LearnUpon

Learning as it should be

Glossary of Terms

Knowledge Base
LearnUpon's repository of support articles and videos to assist admins use the Learning Management System (LMS). Accessible by clicking the **?** icon in the top right of your screen.

Primary Navigation / Dashboard Menu
The main dropdown menu in LearnUpon is located in the top left corner of your screen.

Secondary Navigation Menu
The menu bar that appears along the top middle of your screen.

Parent / Top-Level Portal
Your dedicated environment within LearnUpon that you can brand and customize.

Client / Sub-Portal
A separate dedicated environment within your subscription that can also be branded and customized for a separate user group.

Course
A combination of modules, SCORM or Tin Can files, ILTs, exams, surveys or assignments

Module
Uploaded course material consisting of text & images, documents, video or audio files.

Library
A repository of reusable modules, question pools, SCORM or Tin Can files and resources, viewable by admin users only.

Question Pool
A pool of reusable questions from which an exam or survey can be created.

SCORM or Tin Can
A collection of standards for authoring LMS content.

ILT
Instructor Led Training - classroom or webinar-based training that takes place at a specific date and time. Can be used to create blended learning courses.

Resource
Learning material that is not course-specific and can be accessed at any time by download or shareable link.

Catalog
Courses or learning paths made available for learner browsing and self-enrollment.

eCommerce Storefront
A gateway for selling your LearnUpon courses and learning paths to the public.

Learning Path
A customized collection of courses, similar to a curriculum, taken by learners to attain specific subject matter knowledge and/or certification or accreditation.

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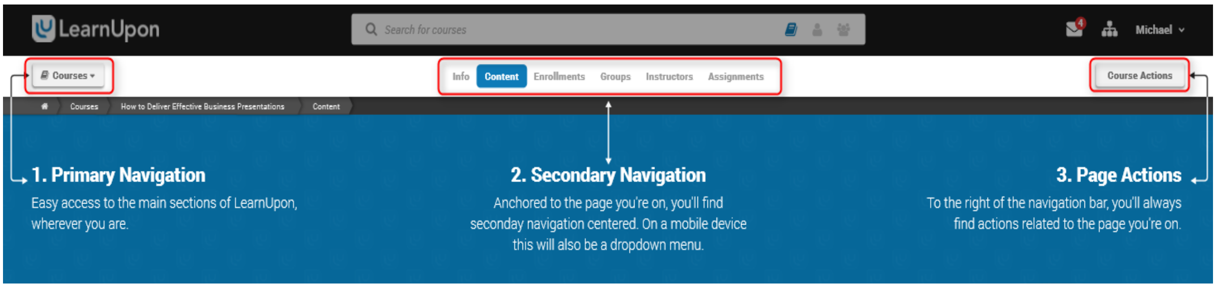
Navigation

The LearnUpon application is designed to be deliberately simple, intuitive and responsive. It has been designed with mobile learning in mind. As such, it works on tablets, smartphones, or other mobile devices, as well as on your desktop.

There are three main navigation menus:

1. **Primary Navigation menu** - This dropdown menu contains links to the core LearnUpon functions
2. **Secondary Navigation menu** - The options that appear on this menu bar depend on your primary navigation menu selection
3. **Page Actions button** -This button enables you to perform certain actions depending on your location within the system



> ***Tip**: Regardless of where you are in the application, clicking on your logo will take you back to your dashboard / home screen.*

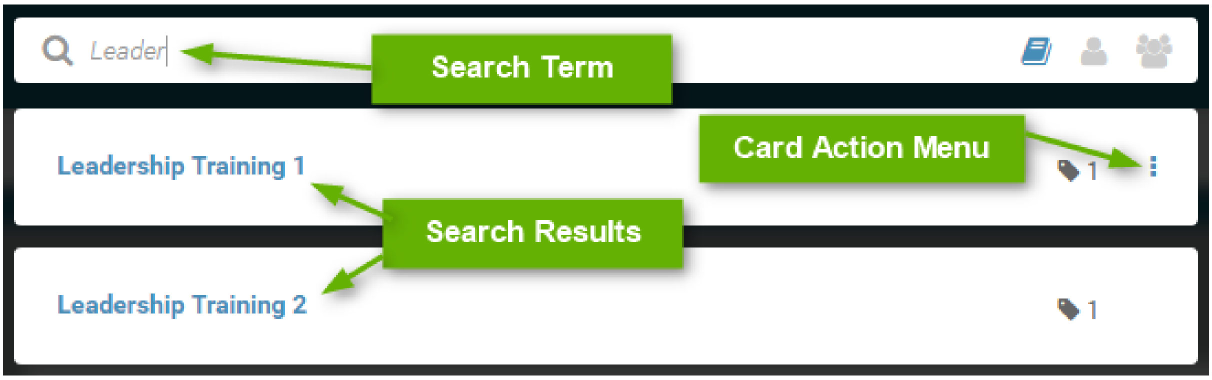
Smart Search

At the top of every LearnUpon screen, you will find our smart search bar. This tool is useful for finding information quickly and navigating directly to it. Click on the icon to the right to search by course, user or group.

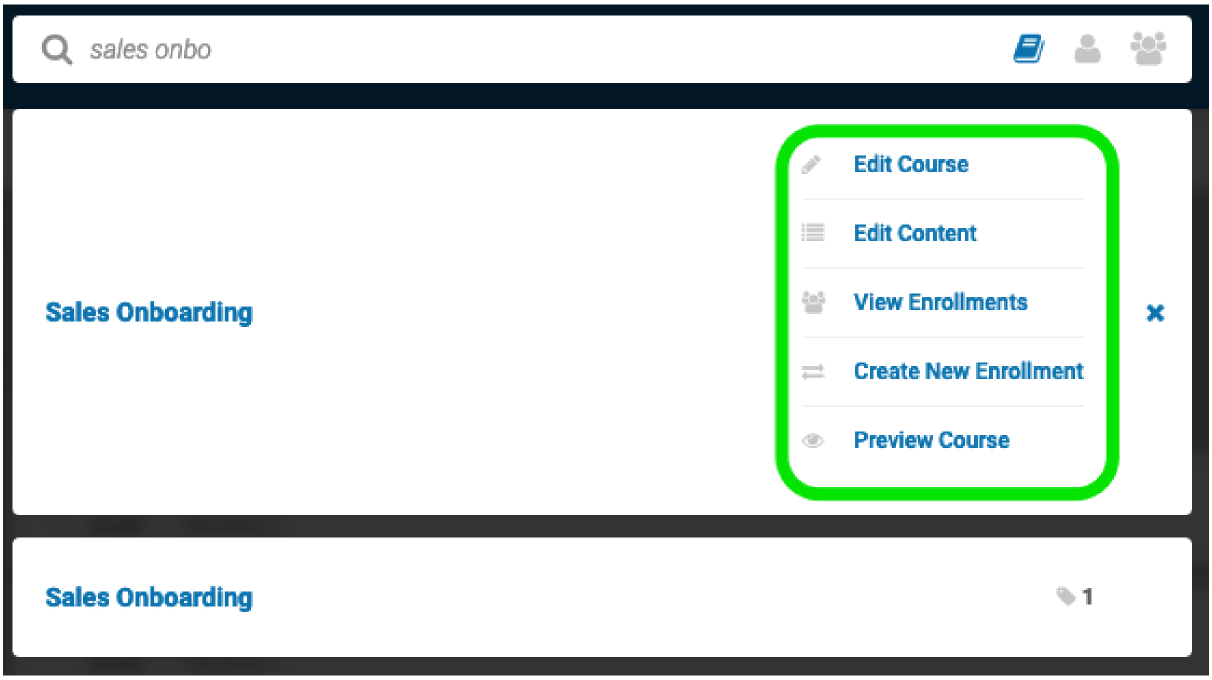
Once you find what you are looking for, click the link to navigate directly to it.

Card Action Menu

Alternatively, you can click the card actions menu on the right side of each result:



This brings up shortcut options relating to your search result, which you can then click to take the relevant action.



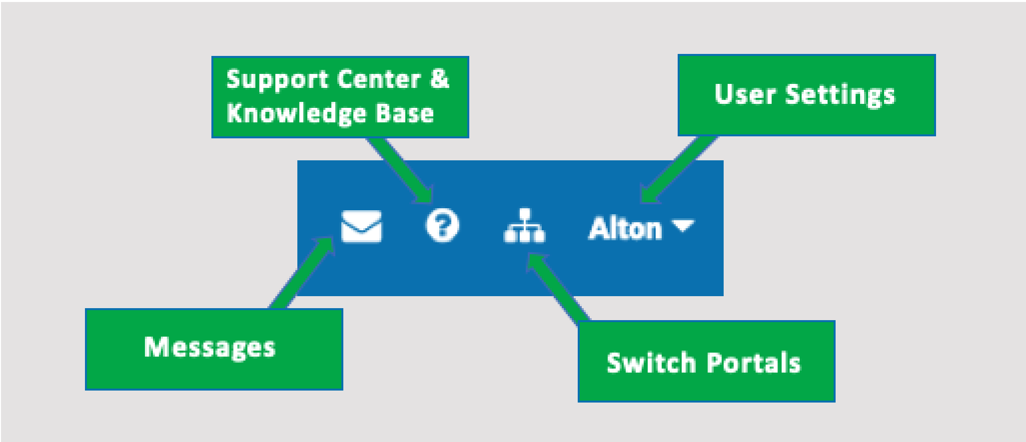
***Note**: The smart search for Learners has the ability to search by course, learning path, catalog, or resource (if enabled). LearnUpon has a secondary search functionality, indicated by a magnifying glass icon, located under the page actions button. This performs a local search of the information displayed on the current page.*

Messages, Switch Portal, Support Center and User Settings

A top level admin can have up to four icons:

- **Messages** - view received messages or compose and send a new one to a learner or group. Learners will have the ability to message course owners by typing the name of a course in the **To** field. Your portal setting for messages controls whether these are sent internally only or internally and externally.
- **Support Center & Knowledge Base** - enter our support center where you can log and track tickets with LearnUpon's Support team, as well as access our Knowledge Base by selecting the LearnUpon Knowledge Base option at the bottom of the screen.

