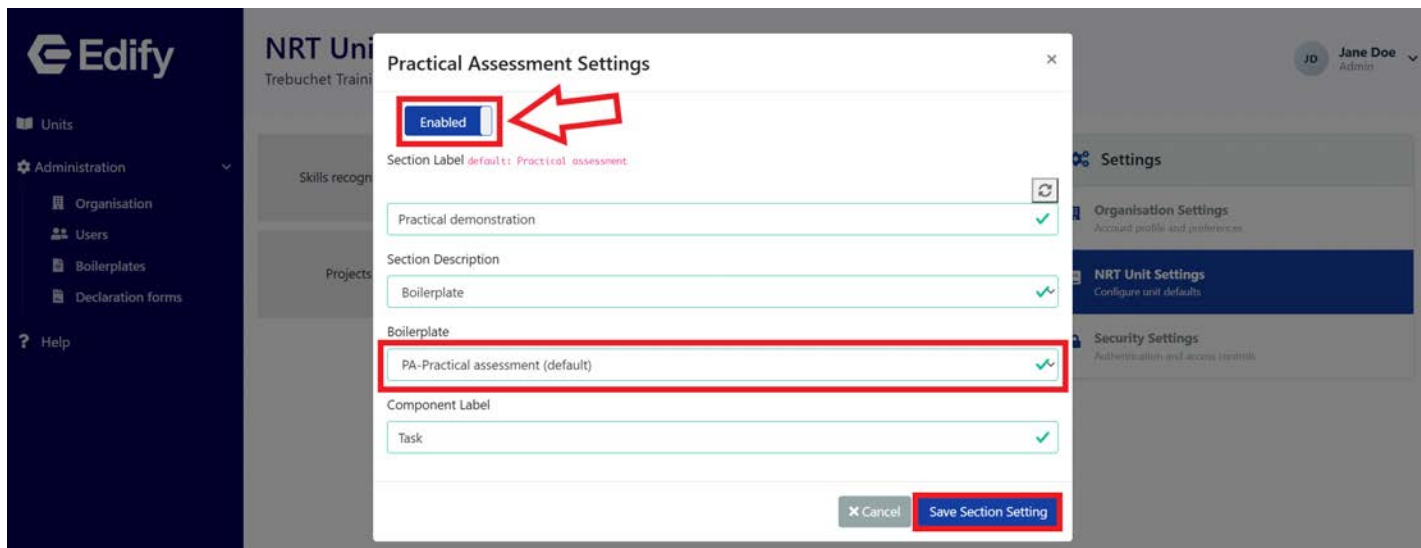
This is where you can configure your **Unit default settings** to edit or remove any unwanted sections from any **newly added** custom units in your Edify library. You may want to use this section if there is a default Section you **do not want** included in **any** of your custom units or if you want to add your **own** Boilerplate instructions to a **Default Section** across your custom library. NRT Unit Settings are available to **Premium client organisations** and can only be accessed by a user with **Account Owner** permission.

To **edit or disable** a section, click on the **settings cog** on the Section.



You can then make any necessary changes, such as clicking the **Disable/Enable** button to edit the Section's availability or use the **dropdown menus** provided to change Boilerplates and naming.

Once you have finished making your changes, click **Save** to apply them.



Note:

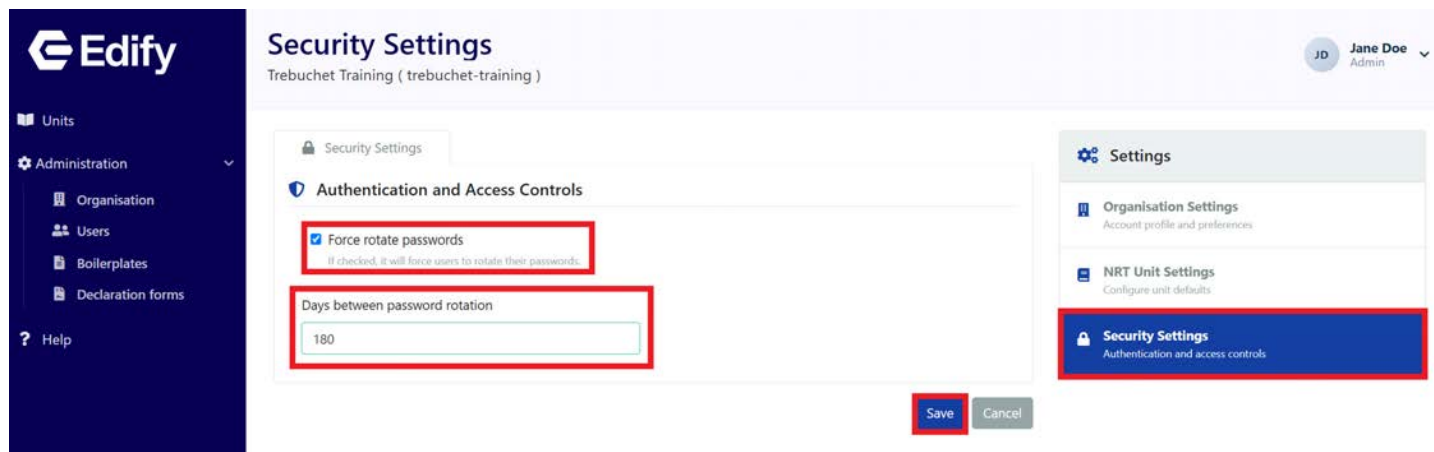
These changes will only apply to Units cloned or created after the Settings have been applied. It will not update any existing Custom units in your library.

Security Settings

The Security Settings page allows you to control the **Security** of your account through **password rotation**. This **forces** Users to **change their password** each rotation, which strengthens the security of your account by reducing the chance of a compromised password being used by an unauthorised User.

To set-up the password rotation, check the box next to **Force rotate passwords** and then type the **number of days between password rotations** into the box below. This will then force **all Users** in your account to change their password once the specified time period has elapsed.

Once this is set-up, click **Save** to apply.



The screenshot displays the Edify Security Settings interface. On the left is a dark blue sidebar with the Edify logo and navigation links: Units, Administration (with a dropdown arrow), Organisation, Users, Boilerplates, Declaration forms, and Help. The main content area is titled 'Security Settings' for 'Trebuchet Training (trebuchet-training)'. It features a 'Security Settings' tab and a section for 'Authentication and Access Controls'. Within this section, the 'Force rotate passwords' checkbox is checked and highlighted with a red box. Below it, the text 'If checked, it will force users to rotate their passwords.' is visible. The 'Days between password rotation' input field contains the value '180' and is also highlighted with a red box. At the bottom right of the main content area are 'Save' and 'Cancel' buttons, with the 'Save' button highlighted by a red box. On the right side of the page is a 'Settings' sidebar containing links to 'Organisation Settings', 'NRT Unit Settings', and 'Security Settings' (which is highlighted with a red box and labeled 'Authentication and access controls'). The top right corner shows a user profile for 'Jane Doe' (Admin) with a dropdown arrow.



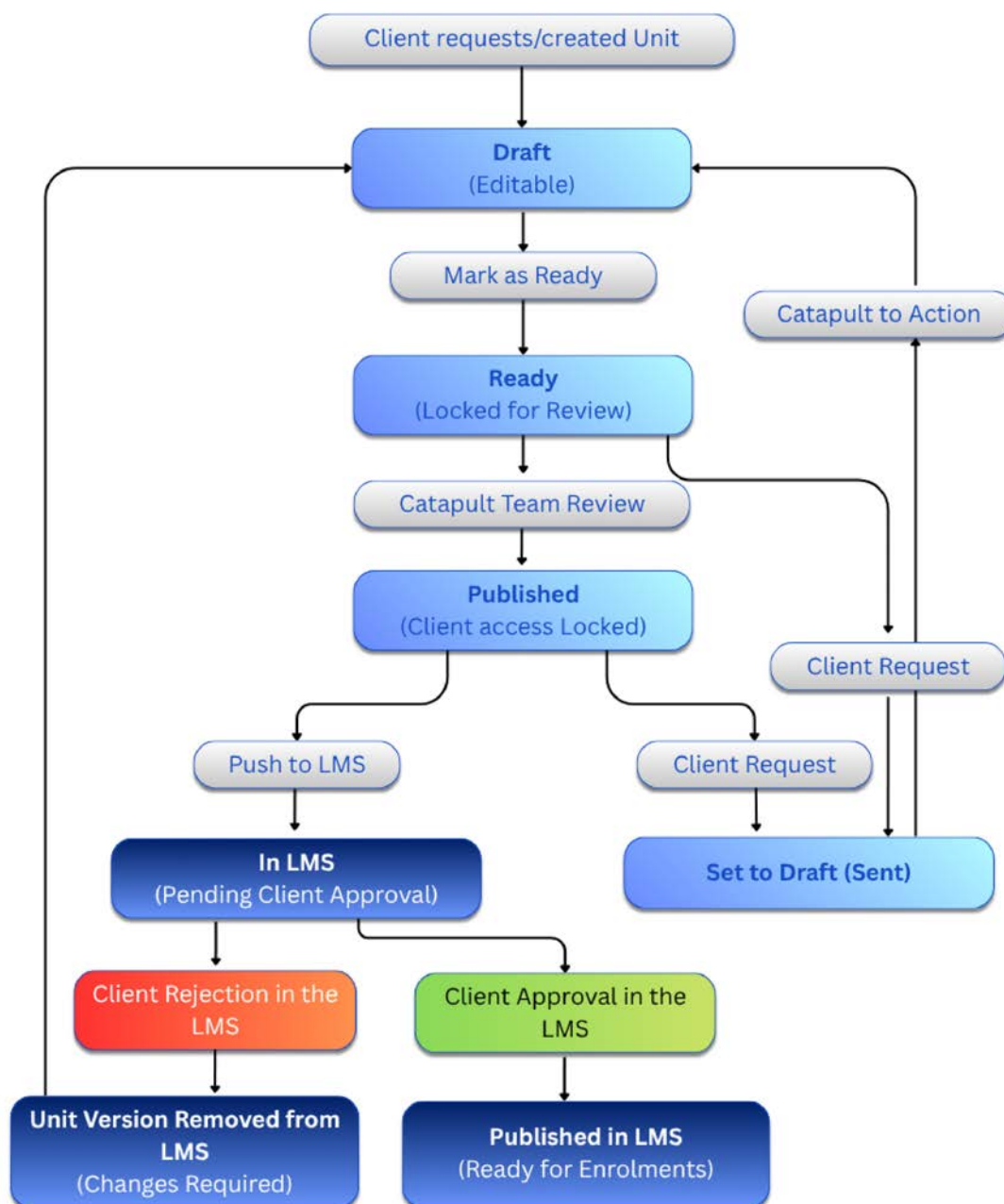
Edify Units



Units

Units can be built directly into the Edify system or you can request access to Catapult Units for Customisation. Catapult resources are written to the standards as prescribed on training.gov.au. Any Units that are part of the **Catapult Library** can be edited with the Edify tool. Editing allows you to customise or contextualise a unit to your training requirements.

The diagram below depicts the workflow when editing a Unit in Edify and process for publishing it in the LMS.



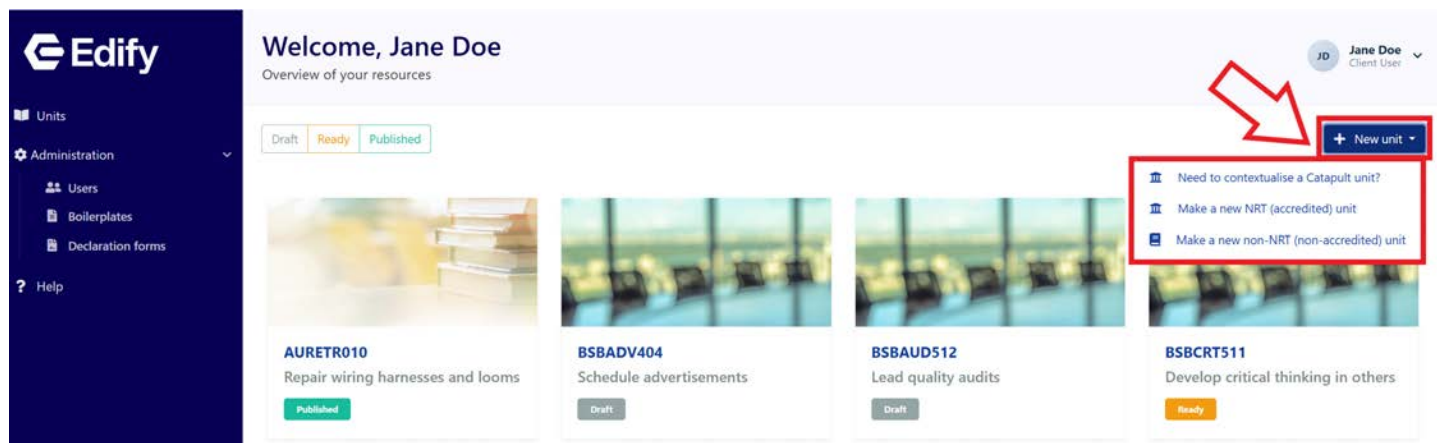
A Unit status of Published in Edify **does not** indicate that the Unit has been Published in the LMS. Once you have set the Unit to Published in Edify, the Catapult team will review your changes and you will receive an email notification when it is ready to be reviewed in the LMS. You will then need to Approve the Unit and it will be published by the Catapult team. You will then receive an email notification once it is published in the LMS.

Adding Units to your Library

In order to customise an assessment, you must first add Units to your account library. You can request a Unit from the **Catapult library** to be added to your Edify account for editing or you can create a **blank** Unit as an **NRT** or **non-NRT** Unit. Once you have existing Units in your library, you can choose to clone these Units to create different editions.

To do add a unit to your Library, click the **+ New Unit** button at the top right of the home screen.