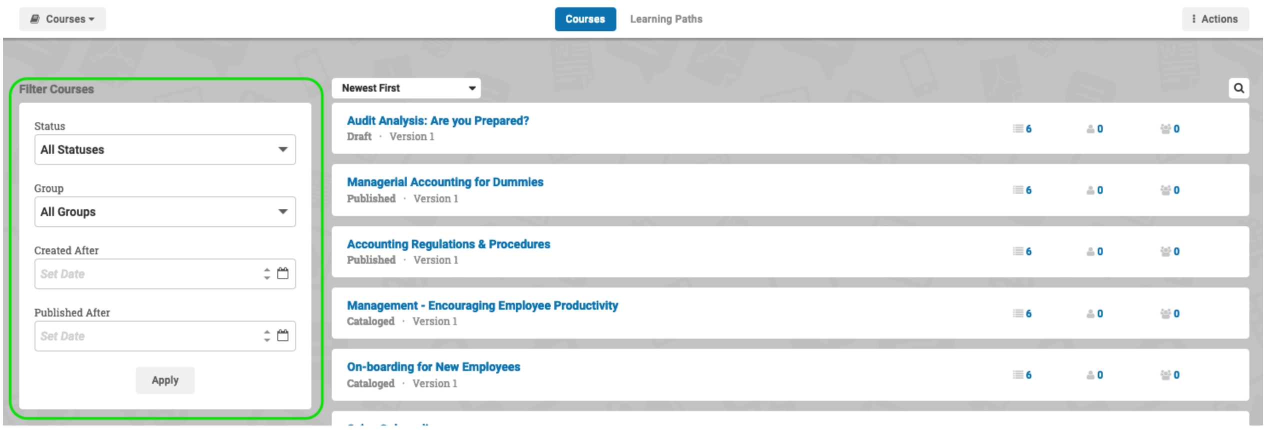
- **Switch Portals** - if you have multiple portals as part of your LearnUpon subscription, click here to navigate between them.
- **User Settings** - view your profile, enter the settings menu, access our Help Guide, change your language, access your Billing screen (if enabled) or Log Out.



***Important**: The URL for the Knowledge Base is: https://support.learnupon.com/. Top level administrators must be logged in to the portal in order to access the knowledge base..*

Page Filters

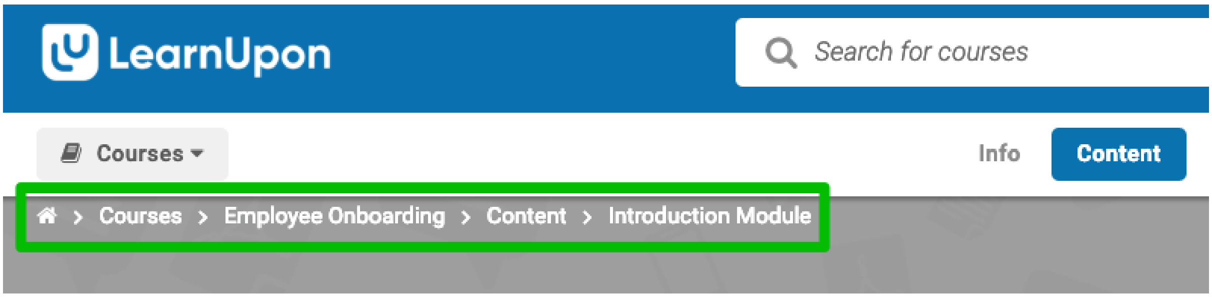
Certain pages within LearnUpon can also be filtered by using the Page Filter Menu. Courses can be filtered by status, group, creation date or published date. This is useful if you only want to view certain information e.g. courses created this year in draft format, etc.



***Tip**: Throughout LearnUpon, you will see the icon beside many options. Click on this icon to see useful details about the associated action.*

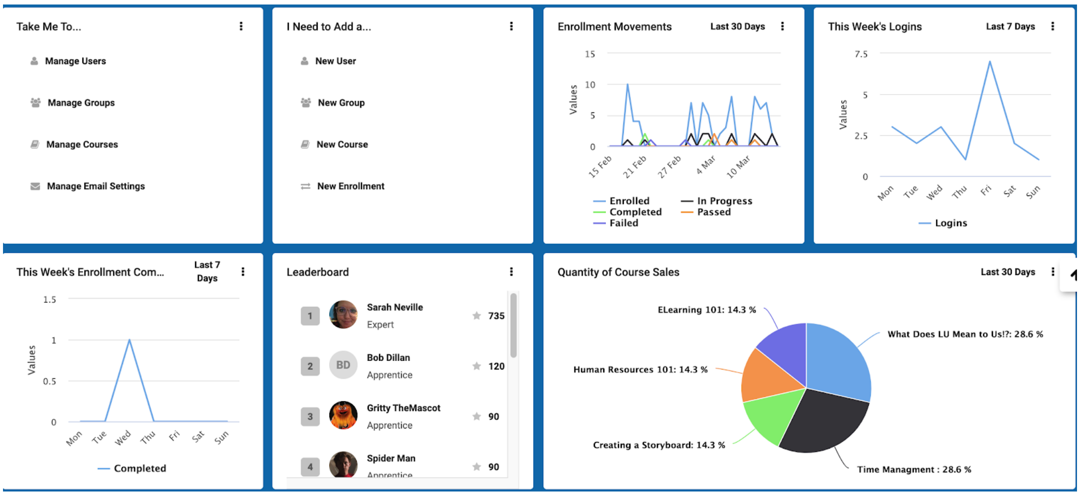
Breadcrumb Trail

This is located directly under the primary navigation menu and is visible on select screens. Click on any link within the trail to jump to it or navigate back to a previous page as required.



Admin Dashboard

The Admin Dashboard consists of cards that can be customized by Administrators to display shortcuts for common actions or analytics regarding portal usage and sales. Select the ellipsis to edit which actions display or delete a card. Select **Create New Widget** to customize a new action card.



Note:** To display user login and enrollment movement graphs, enable **Show charts/graphs panel** from **settings > my portal > dashboard settings.** Gamification users can also turn on an admin leaderboard from **settings > my portal > gamification > leaderboards and widgets.

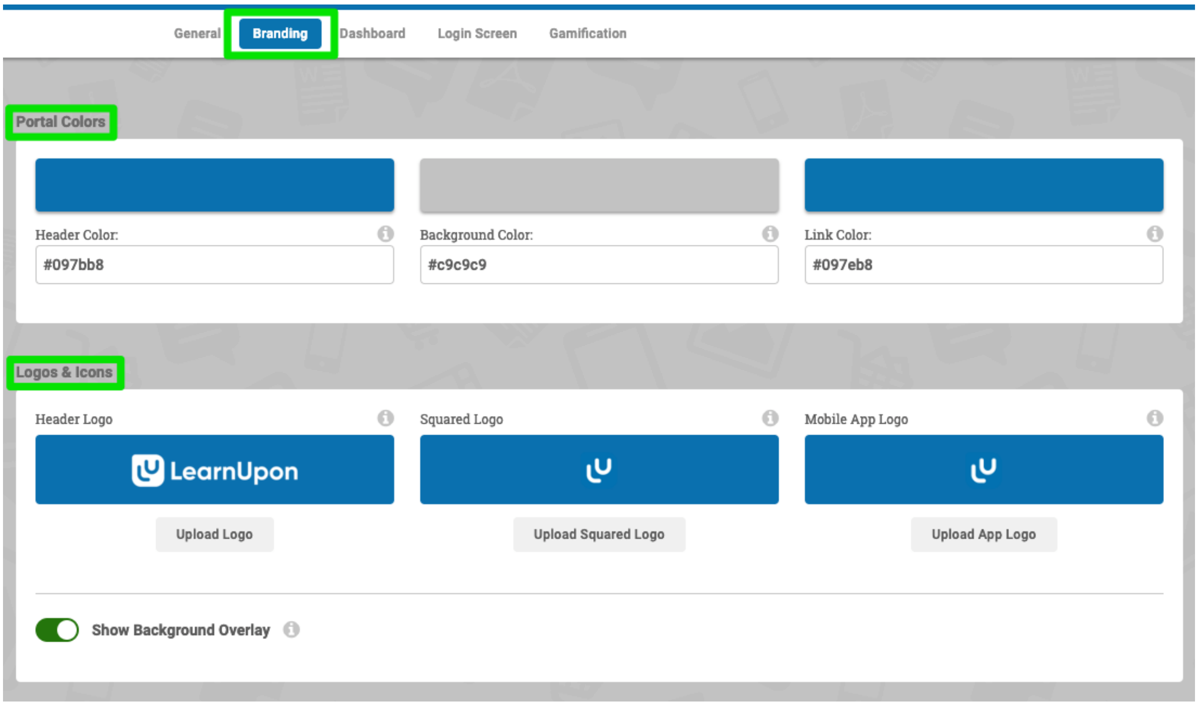
End of Section - Click to return to Table of Contents

2. Branding your Portal

Your LearnUpon portal can be customized to reflect your business's brand. This includes adding your own logo, customizing the header, background and link colors, and including a footer link to any website or email address. Your portal's log-in screen, dashboard banners, catalog banners, storefront, And select email templates can be customized as well.