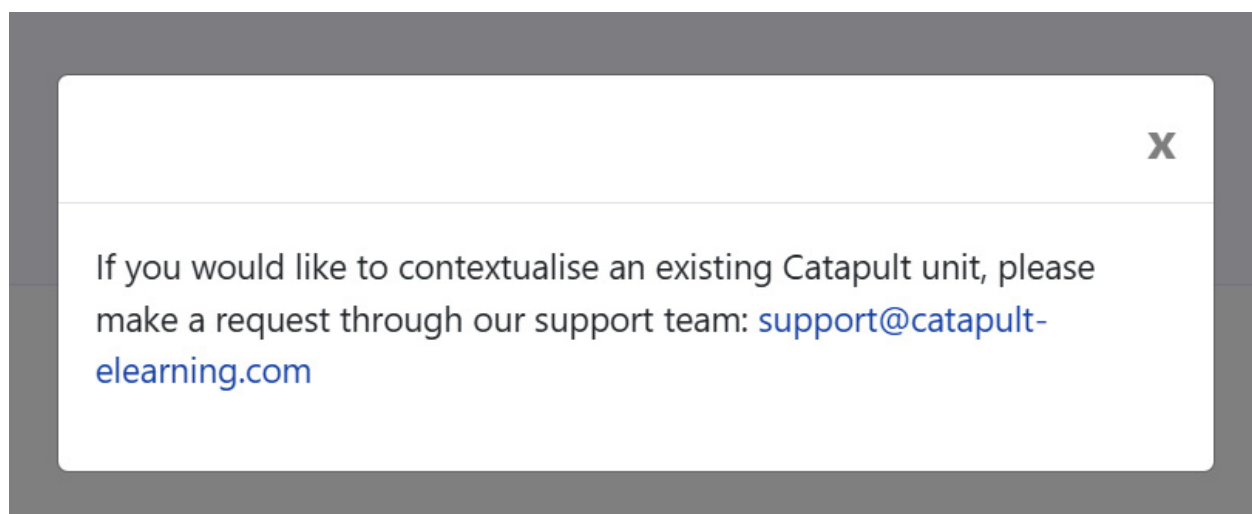
A dropdown menu will appear with three options.



Let's take a look at how each option works.

Requesting a Catapult Unit for Contextualisation

A Catapult unit is a standard Catapult resource. To request a Catapult Unit to be added to your Edify account for editing, you will need to email your request through to our support team at: **support@catapult-elearning.com**. The team will then add the Unit to your account and let you know when it is ready to be edited. Clicking the option from the drop-down menu will give you the message below.



NRT Unit

An NRT (Nationally Recognised Training) Unit is an accredited Unit with a nationally recognised training code. This will create a Unit and pull all the Unit information from training.gov.au. You can then build your assessment using all of the pre-filled Unit information.

To build an NRT Unit, select **Make a new NRT (accredited) Unit** from the dropdown menu. A pop-up window will appear.

New NRT unit

Code

This will create a blank unit. If you would like to contextualise an existing Catapult unit, please make a request through our support team: support@catapult-elearning.com

✕ Cancel

+ Create

+ Create & open

Add the Unit code to the box labelled **Code**. (This must be a nationally recognised training code)

Then click + **Create & open** and your Unit will open, ready for editing.

Note:

Creating a new NRT unit will pull unit details and information from training.gov.au.

Assessment sections and some Supporting info will be *blank*.

Non-NRT Unit

A Non-NRT is a **non-accredited Unit**. This will create an empty Unit and is designed for non-accredited courses.

To build a non-NRT Unit, select **Make a new non_NRT (non-accredited) Unit** from the dropdown menu. A pop-up window will appear.

New Non NRT unit

×

Code

Title

Package

▼

This will create a blank unit. If you would like to contextualise an existing Catapult unit, please make a request through our support team: support@catapult-elearning.com

✕ Cancel
+ Create
+ Create & open

Add the Unit code to the box labelled **Code**. (This must be between **4 - 12 characters** consisting of uppercase letters and numbers. The **first character must be a letter**. **No spaces or special characters** to be included.)

Add the title to the box labelled **Title**.

Select the **Package** from the dropdown menu. You can choose **Non-Accredited (NA)** for non-accredited Units.

Then click **+ Create & open** and your Unit will open, ready for editing.

Important!

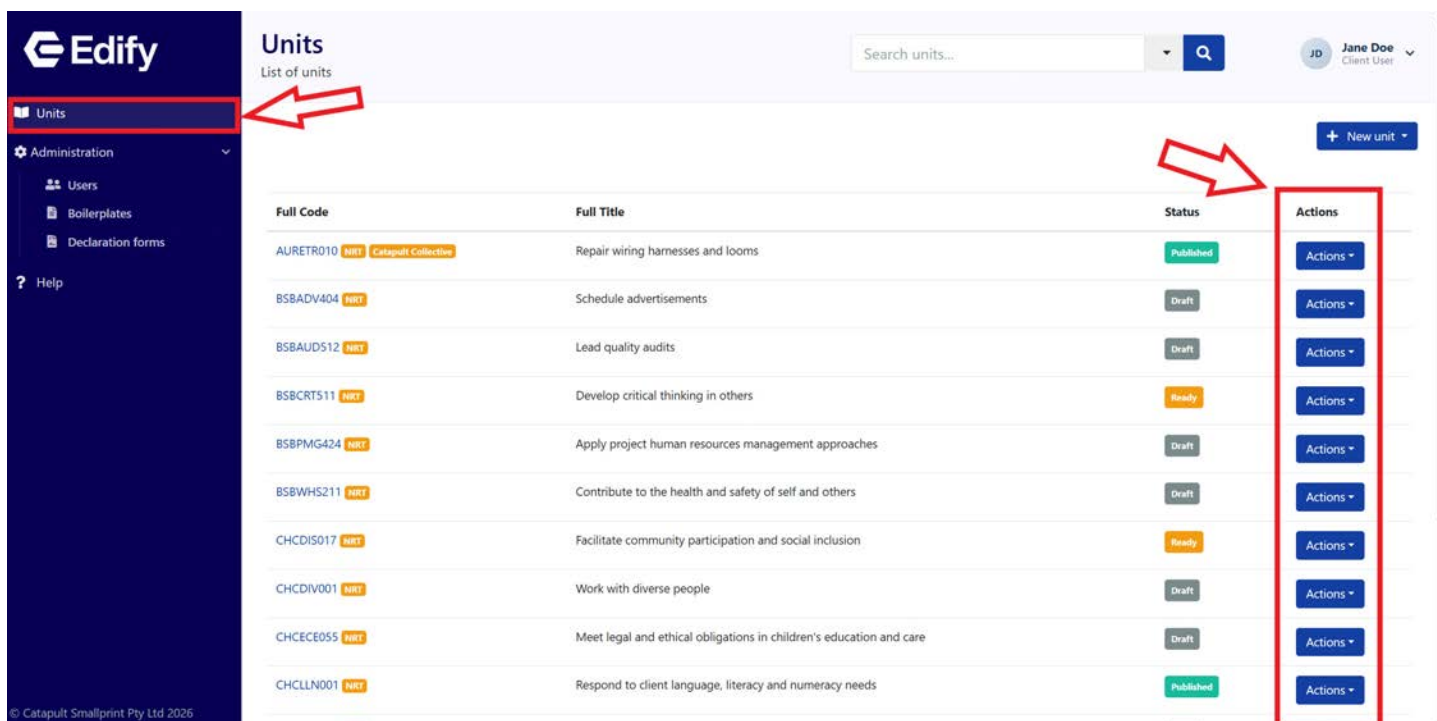
Assessment sections and Supporting info will be *blank*.

Mapping will *not* be available.

Cloning an Existing Unit

To clone an existing Unit, click on **Units** on the Left-side Menu.

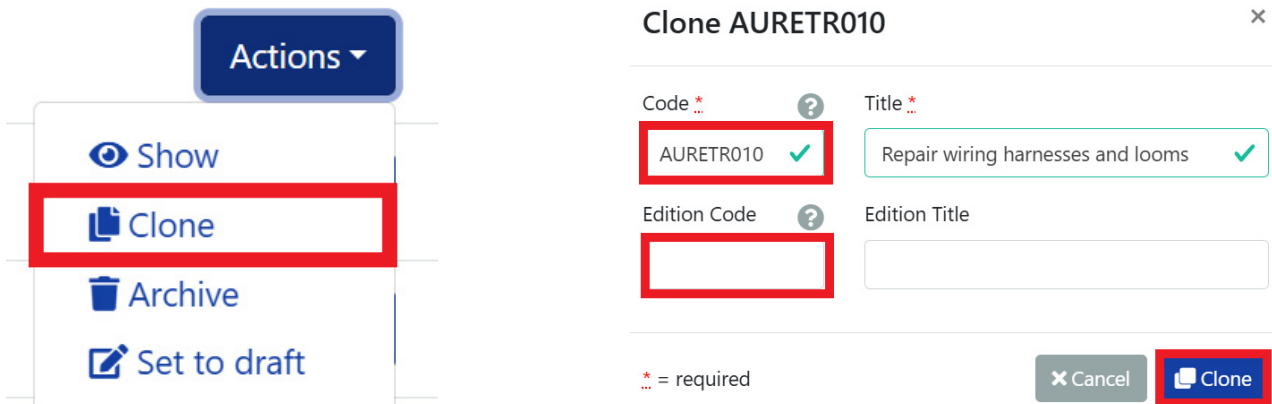
This will open a list of your organisation's **Units** where you can view and edit all of the Units in your Edify account. You will see a button to the right of each Unit that says **Actions**. Click the button next to the unit code that you wish to clone. This will expand the **Actions menu**.



The screenshot shows the Edify interface. On the left, the 'Units' menu item is highlighted with a red box and an arrow. The main area displays a table of units. The 'Actions' column for the first unit, AURETR010, is highlighted with a red box and an arrow.

Full Code	Full Title	Status	Actions
AURETR010 NRT Catapult Collective	Repair wiring harnesses and looms	Published	Actions +
BSBADV404 NRT	Schedule advertisements	Draft	Actions +
BSBAUD512 NRT	Lead quality audits	Draft	Actions +
BSBCRT511 NRT	Develop critical thinking in others	Ready	Actions +
BSBPMG424 NRT	Apply project human resources management approaches	Draft	Actions +
BSBWHS211 NRT	Contribute to the health and safety of self and others	Draft	Actions +
CHCDIS017 NRT	Facilitate community participation and social inclusion	Ready	Actions +
CHCDIV001 NRT	Work with diverse people	Draft	Actions +
CHCECE055 NRT	Meet legal and ethical obligations in children's education and care	Draft	Actions +
CHCLLN001 NRT	Respond to client language, literacy and numeracy needs	Published	Actions +

Select **Clone** from the **Actions menu**. A pop-up window will then appear.



The screenshot shows the 'Clone AURETR010' pop-up window. The 'Clone' button in the 'Actions' menu is highlighted with a red box. The pop-up window shows fields for 'Code' (AURETR010), 'Title' (Repair wiring harnesses and looms), 'Edition Code', and 'Edition Title'. The 'Clone' button at the bottom right is also highlighted with a red box.

You will need to make an **adjustment** to either the **Code** or **Edition Code** fields to differentiate the Unit from the original. This can be an Edition code (with or without an Edition Title) e.g. C2. Or an adjustment to the Code such as adding a number or letter to the end e.g. BSBAUD512C2. Once this is done, click **Clone**.

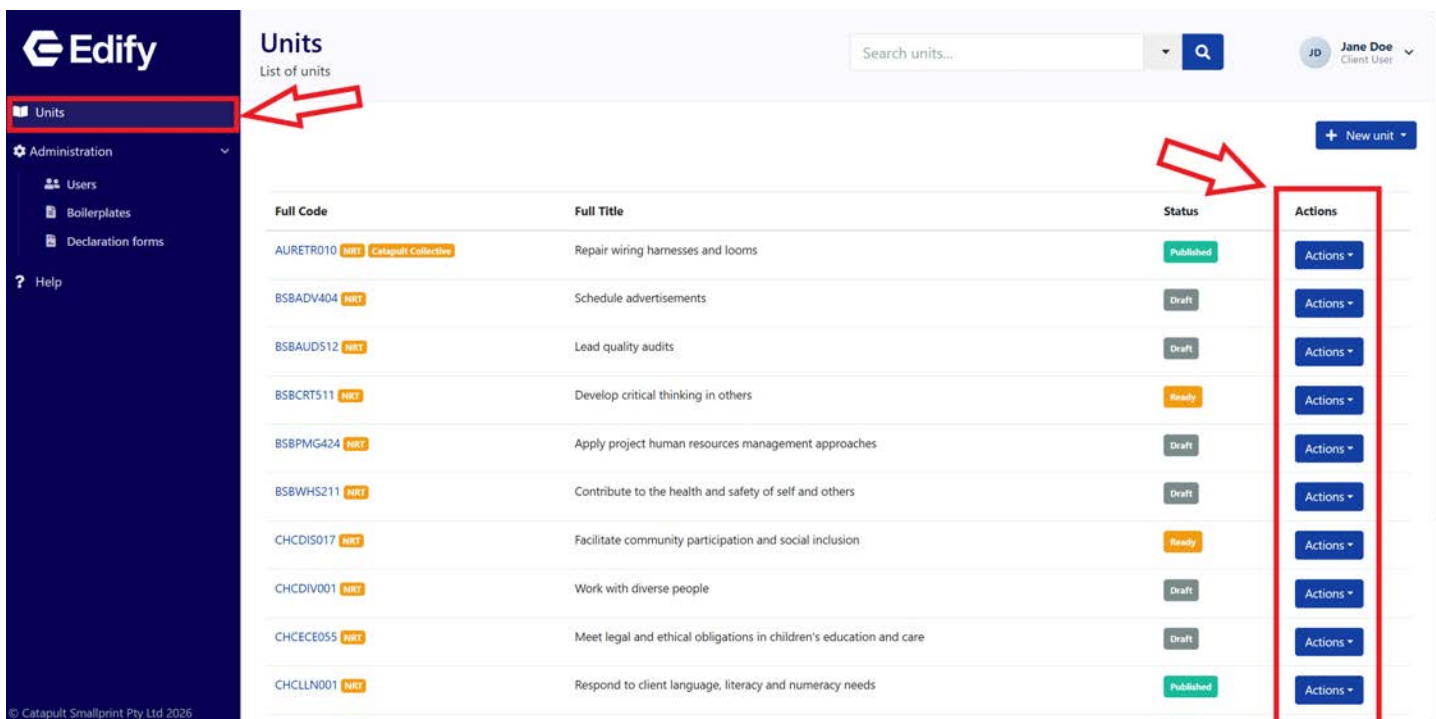
Note:

Special characters *cannot* be used in Codes or Edition Codes.

Units Actions Menu

As shown in the previous section, the Actions menu allows you to manage a Unit. This menu covers a variety of actions such as Show, Clone, Archive and Set to draft. Some options will change according to Unit's status.

Actions can be accessed by clicking the Actions button to the right of the title.



Full Code	Full Title	Status	Actions
AURETR010 NRT Catapult Collective	Repair wiring harnesses and looms	Published	Actions +
BSBADV404 NRT	Schedule advertisements	Draft	Actions +
BSBAUD512 NRT	Lead quality audits	Draft	Actions +
BSBCRT511 NRT	Develop critical thinking in others	Ready	Actions +
BSBPMG424 NRT	Apply project human resources management approaches	Draft	Actions +
BSBWH5211 NRT	Contribute to the health and safety of self and others	Draft	Actions +
CHCDI5017 NRT	Facilitate community participation and social inclusion	Ready	Actions +
CHCDIV001 NRT	Work with diverse people	Draft	Actions +
CHCECE055 NRT	Meet legal and ethical obligations in children's education and care	Draft	Actions +
CHCLLN001 NRT	Respond to client language, literacy and numeracy needs	Published	Actions +

When clicking a Unit's Actions menu, you may see the following options:

Show

Opens the Unit in **view-only** mode.

Clone

Creates a **separate copy** of the Unit, including its existing content and structure. You must **change** identifying information (Unit code, Title, Edition code or Edition title) so the new Unit can be distinguished from the original. Changes to the clone do not change the original Unit.

Mark as Ready

Changes a Unit from Draft to Ready and submits it for Catapult's review. You must enter comments explaining the changes and whether a major or minor update is required. Once marked Ready, the Unit can no longer be edited unless it is returned to Draft.

Set to Draft

This sends the Catapult team a request to return a Ready or Published Unit to Draft. After sending the request, the option displays Set to Draft (sent). You will be notified when the Unit is available for editing again.

Archive

This removes the Unit from the Units list, but does not permanently delete the Unit. Use this for a Unit that is no longer required. A Published Unit cannot be archived until its status has been changed to Draft. Archived Units will need to be restored by the Catapult team.

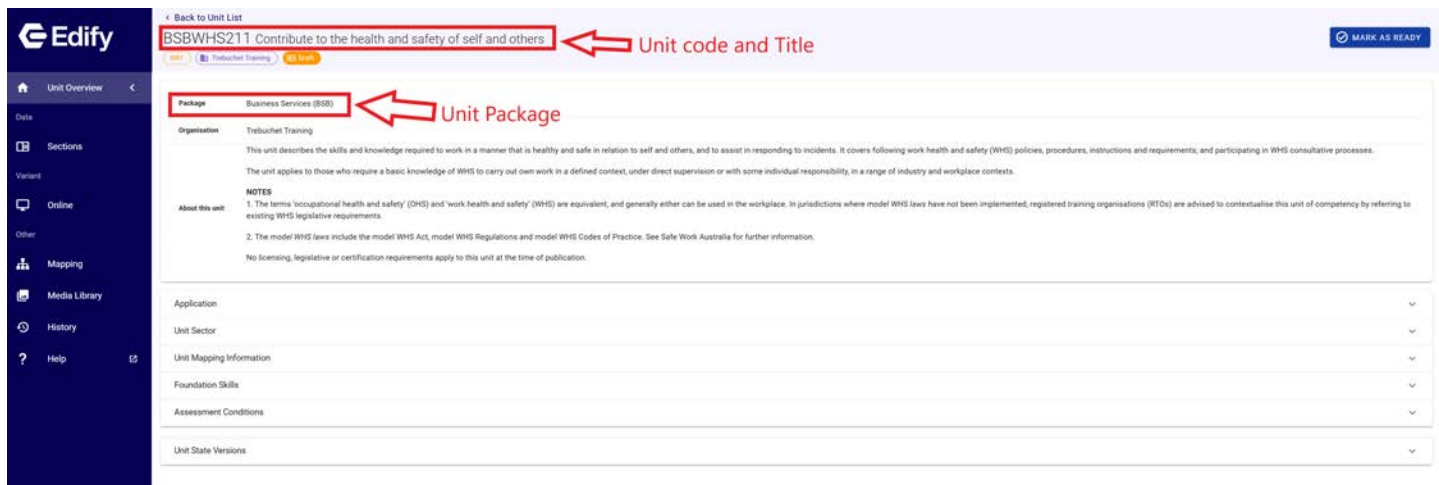
Changing an Existing Unit

If you have a pre-existing unit in your library that you want to change the aspects listed below, you will need to **contact the Catapult team**. We will then make the changes on your behalf.

Editing Unit Details

This includes changes to:

- Unit Code
- Unit Title
- Unit Package



The screenshot shows the 'Unit Overview' page in the Edify system. The unit code 'BSBWHS211' and title 'Contribute to the health and safety of self and others' are highlighted with a red box and labeled 'Unit code and Title'. The 'Package' field, which is 'Business Services (BSB)', is also highlighted with a red box and labeled 'Unit Package'. The page includes a sidebar with navigation options like 'Unit Overview', 'Sections', 'Variant', 'Online', 'Other', 'Mapping', 'Media Library', 'History', and 'Help'. The main content area displays details about the unit, including its organization (Trebuchet Training), a description, and notes.

Unarchive

If you require an archived Unit to be restored.

Set as read-only / Unset read-only

If a particular Unit is restricted from editing and can only be viewed. (This is different from setting up a User with Read only permissions as the Read Only is restricted for that Unit for all Users)

Convert to non-NRT

If you need to convert an accredited Unit to a non-accredited Unit and remove its mapping.

Note:

All actions mentioned on this page will need to be conducted by the Catapult team. Please contact us at: support@catapult-elearning.com for assistance.



Administration



Administration Menu

The Administration menu houses the additional features in your Edify account including Users, Boilerplates and Declaration forms. We will go over each of these features in this chapter.

Let's begin by looking at your Edify Users.



Users

As the **first user** to be added to Edify, you will become the **Account Owner**. To get your team started in Edify, you will need to add them as Users. An Edify **User** refers to an individual who has been granted the necessary permissions to log in and utilise Edify on behalf of their organisation. With Edify, various members of your organisation can collaborate and modify resources.

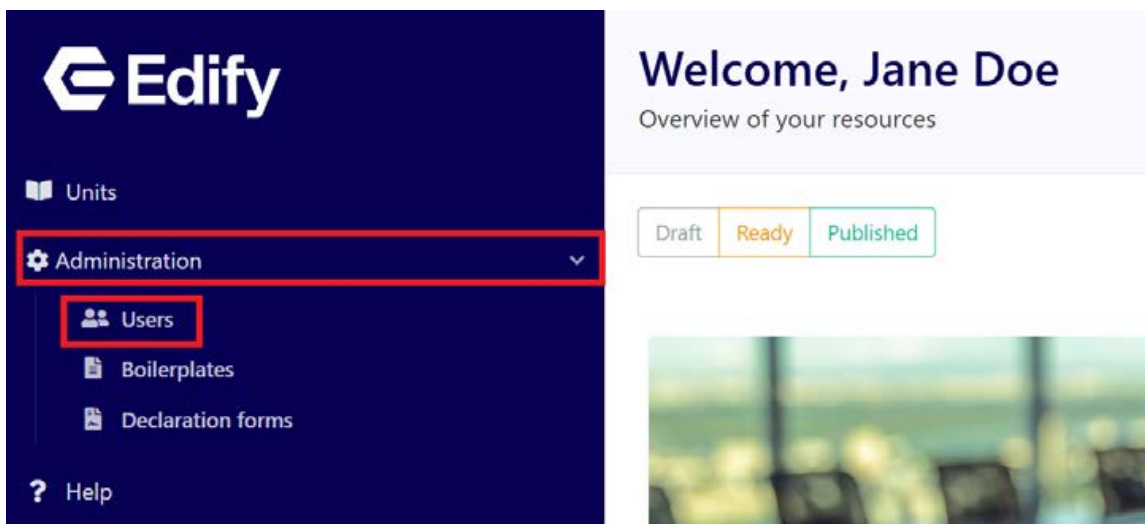
Important!

Its crucial to keep in mind that every User will have access to all the Units in the account.

There are two ways of creating a New User in Edify;

- Cloning an Existing User
- Creating a New User from scratch

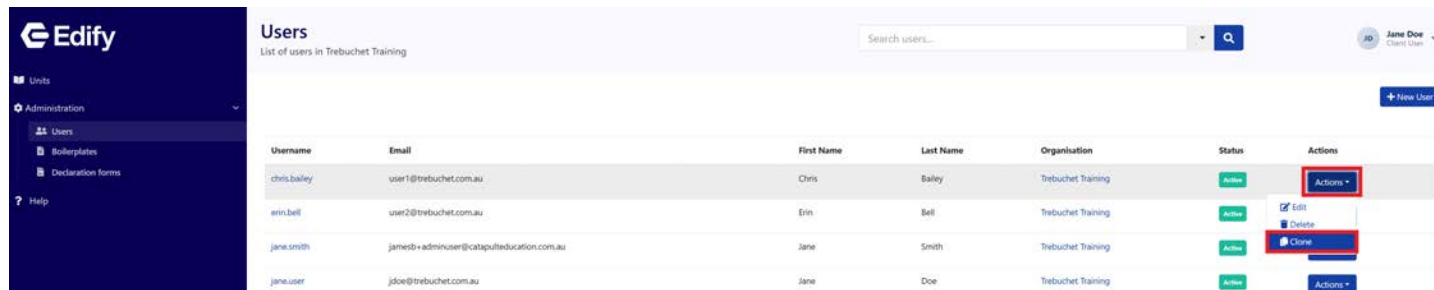
To access your Users, click **Users** under the **Administration** menu on the Left-side Menu.



Cloning Existing Users

The simplest way to **create a new User** is by **cloning an existing User**. This approach has the advantage of transferring all the permissions automatically. You can remove any unwanted permissions as needed.

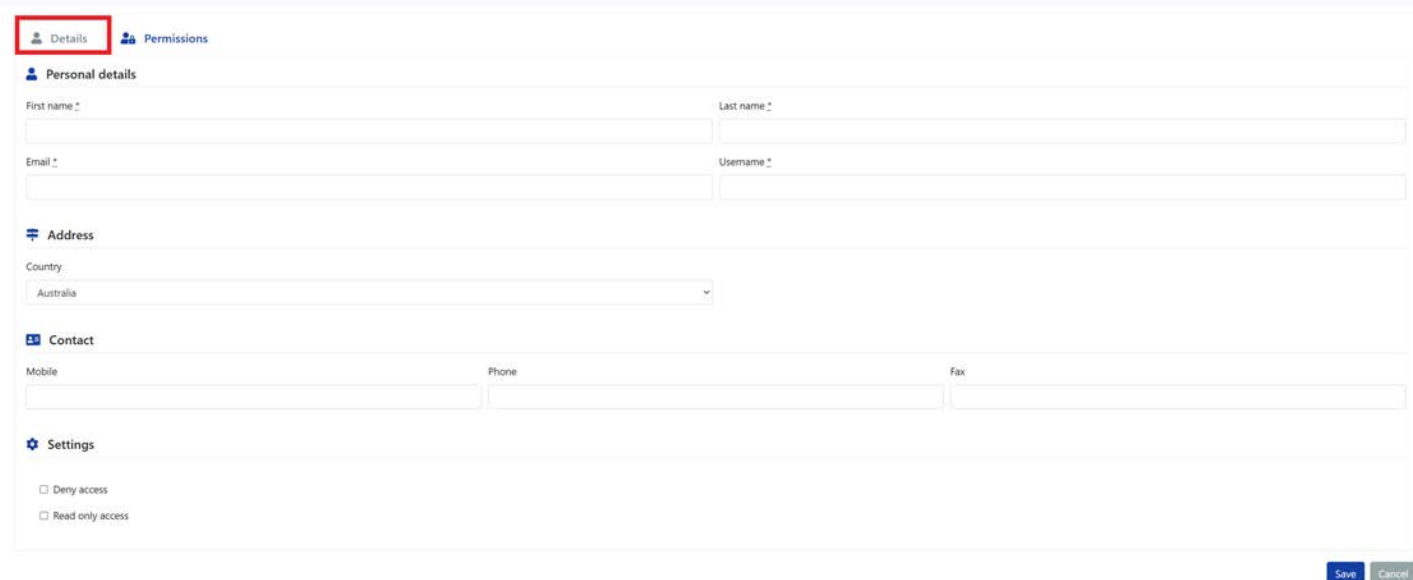
To clone an existing User, click the button **Actions** to the right of the User's name and then select **Clone** from the dropdown menu.



Username	Email	First Name	Last Name	Organisation	Status	Actions
chris.bailey	user1@trebuchet.com.au	Chris	Bailey	Trebuchet Training	Active	Actions
ern.bell	user2@trebuchet.com.au	Erin	Bell	Trebuchet Training	Active	Edit, Delete, Clone
jane.smith	jamesb+adminuser@catapulteducation.com.au	Jane	Smith	Trebuchet Training	Active	Clone
jane.user	jdoe@trebuchet.com.au	Jane	Doe	Trebuchet Training	Active	Actions

This will open up in a new screen where you can add the new User's **Details**.

Clone user permissions



Details
Permissions

Personal details

First name *
Last name *

Email *
Username *

Address

Country
Australia

Contact

Mobile
Phone
Fax

Settings

☐ Deny access
☐ Read only access

Save
Cancel

Next, you can edit the **Address**. This section lets you select which **country** your User is based in. To do this, select the country from the dropdown menu. If your team are all in the one location, you won't need to update this.

Address

Country

Australia



Below that you will see some text fields where you can add Contact details for the User. This can be useful for contacting the User if they work remotely.

Contact

Mobile

Phone

Fax

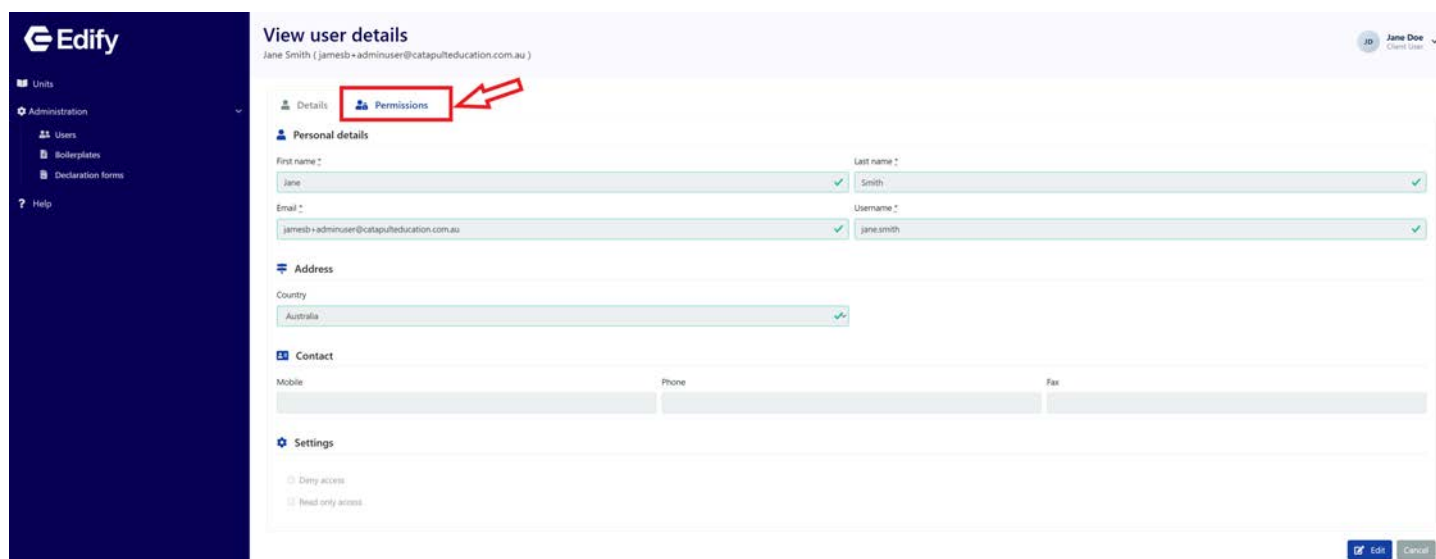
After that you will see **Settings**. This section is where you can **Deny access** or allow **Read Only** access for a User. **Denying access** can be a useful if you need to temporarily **restrict access** for a User, but do not want to delete them. **Read Only** access can be a good option if you have a team member who needs to review the content, but does **not require access to edit** the content. **Check the box** next to each of the settings to enable them for the User.