2.1 Portal Branding

1. To brand your portal navigate to **Settings > My Portal > Branding**



Portal Colors

There are three aspects to customizing your Portal colors:

- **Header Color** - applied to both your header and footer. The color of the header icons will change to complement the header color selected.
- **Background Color** - this will change the background color of your portal. According to color theory; Red, orange, and yellow create high-energy and attract attention, whereas green, blue, and violet form a relaxed or focused learning environment.

> ***Important:*** *You cannot use white as your background color. Text and cards in LearnUpon are also white, making it very difficult to differentiate.*

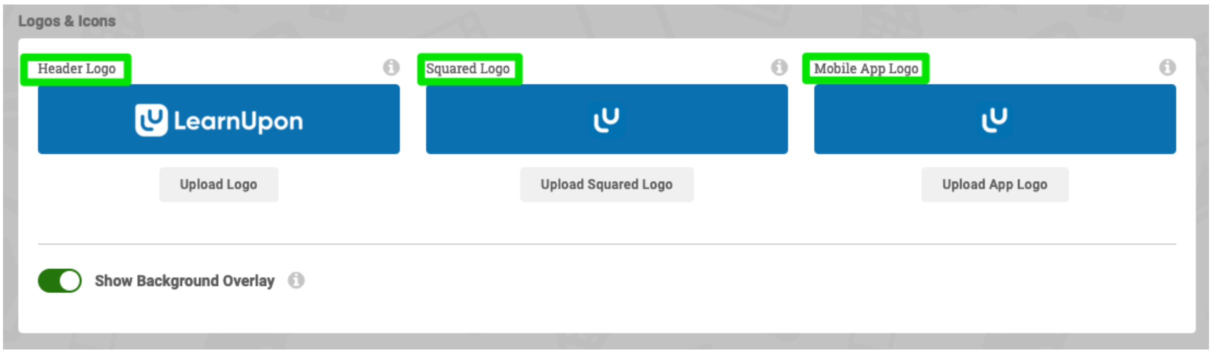
- **Link Color** - all links and active tabs in your portal will display in the color selected. We recommend selecting a darker color here as many links reside in white tiles.

Select the relevant color box, which brings up LearnUpon's color selection tool, and choose your preferred color manually or enter a six digit hex color code in the text field below the color box. Once entered, the color will populate in the box and it's relevant area. **Save** to confirm.

Logos & Icons

There are also three options under **Logos & Icons**. These are:

- **Header Logo** - This is the logo that will appear in the header of your portal. We recommend using a transparent PNG or JPG file. To present the best quality image and logo on all devices, use an image height of 72px.
- **Squared Logo** - This logo will display as your favicon icon. This is also the logo that will appear in your header when learners access your portal on tablet or smartphone device. If your company has a symbol, it is a good idea to use it here. We recommend a transparent PNG image with dimensions of 72px for best results. To test your squared logo, simply upload a logo and resize your browser screen.
- **Mobile App Logo** - This logo will appear when learners access your portal through the LearnUpon mobile app. It is best to upload a high resolution image, which will be resized to 40 x 40px or 80 x 80px depending on the learner's mobile device.



***Note**: On this screen, you can also choose to show our background overlay - this consists of shadowed images that are most visible on light colored backgrounds.*

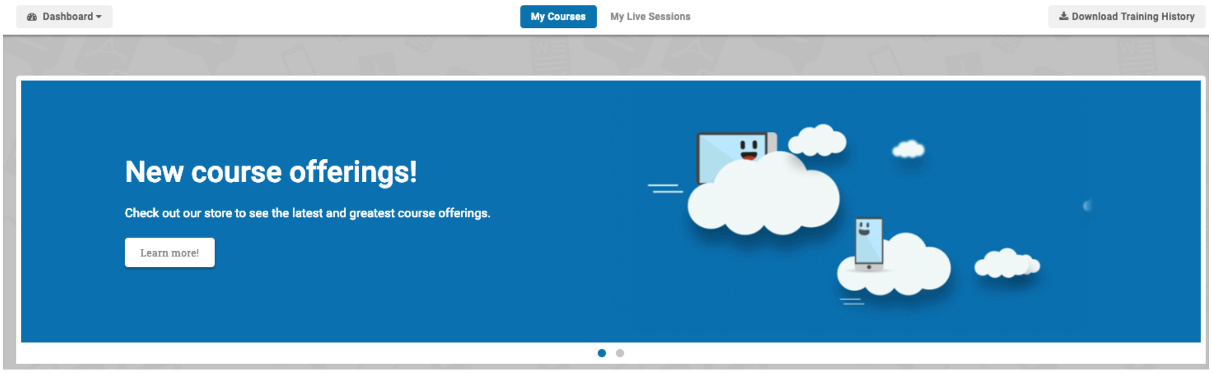
Add Link to Portal Footer

A link to direct learners to your corporate website, privacy policy, terms & conditions etc. can be added to your Portal Footer. Alternatively, this link can be used as a mailto: shortcut.
To add or edit this link :

1. Enter the destination URL or mailto:email@email.com option in the **Link Location** field
2. Add a **Link Title** which will appear to learners
3. Click **Save**
4. The link you've saved will now appear centered in the footer of all pages in your portal.

2.2 Dashboard Banners

Once enabled, dashboard banners appear to learners along the top of their dashboard. Banners are a great way to make learners aware of a new course or an upcoming event!



There are three types of dashboard banner: multimedia, image and centered content.

- **Multimedia Banners**: A multimedia banner can contain a video or image (recommended size 1294 x 640px), and a customized button which can redirect users to a URL in a new tab or open a pop-up box with additional text. You may create up to three multimedia banners. If you have more than one banner enabled, they will rotate every seven seconds.

- **Image Banners**: An image banner can contain a JPEG or PNG image file (recommended size 1540 x 320px). You may create up to three image banners. If you have more than one banner enabled, they will rotate every seven seconds. For optimal results, use images less than 300KB in size. Each image may also be enabled to link to a URL when clicked.

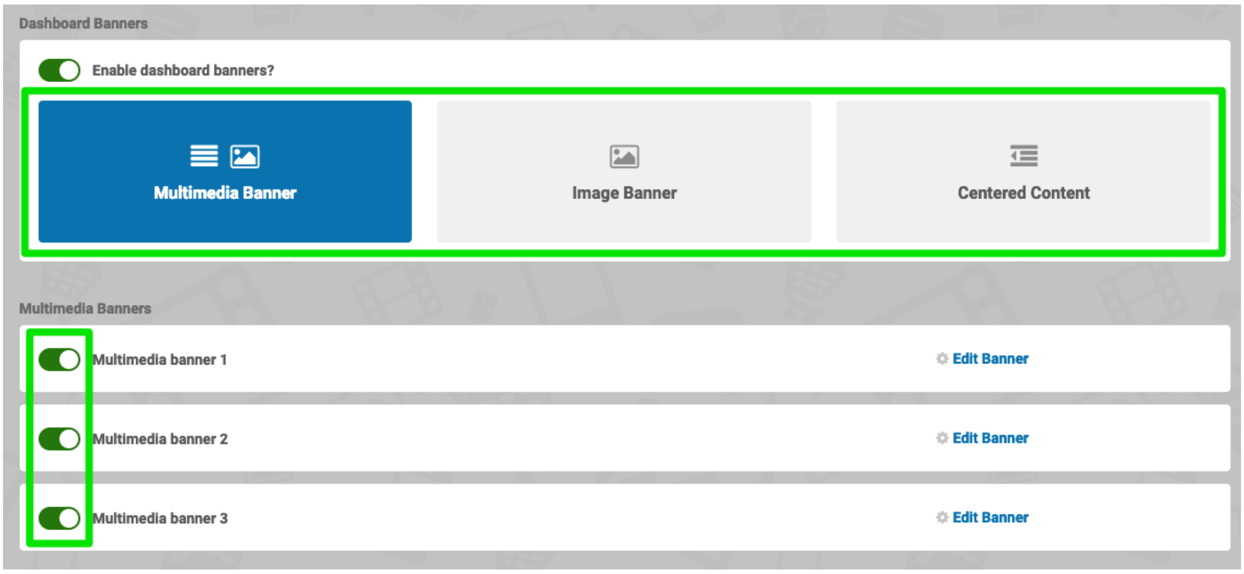
***Tip**: You can only use one dashboard banner type at a time. Therefore, you may have up to three rotating multimedia banners or up to three rotating image banners, but not a mix of both. It is recommended to first determine how you wish to use the banner space and then select the banner type that best matches your objective.*

If the catalog is enabled catalog banners can be added to display on the catalog page for a total of

- **Centered Content**: Here, you can use a text editor to create content that will be centered in a large single custom panel. This may include text, links, images and/or embedded video. With this option, you may also enable learners to hide the panel once viewed.

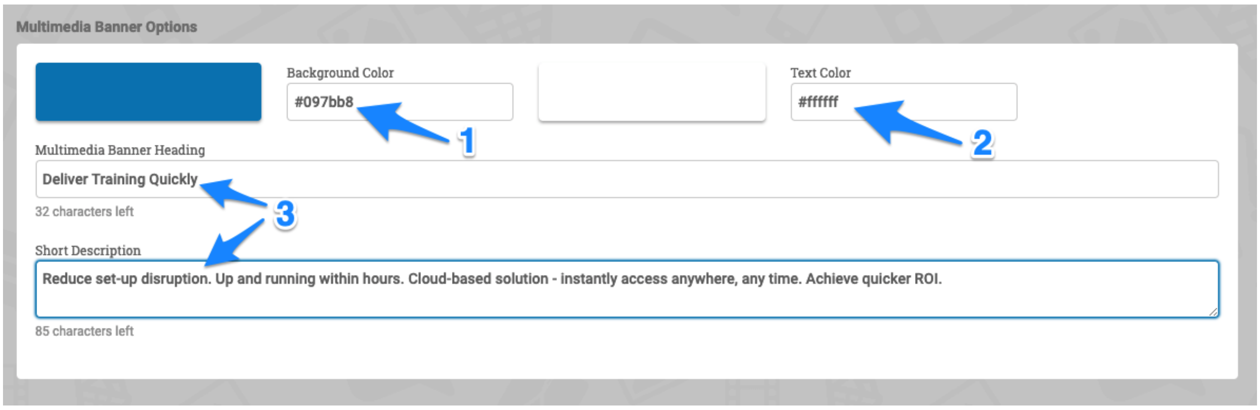
To add a dashboard banner:

1. Navigate to **Settings > My Portal > Dashboard Settings and Banners > Edit Banners**
2. Enable the **Enable dashboard banners?** setting
3. Select the dashboard banner type you wish to use
4. Click the **Edit Banner** option(s) that will appear beneath your selection
5. Customize your banner(s) and select **Save** - more detail on this is below
6. Enable all banners that should be active
7. Click **Save**

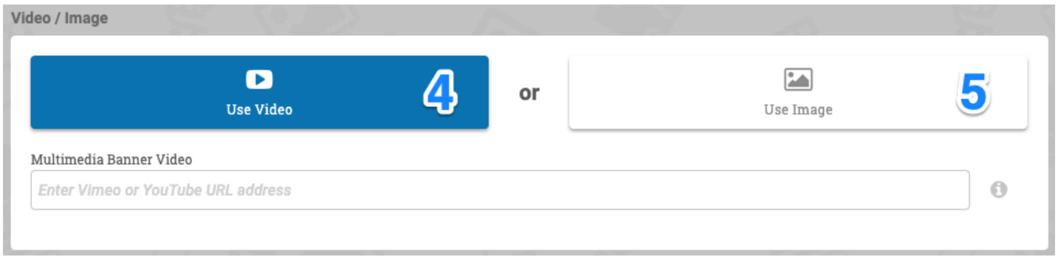


Editing a Multimedia Banner

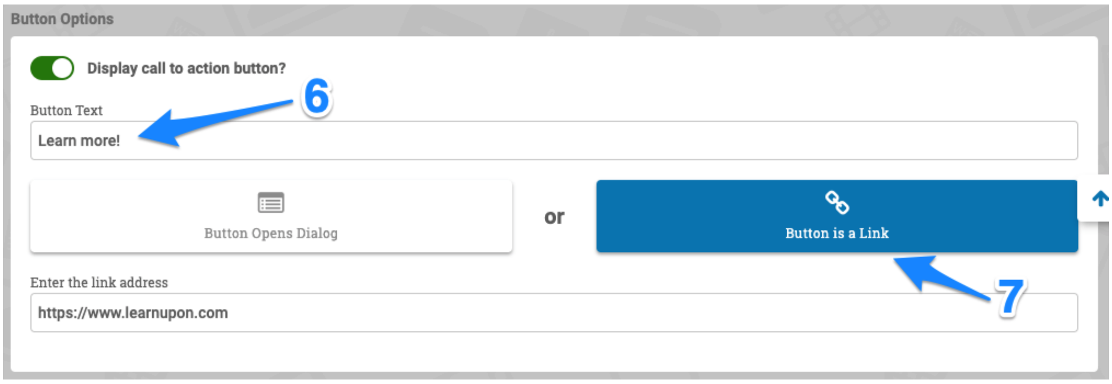
Multimedia banners allow one to adjust the (1) Background Color, (2) Text Color and (3) Heading and Short Description that appear on the banner.



(4) Add a video to the banner using a YouTube or Vimeo link, or (5) Add an image . These will appear embedded in the right-hand side of the multimedia banner.



Finally, (6) customize the button text that appears on the banner (for example **Read More** or **Visit Website**) and set the button to either open a dialog box (with customized text, images, tables or hyperlinks) or (7) open a URL .



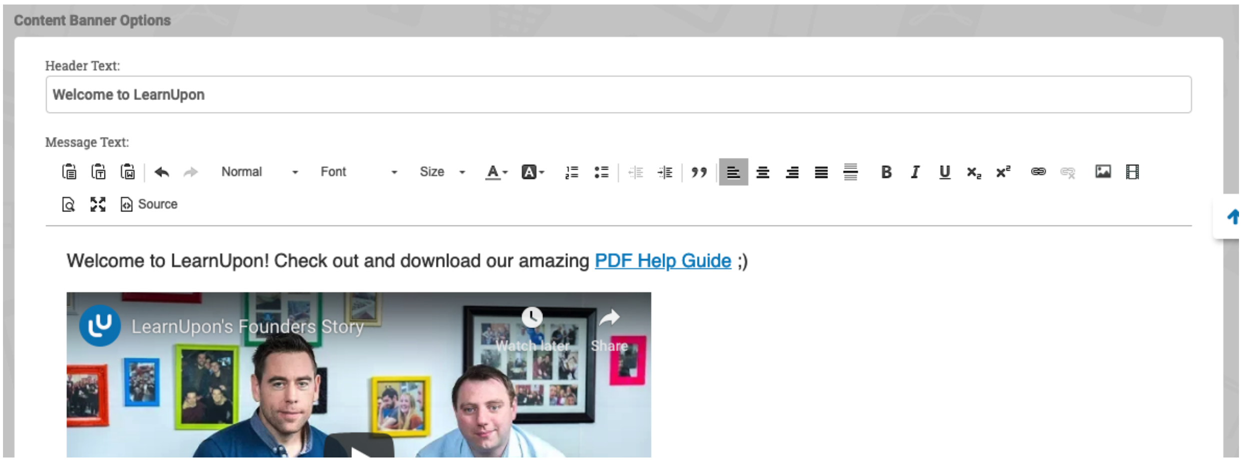
Editing an Image Banner

1. Under **Settings > Portal > Dashboard Banners > Image Banner**,
2. select **Edit Banner**, and **upload an image**.

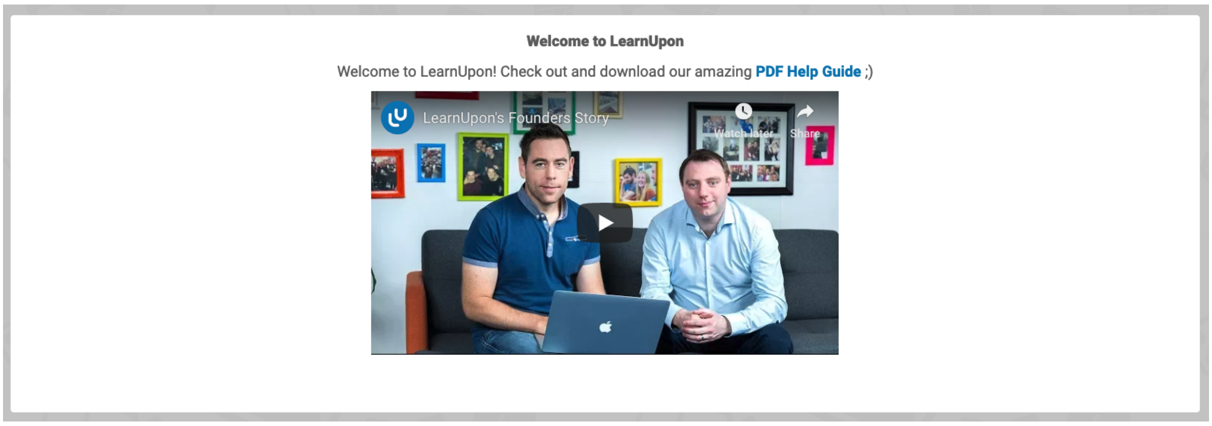
Note, it is important to upload an appropriately-sized image (1540 x 320 px) for optimal display. Once uploaded, preview your image above and enable the **Promotional banner is a link?** setting to enter a destination URL.

Editing Centered Content

1. Under **Settings > Portal > Dashboard Banners > Centered Content**
2. select **Edit Banner**, and a text editor will appear.