Settings

☐ Deny access

☐ Read only access

Once you have filled out all the necessary information on this page, click the Permissions tab at the top of the page to open the permission settings.



Edify

Units

Administration

- Users
- Boilerplates
- Declaration forms

Help

View user details

Jane Smith (jamesb+adminuser@catapulteducation.com.au)

Details **Permissions**

Personal details

First name : Jane ✓

Last name : Smith ✓

Email : jamesb+adminuser@catapulteducation.com.au ✓

Username : jane.smith ✓

Address

Country

Australia ✓

Contact

Mobile

Phone

Fax

Settings

☐ Deny access

☐ Read only access

Go Cancel

Here you can update the permissions to suit the User you are creating. When you expand **Permissions**, you will see a list of all the permissions for the User. The permissions with a **tick** next to them are **enabled**. Click the checkbox again to **un-tick** and **disable** the permission for the User. For a detailed breakdown of permissions, access the **Catapult Knowledge Base** and search **An Overview of Edify Permissions** or click [here](#).

Details
Permissions

User

- ☒ Can view other user details
- ☒ Can clone user permissions
- ☒ Can create a new user
- ☒ Can disable users
- ☒ Can update existing users

Assessment Zone Content

- ☒ Can create/update assessment questions/tasks in a resource
- ☒ Can delete assessment questions/tasks in a resource
- ☒ Can rearrange questions/tasks

Boilerplate/saved declaration forms

- ☒ Access to standard boilerplates/saved declaration forms
- ☒ Can create new boilerplates/saved declaration forms
- ☒ Can delete boilerplates/saved declaration forms
- ☒ Can update boilerplates/saved declaration forms

Learning Resource Zone

- ☒ Can access learning resources
- ☒ Can clone existing sections/topics
- ☒ Create learning resources/topics
- ☒ Can rename and disable the learning resources/topics

Resources

- ☒ Can View Resource Listing
- ☒ Has permission to clone a resource
- ☒ Can create a new NRT Resource
- ☐ Can archive a resource
- ☐ Search
- ☒ Can change resource state
- ☒ Can create non NRT resources

Online Assembly Area

- ☒ Can Access Online Assembly Area
- ☒ Can add new | update sections for online
- ☒ Can Customise Left-Hand menu bar of the unit
- ☐ Can update the home page background

Media Library

- ☒ Can access the media library
- ☒ Can upload new files in the media library

Learning Material Zone Content

- ☒ Can create/update learning resource components/blocks in a resource
- ☒ Can delete learning resource components/blocks in a resource
- ☒ Can rearrange learning resource components/blocks

Assessment Zone

- ☒ Can View Assessment zone for a resource
- ☒ Can clone existing section
- ☒ Can create/update assessment sections in a resource
- ☒ Can delete an assessment section in a resource
- ☒ Can rearrange sections

Supporting Info

- ☒ Can View supporting info for a resource
- ☒ Can clone existing section
- ☒ Can create/update supporting info sections in a resource
- ☒ Can delete an supporting info section in a resource

History

- ☒ View access history of account

Save
Cancel

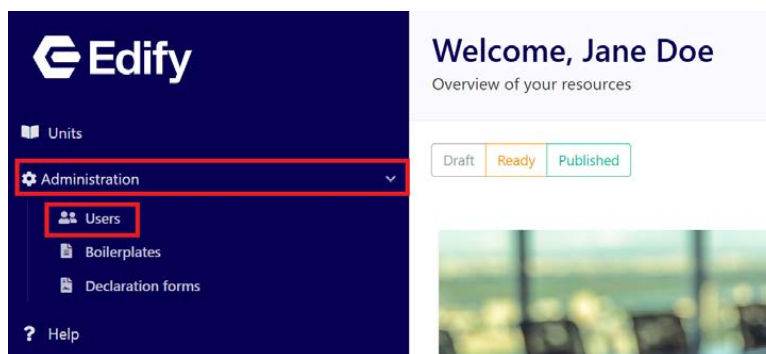
Once you have set all the relevant permissions, click, **Save**. Once Saved, a **Confirmation Email** will be sent to the **New User** containing a unique link they can use to activate their account and set their password.

Warning!

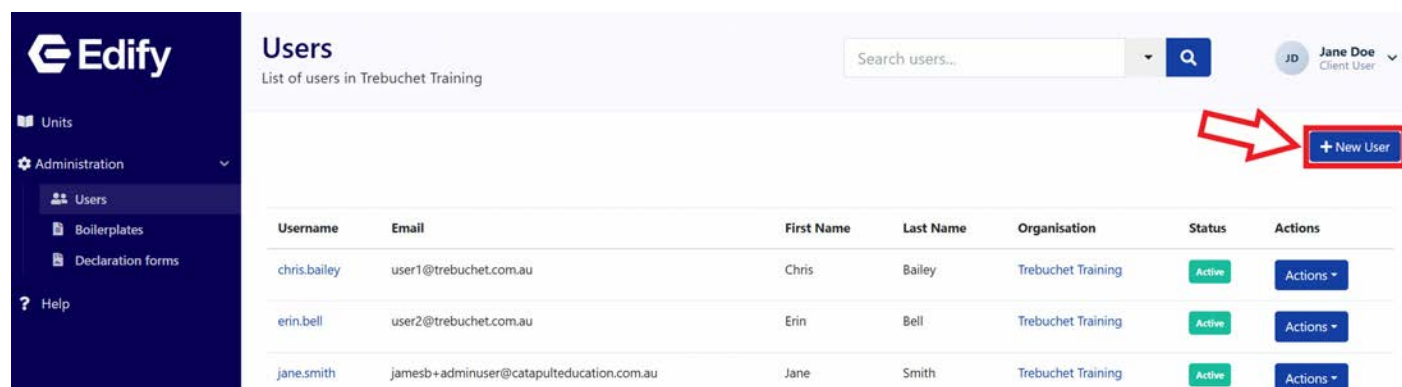
When creating or cloning a User, be careful to check that they are only receiving the permissions required for their role.

Creating New Users from Scratch

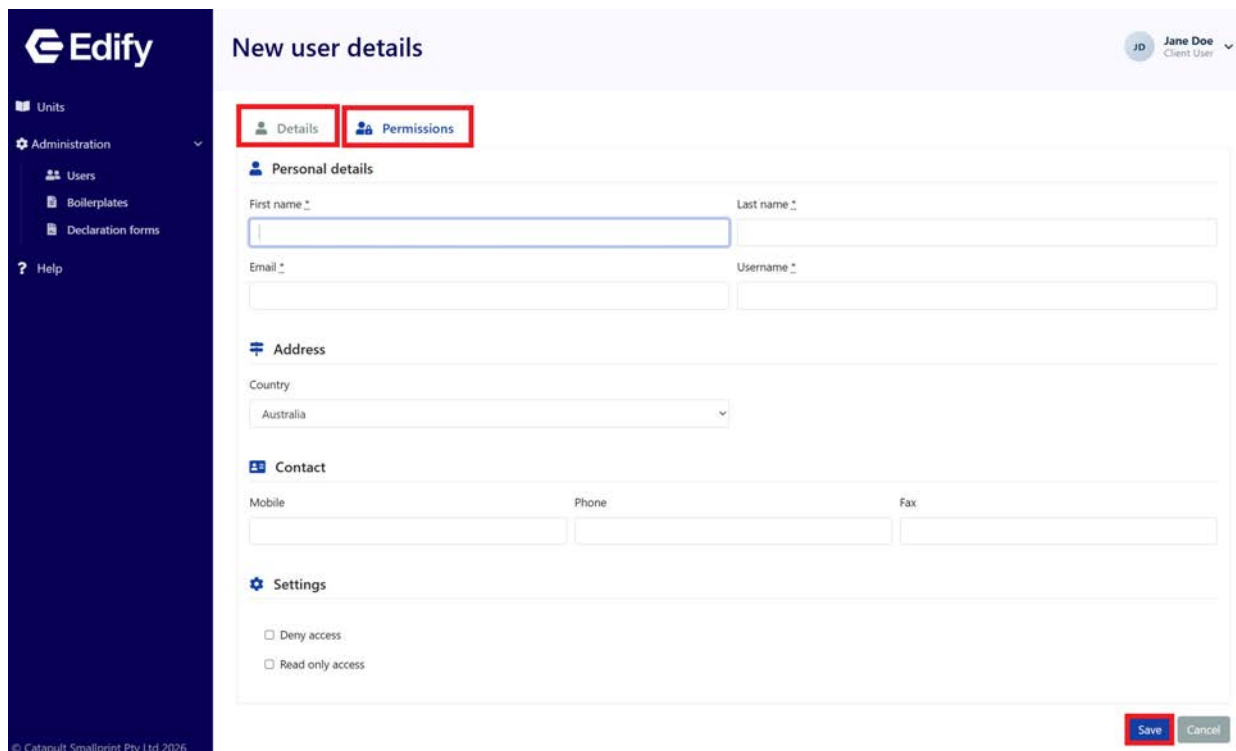
To create a New User from scratch, first, go to the **Administration Menu** on the Left-side Menu and select **Users**.



From the Users screen, click blue **New User** button at the top right of the screen.



Complete the **User Details** and **Permissions** as you did in the previous section for **Cloning an Existing User**. You will need to manually enable all relevant permissions.


 A screenshot of the 'New user details' form. The sidebar shows 'Administration' > 'Users' selected. The form has two tabs: 'Details' (active) and 'Permissions'. The 'Details' tab contains sections for:

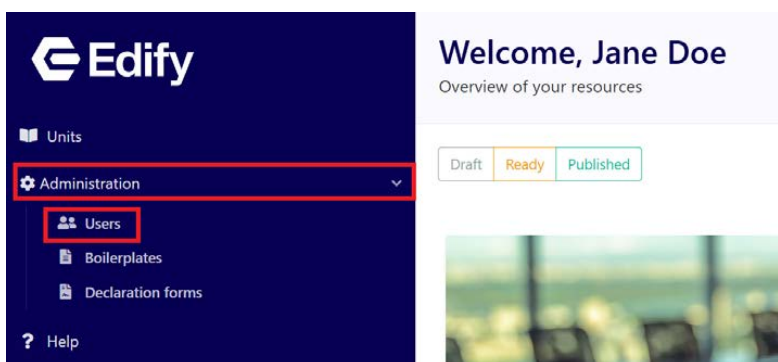
- Personal details:** First name, Last name, Email, Username.
- Address:** Country (dropdown menu showing 'Australia').
- Contact:** Mobile, Phone, Fax.
- Settings:** Checkboxes for 'Deny access' and 'Read only access'.

 At the bottom right are 'Save' and 'Cancel' buttons.

Click, **Save**. Once Saved, a **Confirmation email** will be sent to the **New User** containing a unique link they can use to activate their account and set their password.

Editing Users

Editing a User allows you to update their details and permissions. To edit a User, go to the **Administration Menu** on the Left-side Menu and select **Users**.



Using the dropdown menu under **Actions** to the right of the User, select **Edit**.

Users
List of users in Trebuchet Training

Search users...

Jane Doe Client User

Username	Email	First Name	Last Name	Organisation	Status	Actions
chris.bailey	user1@trebuchet.com.au	Chris	Bailey	Trebuchet Training	Active	Actions v
erin.bell	user2@trebuchet.com.au	Erin	Bell	Trebuchet Training	Active	Edit Delete Clone
jane.smith	jamesb+adminuser@catapulteducation.com.au	Jane	Smith	Trebuchet Training	Active	

The **User Edit** screen will open. You can then make your necessary edits to the User. (Note that editing the email address will send a confirmation email.) Make sure to click **Save** when done.

Editing user details
Chris Bailey, chris.bailey, user1@trebuchet.com.au

Jane Doe Client User

Personal details

First name Last name

Email Username

Address

Country

Contact

Mobile Phone Fax

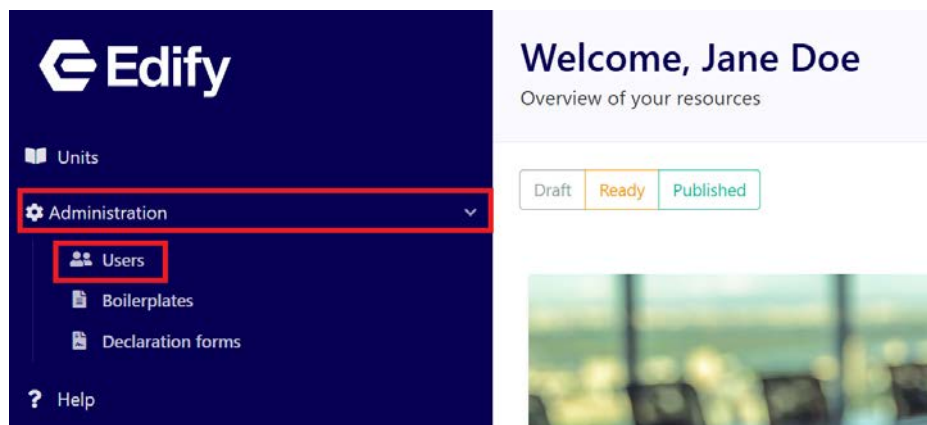
Settings

☐ Deny access
☐ Read only access

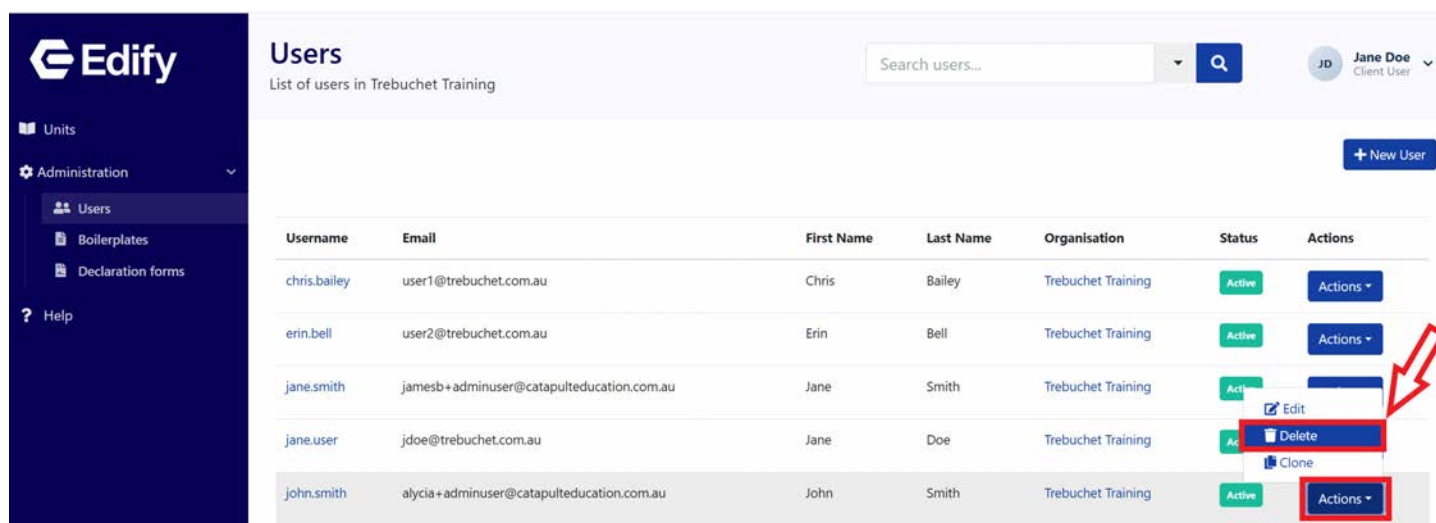
Deleting Users

Deleting a User revokes their access to the system. Only a User with the required **Permissions** can delete another User. You **cannot** delete yourself or the organisation's final User, you will need to contact the Catapult team to disable your account. Once deleted, the User will **no longer have access to the system**. This may be necessary if a User has left your organisation or has move to a different role where they do not require access to Edify.