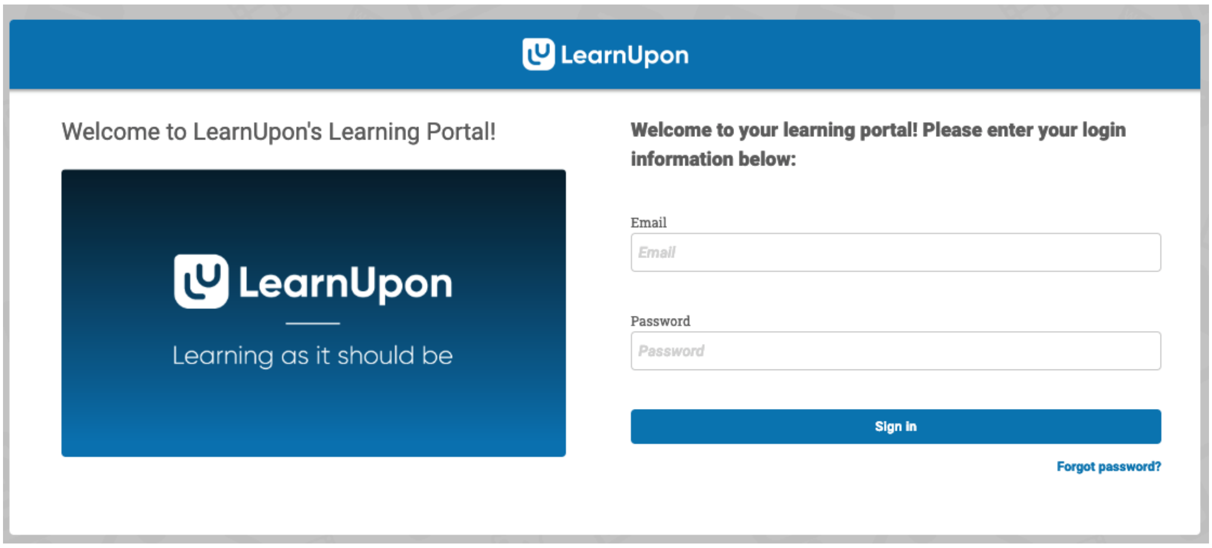
Add and format text, images and/or embedded media until satisfied with the final output. Within this page, you may also enable the toggle to **Allow learners to hide message** after initial viewing. This option removes the content window from view until the learner navigates away and back to the page. See an example of centered content with embedded media below.



2.3 Login Screen

The LearnUpon portal login screen can be customized to display login tips and/or a welcome message for learners. Images and embedded videos can also be posted on the login screen. To customize your Portal login screen:

1. Navigate to **Settings > My Portal > Login Screen Layout**
2. Toggle on **Display sign into portal text**
3. Enter your **sign into** text that learners will see at the top of their login page
4. Enter a **login message, image, or video from Youtube or Vimeo**

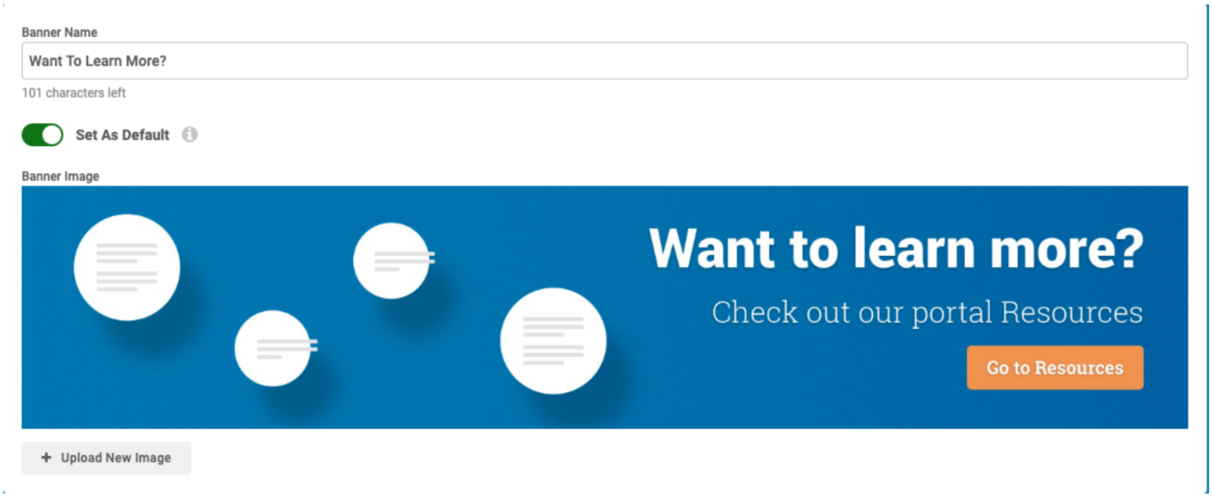


2.4 Email Templates

Customize select system-generated email templates to reflect your desired message. Upload banner images which can be included on particular templates and vary by course.

To add email banner images:

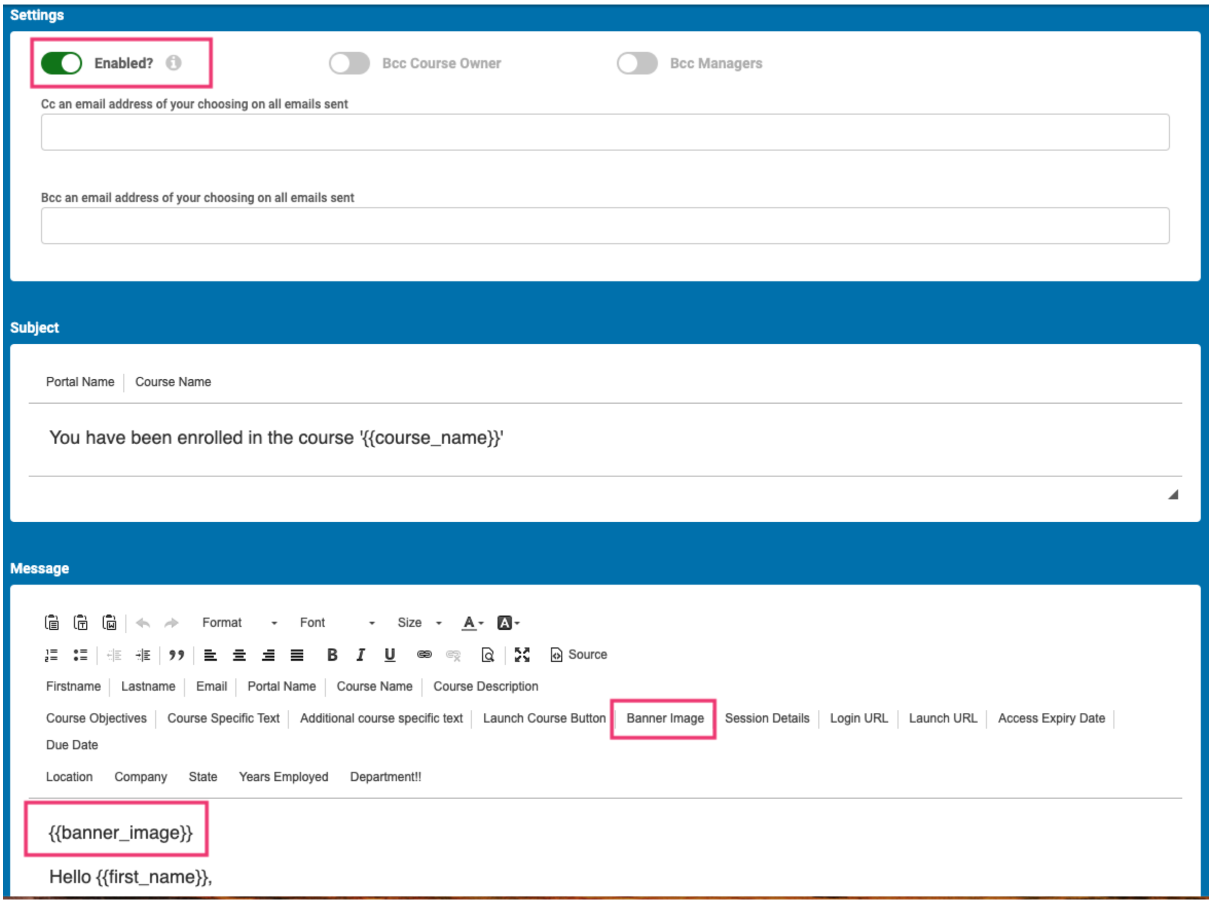
1. Navigate to **Settings > Email > Email Banners > Add Banner**
2. Name the Banner
3. **Upload the Image** meeting the specified size requirements
4. **Set as Default** if this image should be the standard
5. **Save**



To enable custom template emails, including banner images:

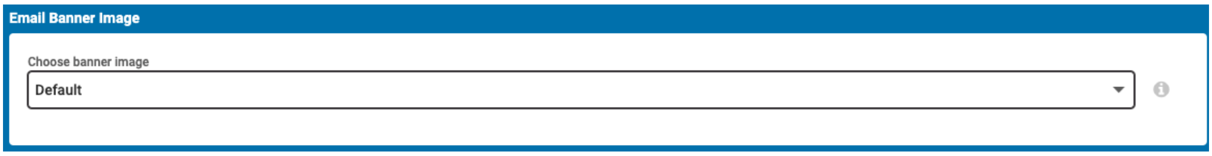
1. Navigate to **Settings > Email > Custom Email Templates**
2. Select the *name* of the template to adjust
3. Toggle on **Enabled**
4. Place the cursor within the template where the banner shall display (top/bottom of template)
5. Select the text **Banner Image**
6. Make any additional modifications to the message desired

7. **Save**
8. If the **course specific text** or **additional course specific text** buttons were selected, navigate to the **Courses > *Course Name* > Notifications** page and update the corresponding box with the message to include on the template.