To delete a User, go to the **Administration Menu** on the left side and select **Users**.



This will bring up the list of **Users** within your Edify account. Click **Actions** next to the User you wish to Delete and then select **Delete** from the dropdown menu.



Once you have clicked **Delete**, the **User will disappear** from the list and a **pop-up message** will appear at the top of the screen, similar to the screenshot below.

User John Smith was successfully destroyed.



Tip!

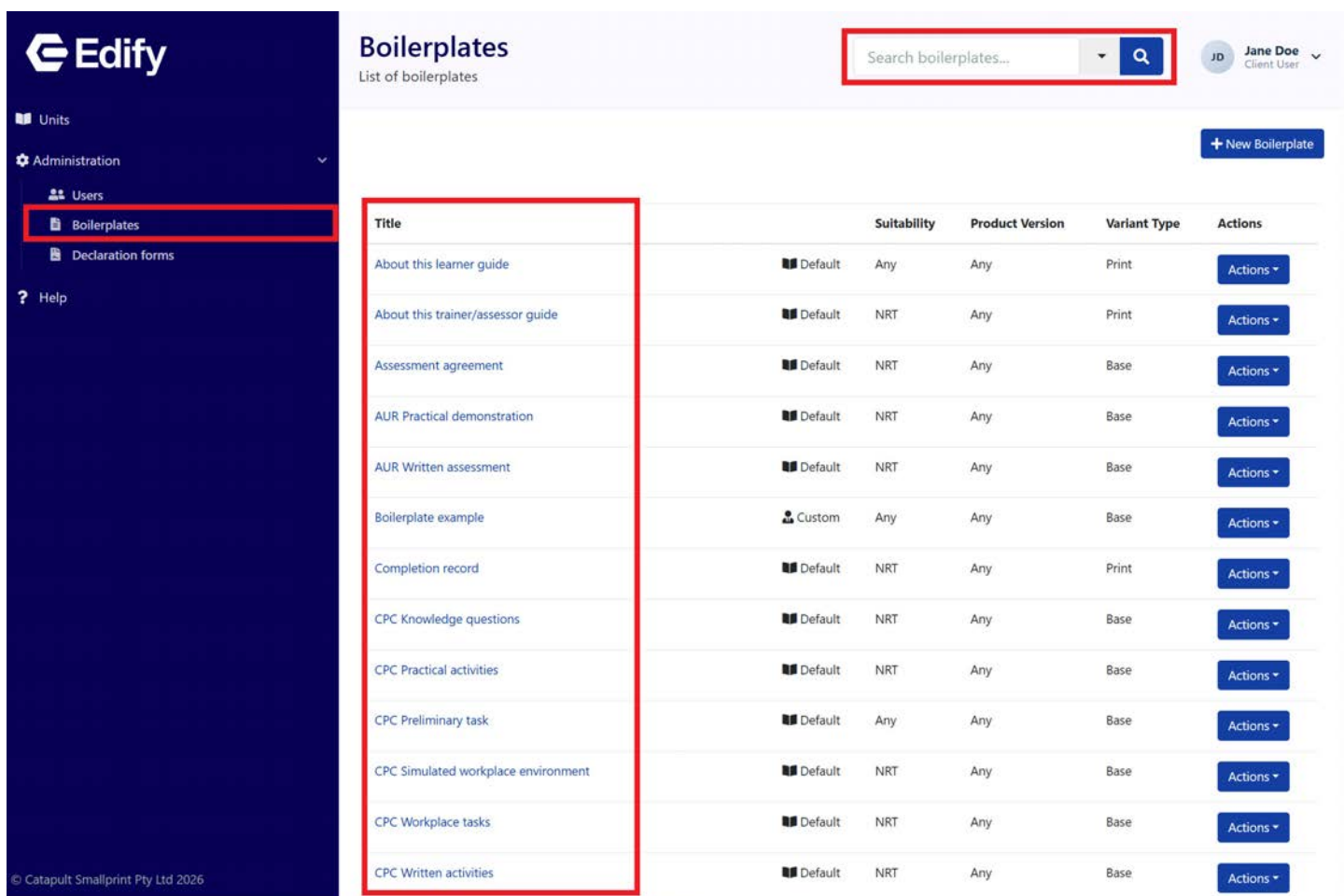
Deleted Users are not completely removed from Edify. The User can be restored by the Catapult team if needed.

Boilerplates

Another feature of Edify is Boilerplates. Boilerplates are used as pre-written Assessment introductions and instructions for your Assessments and Supporting Info sections to save time when the same instructions will be given for multiple Units. Boilerplates can be reused across your Units by building them in the Boilerplate library and then applying them in the Assessment and Supporting Info sections inside your Units. The Boilerplates library will contain both **Default Boilerplates** (Boilerplates created by Catapult that are used in our standard product) and **Custom Boilerplates** (any Boilerplates created by your organisation).

To **view** a Boilerplate, simply **click the Title** and it will open in a new page.

If you cannot find the boilerplate that you are looking for, use the **Search bar** at the top of the page to search the Title. You can also search by **Key word** or **Suitability** by using the **dropdown arrow**.



The screenshot shows the Edify interface for managing boilerplates. On the left is a dark blue sidebar with navigation links: Units, Administration, Users, **Boilerplates** (highlighted with a red box), Declaration forms, and Help. The main content area is titled 'Boilerplates' with a subtitle 'List of boilerplates'. At the top right of the main area is a search bar labeled 'Search boilerplates...' with a dropdown arrow and a search icon (highlighted with a red box). Below the search bar is a '+ New Boilerplate' button. The main area contains a table of boilerplates with the following columns: Title, Suitability, Product Version, Variant Type, and Actions. The 'Title' column is highlighted with a red box. The table lists 14 boilerplates, including 'About this learner guide', 'About this trainer/assessor guide', 'Assessment agreement', 'AUR Practical demonstration', 'AUR Written assessment', 'Boilerplate example', 'Completion record', 'CPC Knowledge questions', 'CPC Practical activities', 'CPC Preliminary task', 'CPC Simulated workplace environment', 'CPC Workplace tasks', and 'CPC Written activities'. Each row has an 'Actions' button with a dropdown arrow.

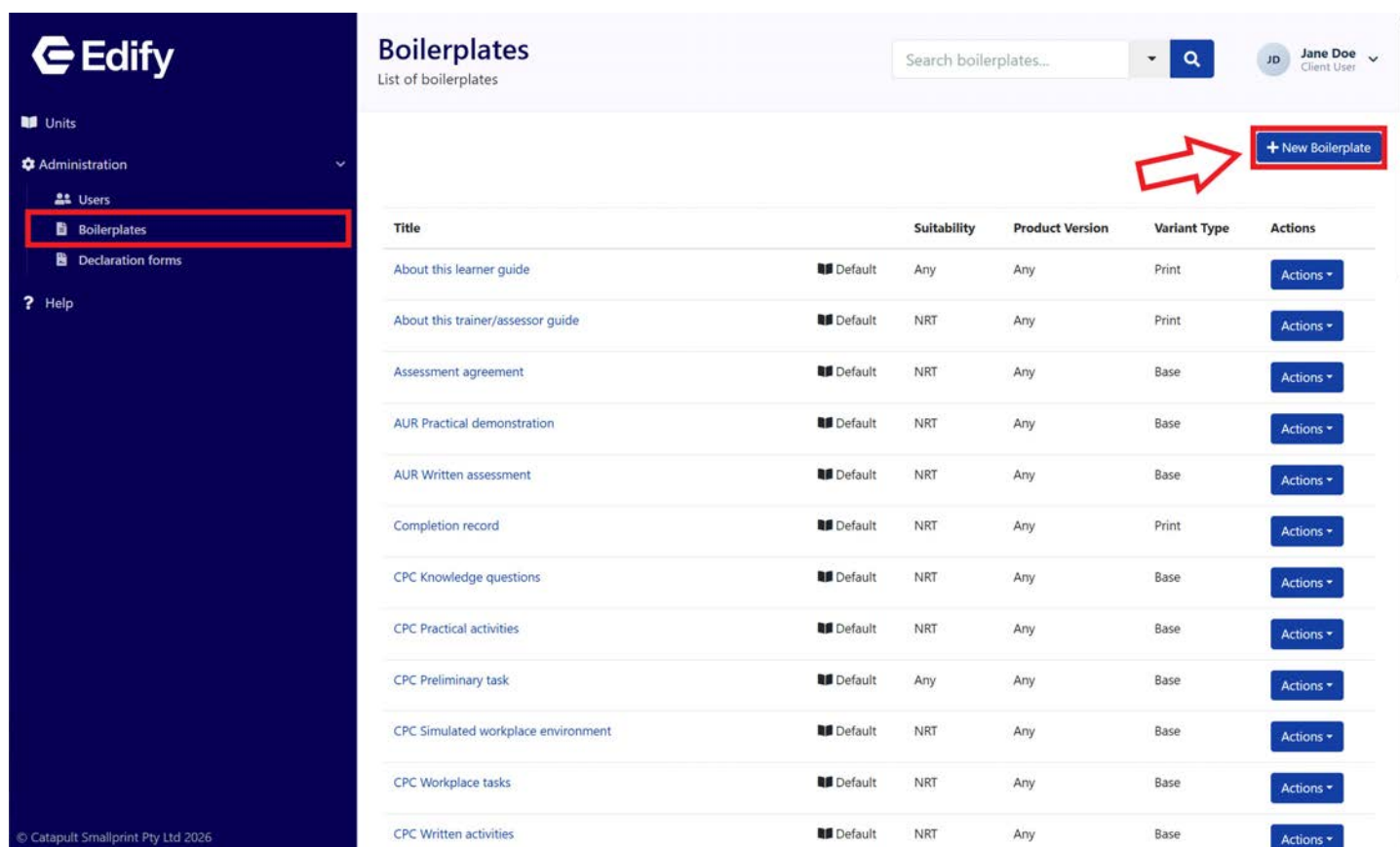
Title	Suitability	Product Version	Variant Type	Actions
About this learner guide	Default	Any	Print	Actions
About this trainer/assessor guide	Default	NRT	Print	Actions
Assessment agreement	Default	NRT	Base	Actions
AUR Practical demonstration	Default	NRT	Base	Actions
AUR Written assessment	Default	NRT	Base	Actions
Boilerplate example	Custom	Any	Base	Actions
Completion record	Default	NRT	Print	Actions
CPC Knowledge questions	Default	NRT	Base	Actions
CPC Practical activities	Default	NRT	Base	Actions
CPC Preliminary task	Default	Any	Base	Actions
CPC Simulated workplace environment	Default	NRT	Base	Actions
CPC Workplace tasks	Default	NRT	Base	Actions
CPC Written activities	Default	NRT	Base	Actions

Creating Boilerplates

Creating a new Boilerplate allows you to create a Boilerplate with your own content. You may wish to create one to cover an Assessment introduction or a set of instructions that are repeated across multiple units.

To create a Boilerplate, select **Boilerplates** from the **Administration** menu on the Left-side Menu..

You will see a list of Default boilerplates. At the top right of the screen you will see a blue button that says **+ New Boilerplate**. Click the button to create a new Boilerplate.



Boilerplates
List of boilerplates

Search boilerplates...

JD Jane Doe Client User

+ New Boilerplate

Title	Suitability	Product Version	Variant Type	Actions
About this learner guide	Default	Any	Print	Actions
About this trainer/assessor guide	Default	NRT	Print	Actions
Assessment agreement	Default	NRT	Base	Actions
AUR Practical demonstration	Default	NRT	Base	Actions
AUR Written assessment	Default	NRT	Base	Actions
Completion record	Default	NRT	Print	Actions
CPC Knowledge questions	Default	NRT	Base	Actions
CPC Practical activities	Default	NRT	Base	Actions
CPC Preliminary task	Default	Any	Base	Actions
CPC Simulated workplace environment	Default	NRT	Base	Actions
CPC Workplace tasks	Default	NRT	Base	Actions
CPC Written activities	Default	NRT	Base	Actions

Firstly, you will need to choose the Suitability:

NRT - This boilerplate can only be used for Units created as an NRT Unit.

Non NRT - This boilerplate can only be used for Units created as a non-NRT Unit.

Any - This can be used for both NRT and Non-NRT Units.

Select your option and click **Save**.



New boilerplate

Boilerplate name

Suitability *

☐ NRT
☐ Non NRT
☐ Any

Save **Cancel**

Once you have filled these out, click **Save**.

Your new Boilerplate has now been created and can be applied to a **Section** by choosing the option **Boilerplate** from the dropdown menu when selecting a **Section description**.

Editing Boilerplates

You can edit your existing boilerplates under Boilerplates on the Left-side Menu. You may need to edit a Boilerplate if you need to update an existing boilerplate's text or type.

To edit a Boilerplate, click the **Actions** button to the right of your Boilerplate title and select **Edit** from the dropdown menu. It will then open your Boilerplate in a new page where you can edit it.

Boilerplates

List of boilerplates

JD

Jane Doe

Client User

Boilerplate 'Boilerplate example' was successfully created.