To identify which banner should be associated with a particular course:

1. Navigate to **Courses > Course Name > Notifications**
2. In the **Email Banner Image** section, select the name of the banner desired



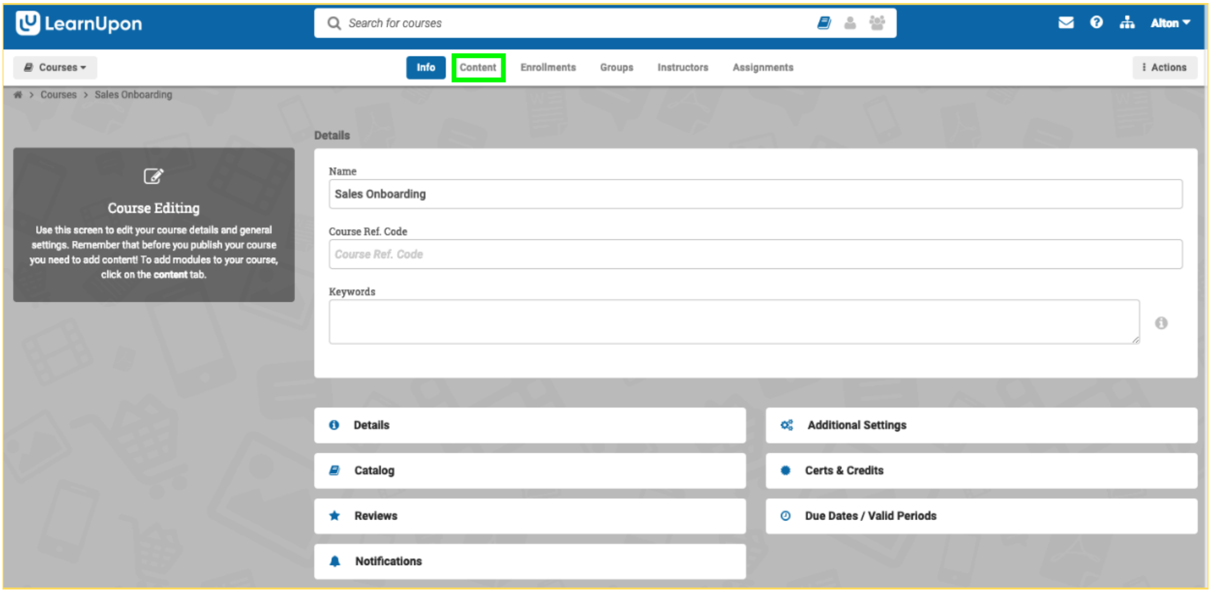
End of Section - [Click to return to Table of Contents]

3. Creating a Course

To create a new course:

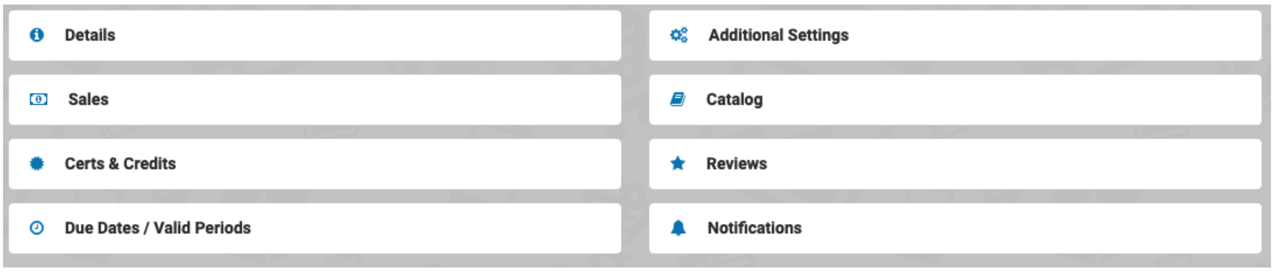
1. Select **Courses** > **Actions** > **Create New Course**
2. Enter a **course name** (mandatory) and a **description** (optional) and **Save**

3. You will then be brought to the course info page where you can **configure your course settings** (see additional information below)
4. Click **Content** in the secondary navigation menu to upload course materials
5. Select **Actions** > **Preview Course** to review the new content for accuracy
6. Select **Actions > Publish Course** to be able to enroll users or add to a Learning Path.



3.1 Course Info

Having created your course name, you can now set various course options under the **Info** tab in the secondary navigation menu:

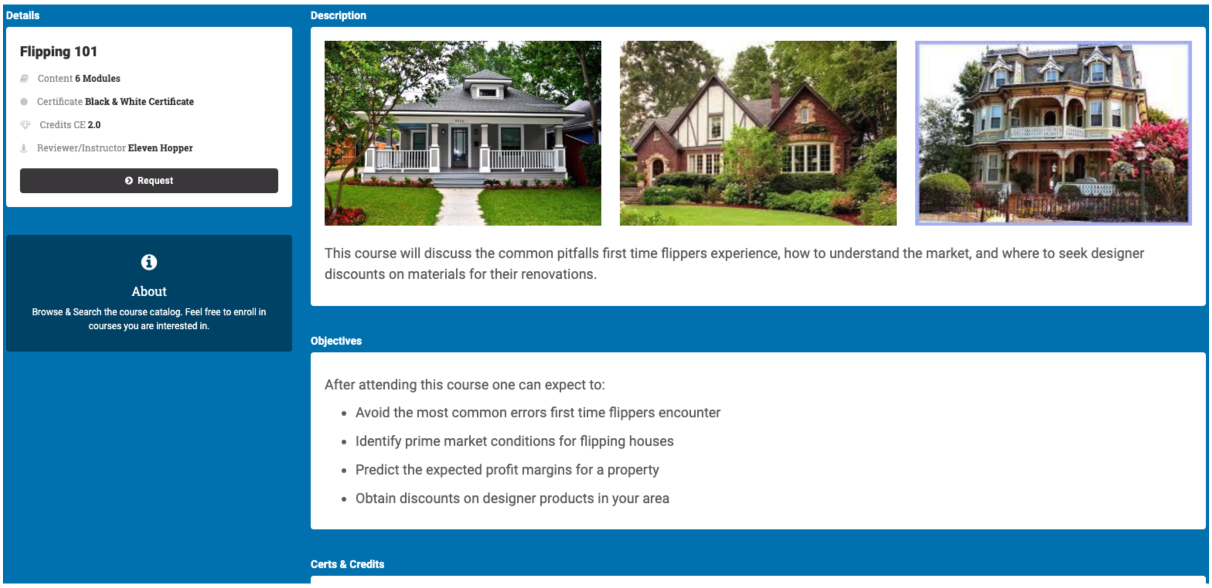


3.1.1 Details

Select **Details** to:

- Edit the **Course Description**
  - Can include text, tables, images, or embedded videos
- Edit the **Course Objectives**
- Upload three course **images**
  - JPG or PNG format, 600 x 400px
  - The image marked **set as default** will display as the associated course image.

Course descriptions and default images will display on the user dashboard, catalog and storefront. The course objectives and additional images will display when a user selects the course name to view additional information or launch the course.