+ New Boilerplate

Title		Suitability	Product Version	Variant Type	Actions
About this learner guide	Default	Any	Any	Print	Actions ▾
About this trainer/assessor guide	Default	NRT	Any	Print	Actions ▾
Assessment agreement	Default	NRT	Any	Base	Actions ▾
AUR Practical demonstration	Default	NRT	Any	Base	Actions ▾
AUR Written assessment	Default	NRT	Any	Base	Actions ▾
Boilerplate example	Custom	Any	Any	Base	Actions ▾ Edit Delete
Completion record	Default	NRT	Any	Print	Actions ▾
CPC Knowledge questions	Default	NRT	Any	Base	Actions ▾

[Boilerplates/144/edit](#)

You can then make any required changes and click **Save** to update the Boilerplate.

Note:

Changing the Unit Type field may change the behaviour of the existing Boilerplate where it is in use. We strongly suggest reviewing all Units where the boilerplate has been used to verify they are working as intended.

The Title and Suitability of Default Boilerplates cannot be changed.

Deleting Boilerplates

Deleting a Boilerplate **permanently removes** it from your Boilerplate library. Deleted Boilerplates **cannot** be restored. Only Delete a Boilerplate if it was created in **error** or it has been **replaced** with a new version. If the Boilerplate is in use in any Units, it can only be deleted **after** it has been replaced in all affected Units.

To delete a Boilerplate, Click the **Actions** button to the right of the Boilerplate title.

Boilerplates					
List of boilerplates					
Search boilerplates...				JD Jane Doe Client User	
Completion record	Default	NRT	Any	Print	Actions
CPC Knowledge questions	Default	NRT	Any	Base	Actions
CPC Practical activities	Default	NRT	Any	Base	Actions
CPC Preliminary task	Default	Any	Any	Base	Actions
CPC Simulated workplace environment	Default	NRT	Any	Base	Actions
CPC Workplace tasks	Default	NRT	Any	Base	Actions
CPC Written activities	Default	NRT	Any	Base	Actions
Foundation skills checklist	Default	NRT	V5 V6	Print	Actions
How will my competency be assessed?	Default	NRT	V5	Print	Actions
How will my competency be assessed? (CERTIFY)	Default	NRT	Certify	Print	Actions
How will my competency be assessed? (V6)	Default	NRT	V6	Print	Actions
Instructions	Custom	Any	Any	Base	Actions
Instructions and agreement	Default	NRT	Any	Print	Edit Delete
Knowledge questions	Default	NRT	Any	Base	Actions
Learning material	Default	NRT	Any	Print	Actions

From the dropdown menu, select **Delete**. If the Boilerplate is not in use in any Units, this will **immediately** delete the Boilerplate, there will be **no** confirmation step. A green notification will appear at the top of the screen to confirm the action. An example is shown below:

Boilerplates

List of boilerplates

Search boilerplates...

Q

JD

Jane Doe

Client User

Boilerplate boilerplate example was successfully destroyed.

X

+ New Boilerplate

Title		Suitability	Product Version	Variant Type	Actions
About this learner guide	Default	Any	Any	Print	Actions

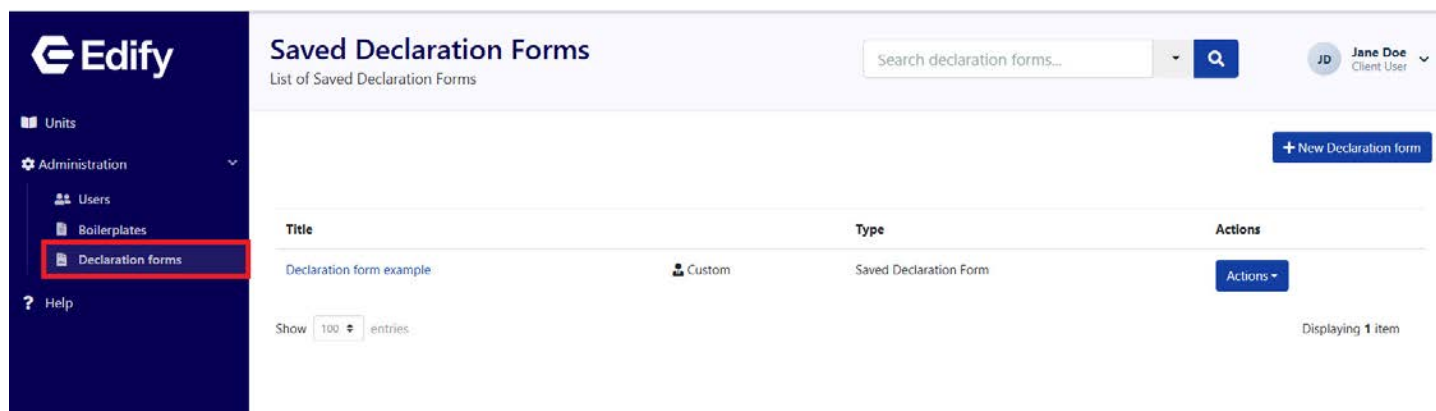
Note:

Default Boilerplates cannot be deleted. Only custom Boilerplates can be Deleted.

Declaration Forms

Declaration forms manages all declaration forms for your organisation. It lets you view, **create and edit forms** that can be added to future Units. Each form has a Title, Introductory text and Declaration items that appear as check boxes to the learner. You will find all of your saved Declaration forms here.

To access the Declaration forms, go to the **Administration Menu** on the left side and select **Declaration forms**.



Edify

Saved Declaration Forms
List of Saved Declaration Forms

Search declaration forms...

JD Jane Doe Client User

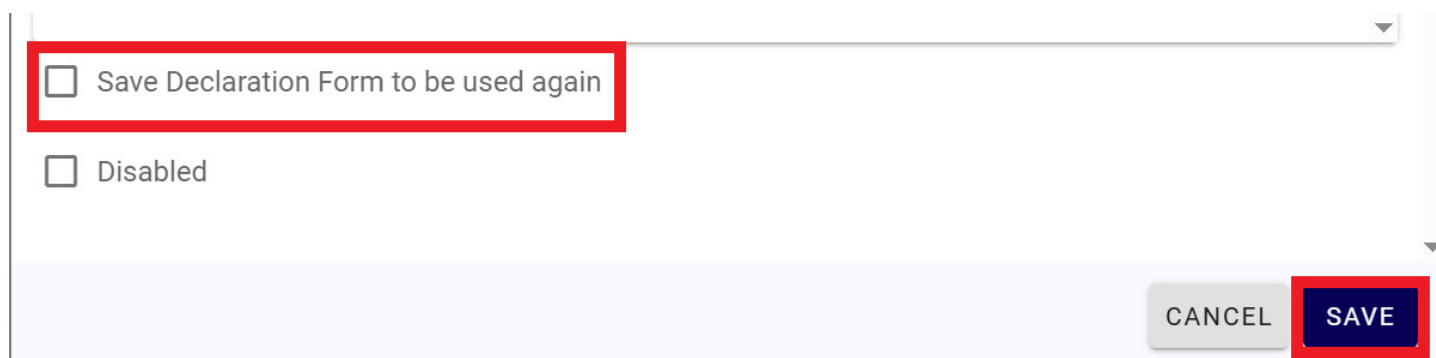
+ New Declaration form

Title	Type	Actions
Declaration form example	Custom	Saved Declaration Form

Show 100 entries

Displaying 1 item

Declaration forms can also be created while working in a Unit's Online Variant by selecting **Save Declaration Form to be Used Again**. That saved form then appears in the list on the Saved Declaration forms page.



☐ Save Declaration Form to be used again

☐ Disabled

CANCEL SAVE

More information about creating Declaration forms in a Unit's assessment can be found in our [Assessment Builder User Manual](#).

Note:

This tab manages the *templates*, not learners' completed declarations.

Declaration forms can be created and saved when creating your unit, but they can also be created directly in the Declaration forms section. This can be useful if you want to prepare a Declaration form in advance that will be used across multiple units so it can simply be applied when creating the unit to save time.

Saved Declaration Forms

List of Saved Declaration Forms

JD Jane Doe Client User

+ New Declaration form

Title	Type	Actions
Declaration form example	Custom	Saved Declaration Form
		Actions

Show 100 entries

Displaying 1 item

New Declaration Form

JD

Jane Doe

Client User

Title *

Declaration Intro *

↶ ↷ Paragraph ▾ B I [Table Icon] [List Icon] [List Icon] [List Icon] [List Icon] [List Icon] [List Icon] [List Icon] [List Icon] [List Icon]

p

0 words

Declaration items

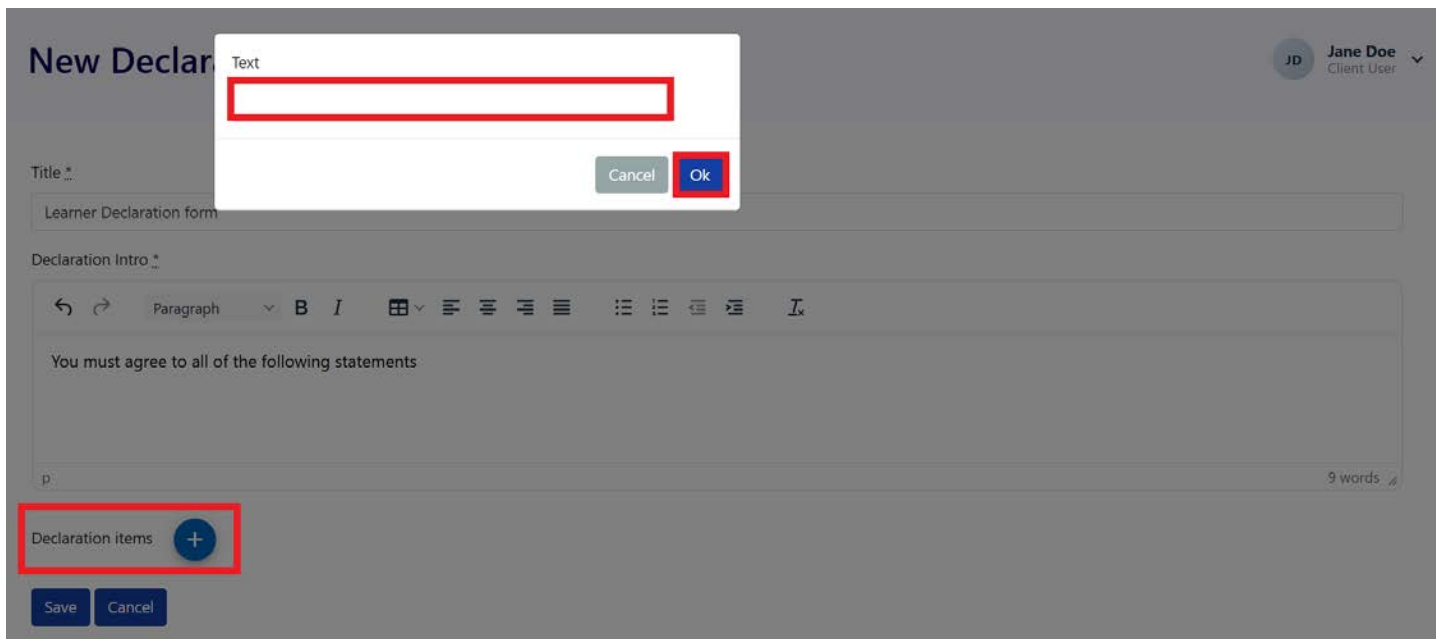
+

Save

Cancel

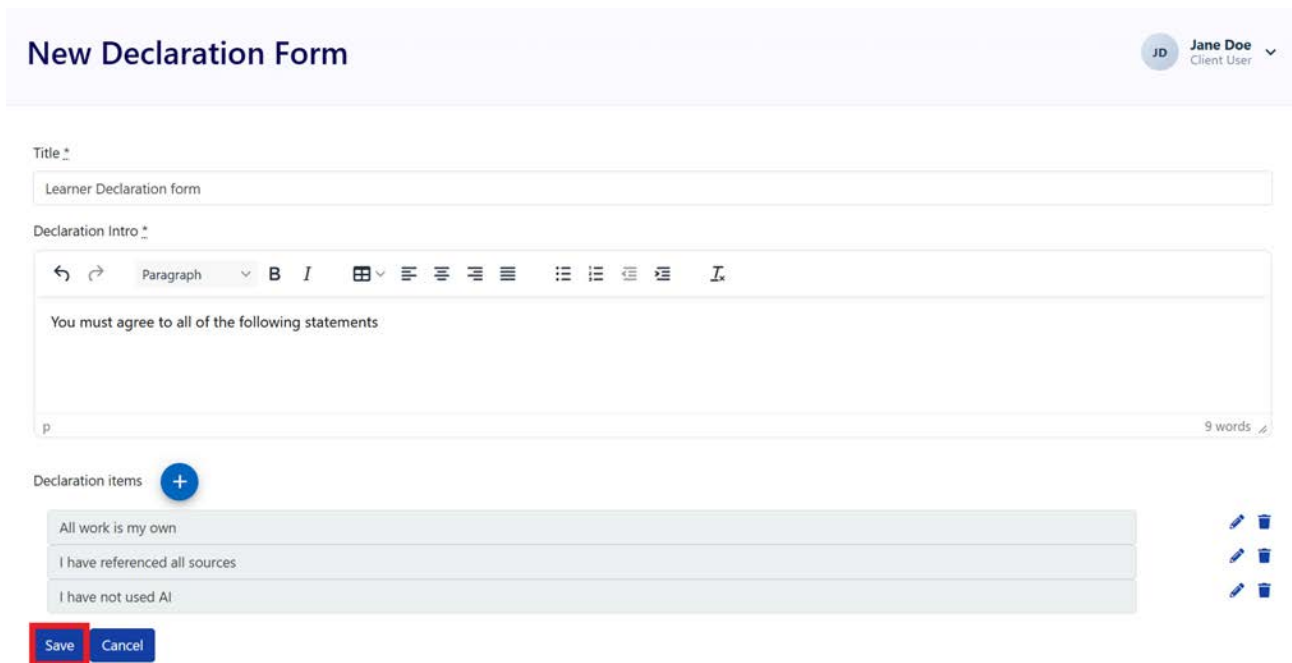
Add the **Title** and **Introduction** into the provided **Text** fields.

To add Declaration items, click the **+ Declaration items** button and type your item into the pop-up window and click **OK**.



The screenshot shows the 'New Declaration' form. A text input pop-up is open, with a red box around the input field and the 'Ok' button. The form fields include 'Title' (containing 'Learner Declaration form'), 'Declaration Intro' (containing 'You must agree to all of the following statements'), and 'Declaration items' (with a red box around the '+ Declaration items' button). The 'Save' and 'Cancel' buttons are at the bottom.

Once you have finished adding your Declaration items, click **Save** to save your Declaration form.



The screenshot shows the 'New Declaration Form' with three declaration items added: 'All work is my own', 'I have referenced all sources', and 'I have not used AI'. The 'Save' button is highlighted with a red box. The 'Declaration Intro' field contains the text 'You must agree to all of the following statements'.