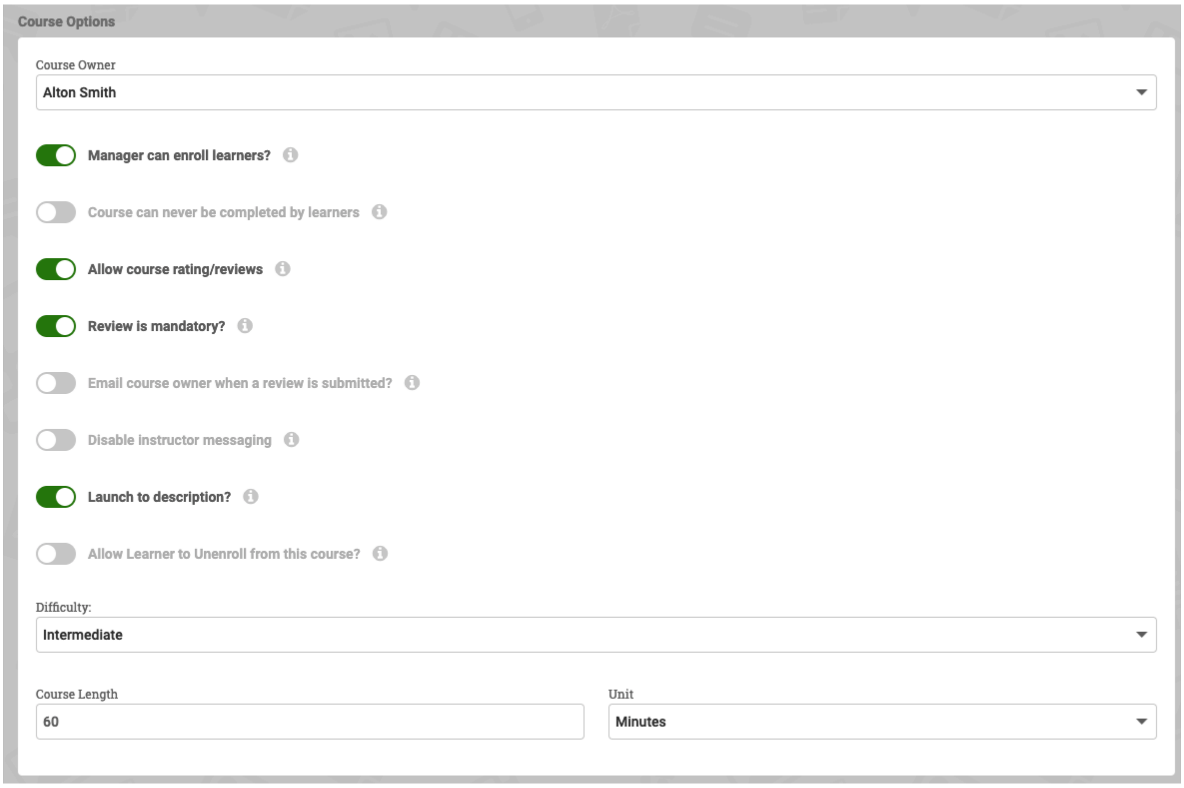


3.1.2 Additional Settings

Select **Additional Settings** to set the below settings:

- **Course Owner** defaulting to the creator of this course, the selected Admin or Instructor will receive notifications for assignments, exams, and questions on this course.
- **Manager can enroll learners** makes this course an option for enrollments for managers with the ability to enroll learners
- **Course can never be completed by the learner** ensures the course always sits in the learner's dashboard rather than moving to the completed courses tile.
- **Allow course rating/reviews** prompts learners to rate and review your course on completion. Ratings & reviews are public and display within the catalog & storefront.
- **Review is mandatory** will require a review before marking a course complete
- **Email cours owner when a review is submitted** sends an email to the course owner when a review is submitted
- **Disable instructor messaging** prevents users from messaging this course owner through the messenger.
- **Launch to description** takes learners to the course description page on initial launch prior to the 1st module
- **Allow learners to unenroll from this course** allows learners to remove themself from the course enrollment.
- **Difficulty** labels the course as basic, intermediate or advanced. This will be displayed in the course catalog and/or storefront
- **Course Length** labels the minutes or hours expected to complete this course and displays on the course description page.

Once you have configured these settings, click the **Save** button.



3.1.3 Course Data

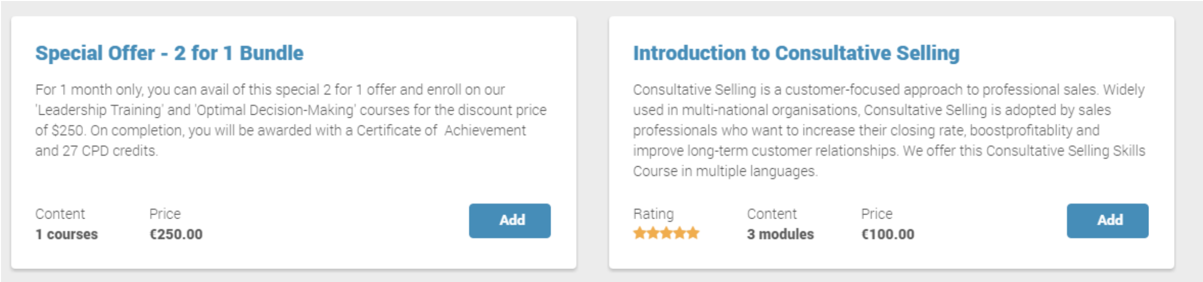
LearnUpon allows course creators to add custom course data to your courses, which can be used to help search and filter your Reports. For example, you may wish to run a report on all courses labeled with the custom field “2020”. You can also set these fields via our API if you need to populate the data automatically from a system outside of your portal.

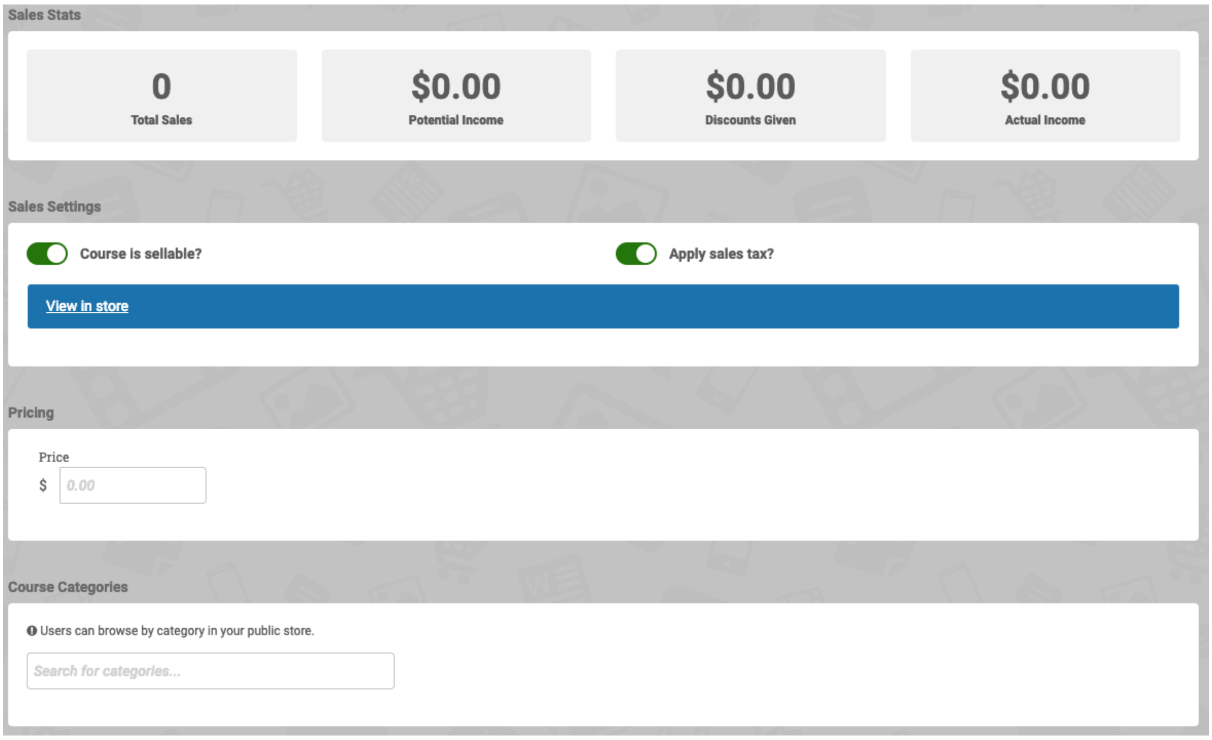
Note: *If this feature is of interest, please let your dedicated LearnUpon representative know, and they can enable Custom Course Data for your portal. Once enabled, options can be created in* ***Settings > Courses > Custom Course Data***

3.1.4 Sales

If you have eCommerce enabled (in Settings), you can click into this option to:

- Make your course **sellable**. Once saved, it will be listed for sale on your Storefront .
- Apply Sales Tax
- Identify the storefront price
- Categorize your course
- Limit the course to a specific group(s)
- Create course specific coupon(s)
- View bulk purchase information





To create a course-specific coupon:

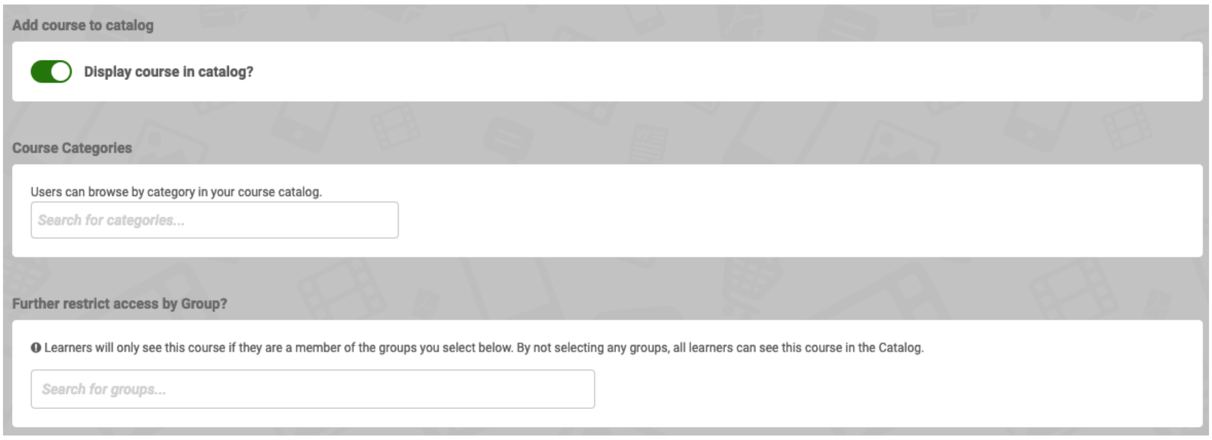
1. Select **Coupons** from the secondary navigation menu
2. Click the **Actions** button (top right) and select **Create Coupon**
3. Enable the **Coupon Enabled** setting and enter the following information;
    - Discount method (% or $ amount)
    - Discount amount (% or $ amount)
    - Usage limits (the number of coupon instances)
    - Expiry date (when the coupon becomes invalid)
4. **Save**

3.1.5 Catalog

The catalog allows learners to browse for content and self enroll (see Section 9 for more details).