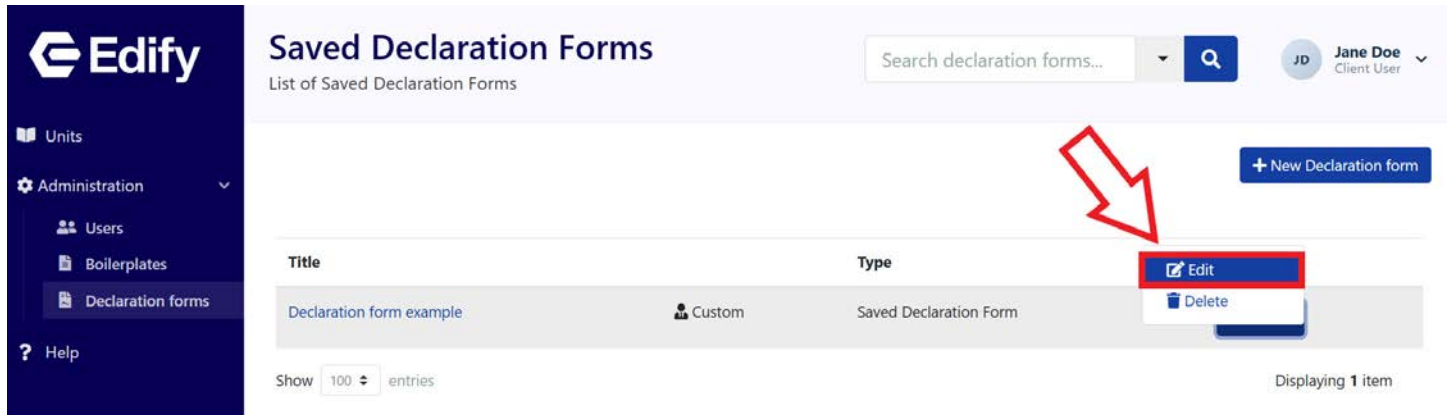
Note:

Only add Declaration items you want Learners to agree to as *all* items must be agreed to in order for the Learner to submit the form.

Editing Declaration Forms

The Saved Declaration forms page also allows you to edit your pre-existing Declaration forms. This can be a great way to make an update to a form used across your library in multiple units in one go.

To edit the form, click the **Actions** button to the right of the form title on the list and then select **Edit**.



Edify

Saved Declaration Forms
List of Saved Declaration Forms

Search declaration forms... 

JD Jane Doe Client User

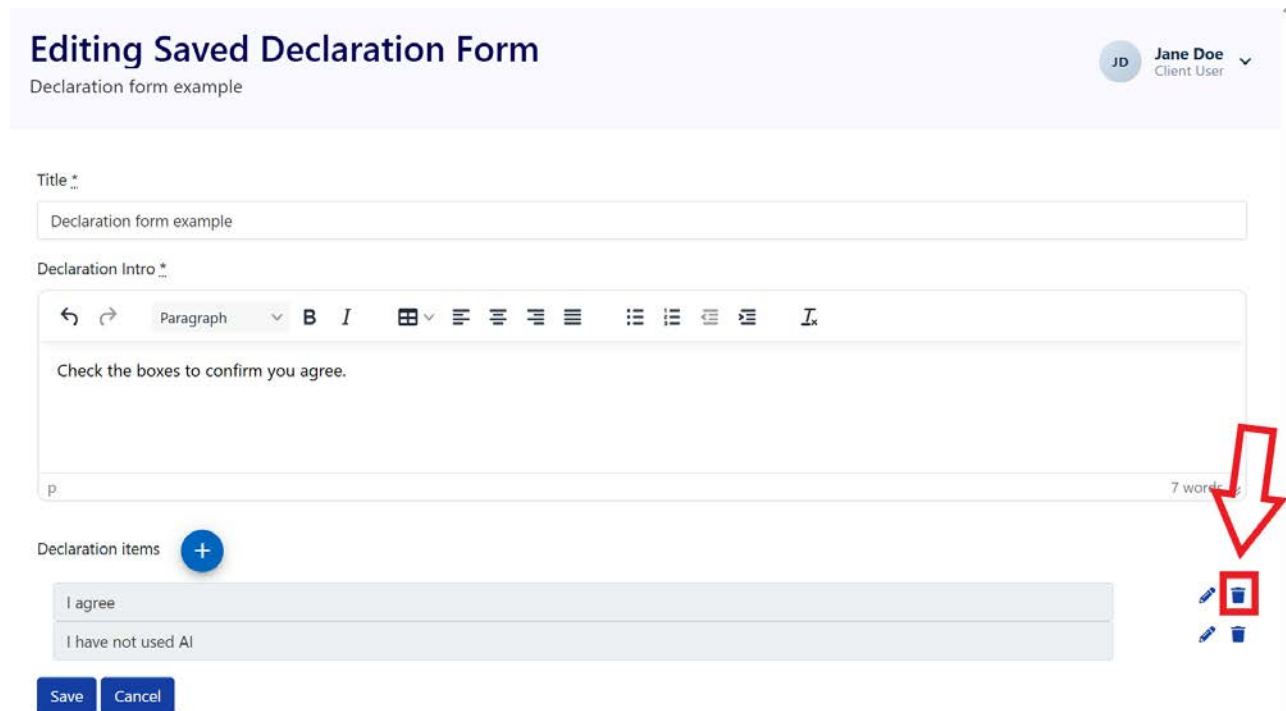
+ New Declaration form

Title	Type	Actions
Declaration form example	Custom	 Edit  Delete

Show 100 entries

Displaying 1 item

You can also delete Declaration Items by clicking the Trash icon to the right of the Item you wish to delete.



Editing Saved Declaration Form
Declaration form example

JD Jane Doe Client User

Title *

Declaration form example

Declaration Intro *

Check the boxes to confirm you agree.

p 7 words

Declaration items +

- I agree
- I have not used AI

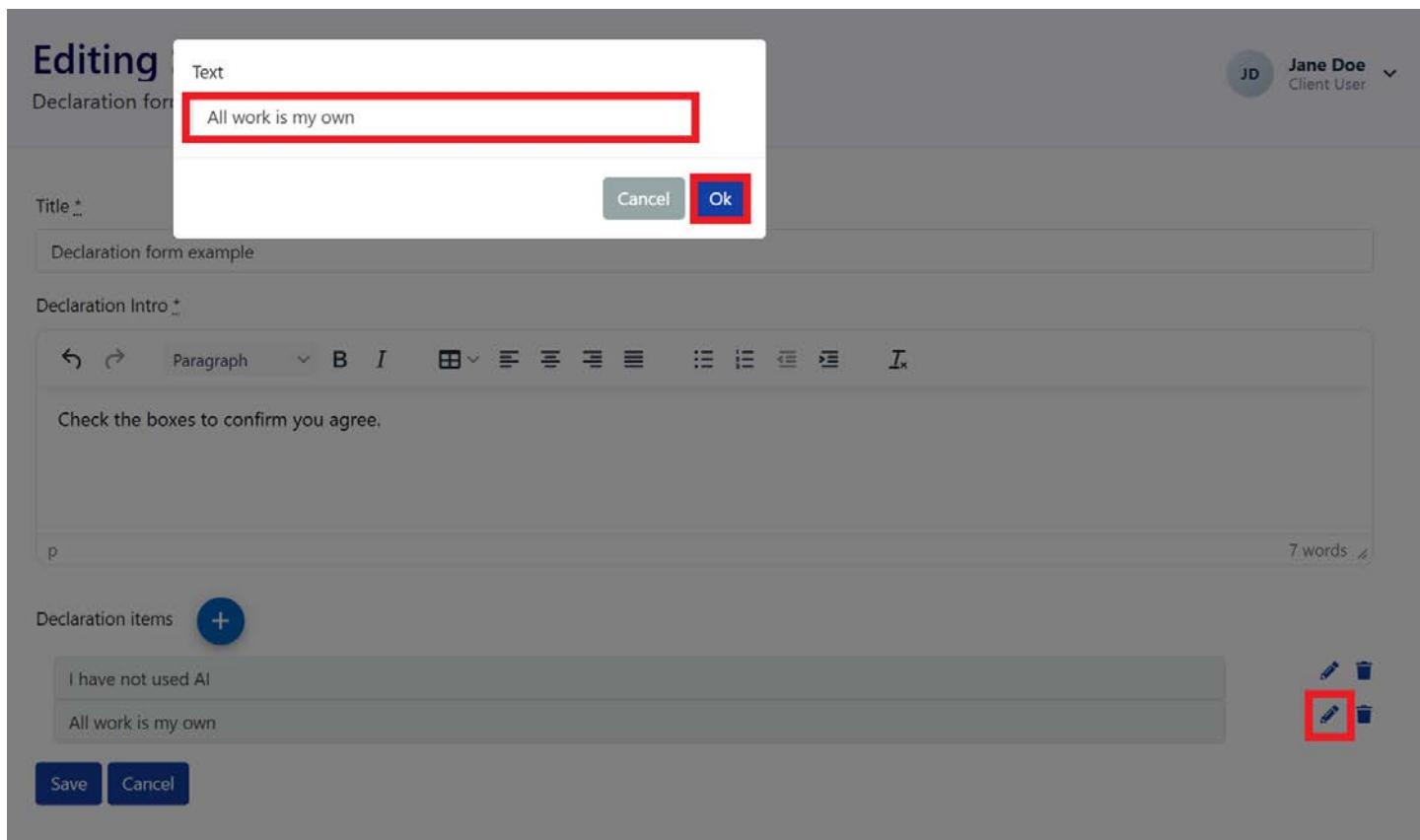
Save Cancel



Note:

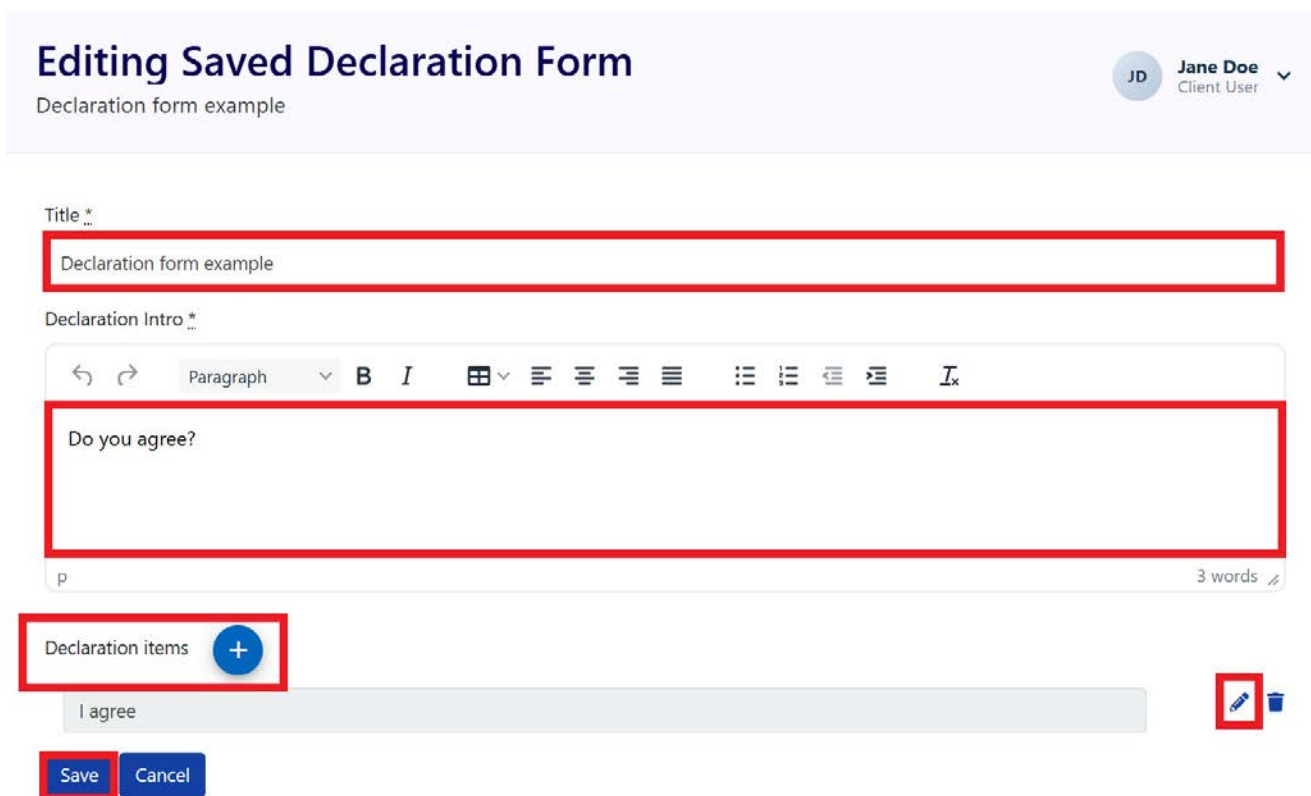
Take care when editing a saved Declaration forms as any changes to an existing template will affect Units already using it.

If you need to change or rearrange **Declaration Items**, you will need to edit them using the **edit pencil icon**. Once you are done, click **OK** to save the changes.



Text fields can be edited by **typing** and using the toolbar features. You can also **add** additional Declaration items by clicking the **Declaration Items +** button.

Once you have made your edits, click **Save**.



Deleting Declaration Forms

Deleting a Declaration form will remove it from the list. Only delete a Declaration form if you are certain it is no-longer required or it was saved in error, as it cannot be recovered once deleted.

To delete a Declaration form, click the **Actions** button to the right of the form title on the list and then select **Delete**.

Saved Declaration Forms

List of Saved Declaration Forms

JD **Jane Doe**
Client User

[+ New Declaration form](#)

Title	Type	Actions
Acknowledgement of the commencement of training	Custom	Actions Edit Delete
Student acknowledgement	Custom	

Show entries

Displaying all 2 items

If the form is **not in use** in a Unit, this will **immediately** delete the form. You will receive a **confirmation** notice in a green box at the top of the screen to confirm it has been destroyed.

Saved Declaration Forms

List of Saved Declaration Forms

JD **Jane Doe**
Client User

Template acknowledgement of the commencement of training was successfully destroyed.
 X

[+ New Declaration form](#)

Title	Type	Actions
Student acknowledgement	Custom	Actions

Show entries

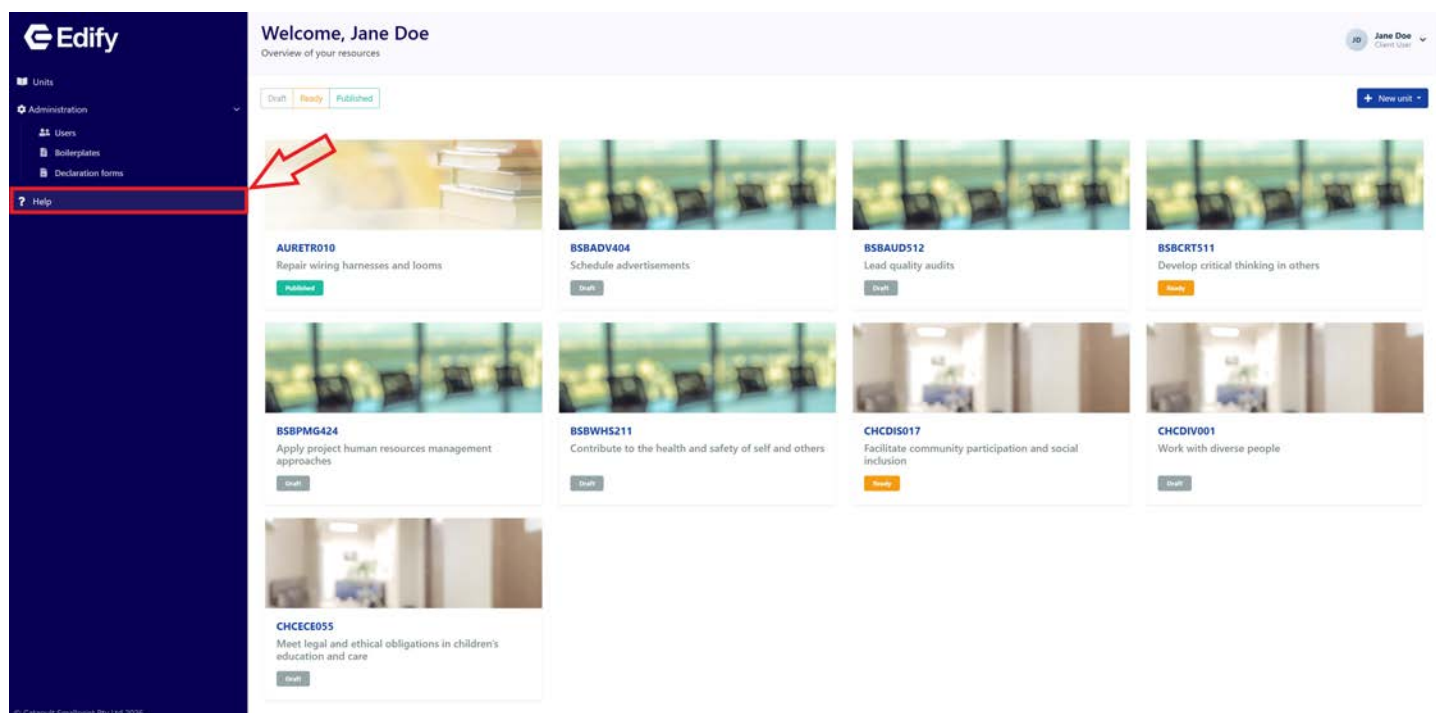
Displaying 1 item

Note:

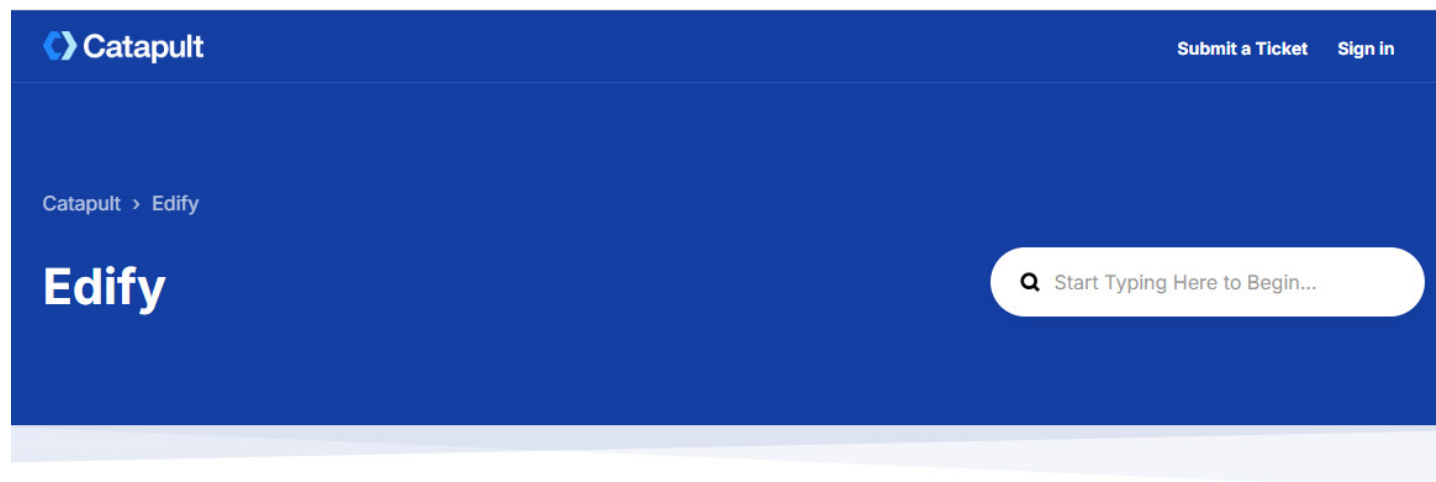
Edify blocks deletion if the form is attached to any Units. To delete a Declaration form that has been used in your Units, it must first be removed from all Units in which it appears. Proceed only if you are certain it is no longer required as deleted forms *cannot* be retrieved.

Help

On the Main Navigation Menu, you will see at the bottom of the list the option **Help**. Click Help to open a direct link to the **Catapult Knowledge Base**.



The Catapult Knowledge Base (pictured below) is a **resource hub** for videos, articles and instruction manuals for using the Edify system. You can browse the helpful support information listed, or use the Search bar to search the Knowledge Base for assistance.



Edify User Manuals

- [Edify Assessment Builder User Manual](#)

Getting Started with Contextualisation

Troubleshooting

The pages, buttons and Actions available in Edify may differ between users. If an option shown in this manual is not visible, this does not necessarily indicate a system problem. Access depends on several factors:

Factor	Effect
Subscription tier	Some features are only available to Premium organisations.
Organisation settings	Features may need to be enabled for your organisation. Contact the Catapult team to enquire about enabling a feature for your Organisation.
User permissions	Users only see actions they are authorised to perform. If you require your permissions to be updated, contact your Account Owner.
Unit status	Some actions are only available while a Unit is Draft, Ready or Published.
User Read Only Access	A read-only User can view content but cannot perform editing actions.
Unit read-only status	A Unit set as read-only can be viewed by client users but cannot be edited.
Internal-only action	Some actions can only be performed by the Catapult team. These have been highlighted in the manual.

If you believe you should have access to a Permission, contact your Account Owner. If the Account Owner cannot enable it, contact the Catapult team at:

support@catapult-elearning.com

Congratulations!
You are now an
Edify Admin
expert!



Glossary

This glossary describes the terms used by the Edify system.

A

Account Owner

The first User to be added to an Edify account.

Has all Permissions enabled except for Premium features.

Responsible for managing the organisation's Edify Users and assigning their permissions.

Actions *(System Feature)*

This menu is present alongside each Unit, User, Boilerplate and Declaration form in their respective lists.

For Units, it provides the options: Show, Clone, Mark as Ready, Set to Draft and Archive, depending on your Permissions and the Unit status.

For Users, it provides the options: Edit, Delete and Clone.

For Boilerplates and Declaration form it provides the options: Edit and Delete.

Administration Menu *(System Feature)*

The left-side navigation menu in Edify. Here you can access administrative tools, including:

- Units
- Organisation
- Users
- Boilerplates
- Declaration forms

Archived *(Status)*

A category used to designate a Unit that has been replaced or is no-longer being used.

Archived Units will no longer appear on the Units list.

Archived units can be restored by the Catapult team.

Assessment Section *(Section)*

A Section created to build an assessment.

Can be one of three Assessment Section Types; Trainer Marked, Quiz or Observations.

B

Boilerplate *(Component)*

A standardised piece of content that can be repeated across multiple Units. For example, a Knowledge Questions introduction.

A list of all Boilerplate content available to an Organisation can be accessed through the Administration menu. New Boilerplate content can be added through this page.

Boilerplate can be used in the description of a Section. This functions as the introductory text to an Assessment Section or as its own page of content for a Supporting Info Section.

Boilerplates can be set to be used in only NRT Units, Non-NRT Units, or both types of Units.

They contain:

- A title—a label used to distinguish the Boilerplate in Edify, it does not appear in the LMS
- Introduction text—visible above the **show more/less** link in the LMS
- Main body text—visible after clicking the **show more** link in the LMS

C

Catapult Library

The library of Units provided by Catapult.

Units from the Catapult library can be added to your Edify library for editing by sending a request to the Catapult team.

Client User

A User outside of the Catapult team.

Clone *(Action)*

Creates an identical copy of an existing Unit or User.

Cloned Units must have a unique Code (optionally an Edition Code).

Cloned Users must have the details updated to reflect the new User. Ensure Permissions are set correctly for the new User's access requirements.

Code *(Unit Information)*

The code used to identify a Unit. For example, CHCECE053.

Codes must be unique, however units may use the same Code in the same Organisation by using unique Edition Codes.

Contextualisation

Changes made by your organisation to a Unit to reflect the cohort enrolled to study.

Changes may be made to make the content industry specific and may require additional assessment tools to meet required outcomes.

Changes may be made to reflect the mode in which the learner is undertaking the study, for example, work based or simulated.

Custom Version *(Unit Information)*

A version of a unit that has been cloned from a standard Catapult unit to be edited in Edify.

A Custom version will replace the Standard Version of the Unit in your LMS library if it has the same Code and does not have an Edition Code.

Also refer to [Edition Code](#).

D

Declaration Form

A form built in the Edify system that is intended to be used by a Learner to indicate their understanding and acceptance of the assessment process.

Declaration Item

An item that the learner must check a box to agree to on a Declaration form in order to submit the form.

Delete *(Action)*

An action used to remove part of a Unit or a User from the system. Deleted Units can be recovered.

Deleted Users can be recovered by contacting the Catapult Team.

Draft *(Status)*

A Unit status when editing is in-progress.

Units with the Draft status can be edited by Users.

Draft status can be changed to Ready status when the Unit is ready for the Catapult Team to review.

E**Edify Library**

The library of Units that have been added to your Edify account to be customised or contextualised for your Organisation.

Edition Code *(Unit Information)*

An optional code used to differentiate two or more Units with the same code.

A Unit with an Edition Code may include an Edition Title.

The Edition Code will not be visible to Learners.

Also refer to [Code](#).

Edition Title *(Unit Information)*

An optional title is used to differentiate two or more Units with the same code.

A Unit with an Edition Title must include an Edition Code.

The Edition Title will be visible to Learners.

M**Mark as Ready** *(Action)*

The Action button used to change a Units status from Draft to Ready.

This button can be accessed from the top-right corner of a Unit or from the Actions Menu on the list of Units. It will only be visible as an option if the status of the Unit is set to Draft.

N**Non-NRT** *(Unit Information)*

Used to identify non-accredited training Units.

NRT *(Unit Information)*

An abbreviation for Nationally Recognised Training.

This label is used to identify accredited training Units.

O**Online** *(page)*

Also known as the Online Variant of a Unit. This is the presentation area of a Unit designed to be used in the LMS.

Changes made to the Online Variant of a Unit will need to be pushed as a new version to the LMS for the changes to be reflected in that system. In other words, changes made in Edify do not simultaneously change the Unit in the Catapult LMS.

Organisation *(Page)*

Located under the Administration menu, this page provides the account profile details for an Edify User's training organisation.

P**Package** *(unit Information)*

Refers to the training packages found on training.gov.au.

Permissions *(Setting)*

The settings that allow a User access to the different features of Edify.

Permissions can be enabled or disabled to allow or deny access to certain features of the Edify system.

Can be edited when editing a User.

Also refer to [Users](#).

Published *(Status)*

A Unit status.

Units with this status:

- Are restricted from editing or changes
- Can be pushed to the LMS as either a Major or Minor Version by the Catapult team
- Can be requested to be Set Back to Draft status

A Unit with the Published status in Edify does not refer to its status in the LMS.

R**Read Only** *(Status)*

Can be applied to a Unit (meaning the unit is restricted to only be viewed and not edited by anyone in the organisation) or a User (Meaning the User's access to any Unit is restricted to viewing only and they do not have the ability to edit).

Ready *(Status)*

A Unit status.

Clicking the "Mark unit as Ready" button opens a pop-up window to confirm the action, with a text box to record changes that were made. Notes can be added for the Catapult Team, such as whether the changes to the Unit will be a Major or Minor update to the Unit in the LMS.

Units with this status:

- Are restricted from editing or changes
- Are made available to be checked by the Catapult team
- Can be set to the Draft or Published status by the Catapult team.

S

Status

Defines the stage of the Edify process a Unit is in.
There are five statuses a Unit can have:

1. Draft
2. Ready
3. Published
4. Set to Draft
5. Set to Draft (sent)

Suitability (label)

A system label controlling whether a Boilerplate applies to NRT, Non-NRT or both.

Supporting Info (Page)

A type of Section. In contrast to Assessment Sections, a Supporting Info Section only contains text or asset-linked content and does not contain any assessment content.

In a Units Online Variant, the Supporting Info Sections are grouped together in the online navigation menu under Supporting Info and contain two major headings:

1. Supporting Info
 - Additional information and evidence
 - Assessment agreement
 - Foundation skills checklist
 - Third party evidence collection agreement
2. Details about the Unit
 - Unit information
 - Unit mapping

T

Title (Label)

A type of label used in three instances:

1. The name of a Unit. For example, "Respond to grievances and complaints about the service". Two Units may have the same title but must have different codes.
2. The name of a Section. For example, "Knowledge questions". Each Section in a Unit must have a unique title. The default Section Titles can be overwritten. Overwritten Titles can be reset to their default.
3. The name of a Boilerplate. For example, "Assessment agreement". Each Boilerplate must have a unique title. Default Boilerplate content can be edited.

U

Unit

A learning or assessment resource managed in Edify. It may be based on a standard Catapult Unit or created by the organisation as an NRT or Non-NRT Unit.

A Unit is part of a qualification that provides a learner with specific skills and knowledge to be deemed competent in a specific workplace task.

Catapult Units are written to the requirements as prescribed on training.gov.au.

Units *(Page)*

This page lists all Units created or added to an Edify organisation.

New Units can be created through the menu in the top-right corner of this page.

Existing Units can be marked as ready, requested to be set back to draft or cloned.

Users *(Page)*

Located under the Administration menu, this page provides a list of all Users in the training organisation.

New Users can be created through this page.

Existing Users on this page can be edited, deleted or cloned by a User with the correct permissions.

User Permissions can be edited here.