1. **Display course in catalog?** Enable this setting to display this course into the catalog.
2. **Enrollment must be requested** will display if the option to require enrollment requests is turned on (**Settings > Courses**). This toggle must be on for requests to be required on this course.

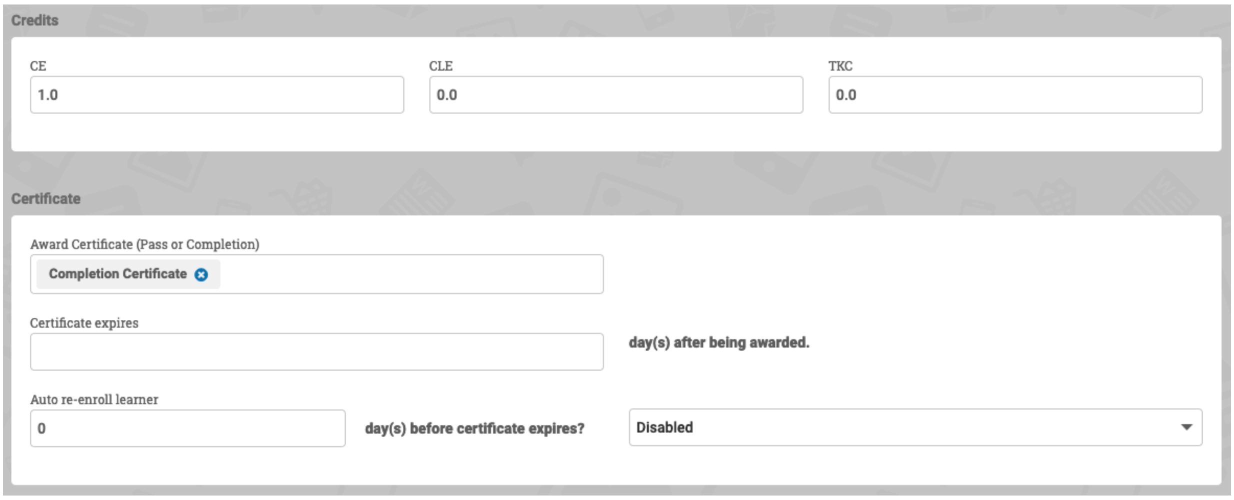
3. **Course Categories:** Enter one or more categories for this course to display when users filter the catalog by .
4. **Further restrict access by group:** Add a group or groups so that only members of those groups can see and enroll in the course through the catalog.



3.1.6 Certs & Credits

LearnUpon allows administrators to create customized certificates and award them to your learners upon completing a course or learning path. You can also award learning credits. See **Section 12** for how to create a certificate and information on learning credits.

The image below shows a course that will award 1 Continued Education Credit and also, a Certificate with no expiration date.



Credits: Enter the number of credits a learner receives for completing this course.
Certificate: Enter the name of the certificate a learner should receive when completing this course. This certificate will be emailed to the user if course completion emails are sent. Otherwise, the learner can download their certificate from their completed course tile.
Certificate Expires: Enter the number of days the certificate is valid for if there is an expiration date.
Auto Re-enroll Learner: If the certification is routine, enter the number of days prior to expiration that the learner should be automatically re-enrolled into this course. Toggle the dropdown to **Enabled**.

3.1.7 Reviews

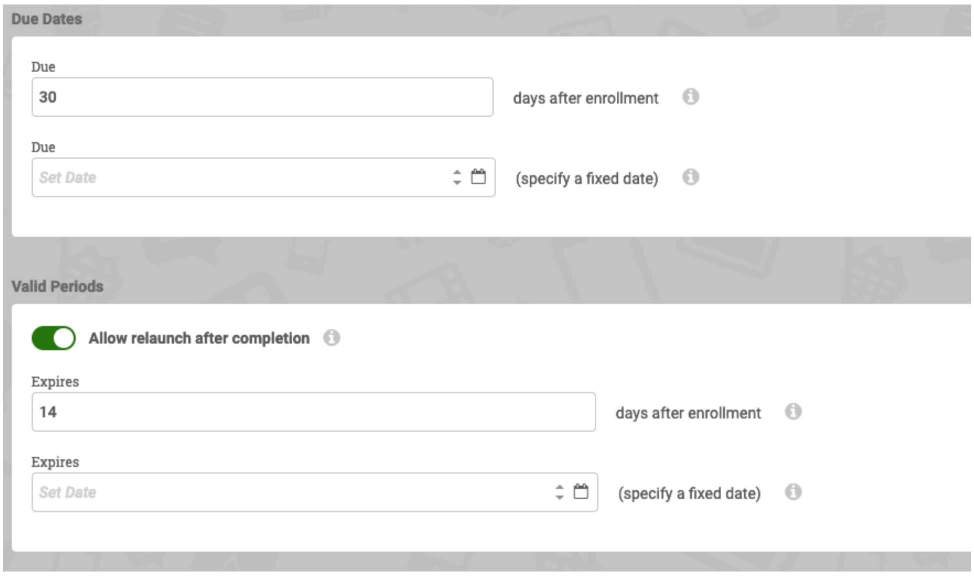
If reviews are allowed per the additional settings tab, they will be public to all who have access to view the course title. If a course is licensed to different portals, the star ratings will display in all portals, the reviews will only be visible if written by a member of the same portal as the reader. All learner reviews are stored within the **Course > Info > Review** tab. To remove user reviews, select the ellipses and delete option beside the relevant review.

3.1.8 Due Dates / Valid Periods

A **Due Date** displays to the learner indicating when they should complete the course by. This can be either a fixed date or a number of days after enrollment. Once this date has passed, the learner can still access the course.

A **Valid Period** displays to the learner indicating when they can no longer access the course. This can also be either a fixed date or a number of days after enrollment.

Allow relaunch after completion, if enabled, allows learners to start this course from the beginning after they have already completed it. This setting will respect valid periods if they exist.



***Note**: If you set both number of days and a fixed date, whichever occurs first takes precedence. If the course is assigned multiple times a year, use the **days after enrollment** option so the due date doesn't need to be adjusted*

***Tip**: You have the ability to overwrite a course's due date and valid period for each user individually. To do this:*

1. *Select **Users** from the primary navigation menu*
2. *Click the user's **name***
3. *Select **Enrollments** from the secondary navigation menu*
4. *Click the card action menu for the course and select **Set Due Date** or **Set Expiry Date***
5. *Reset the date and click **Save***

3.1.9 Notifications

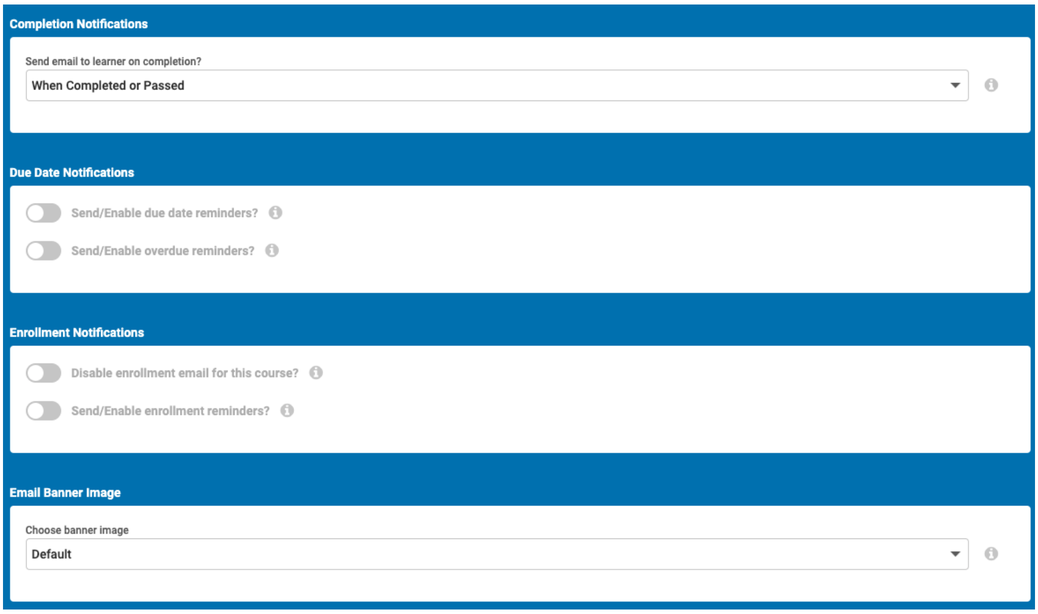
Completion Notifications: Opt to send learners a course completion email when they've completed or passed a course, when they've completed a course pass or fail, or never.

Due Date Reminders: If a due date is in place, the option to **send/enable due date reminders** will be available. Up to two reminders can be set to notify users of the upcoming scheduled due date.

Overdue Reminders: If a due date is in place, the option to enable up to two overdue reminders can be set.

Enrollment Notifications: The option to disable the enrollment email for the course can be turned on here. **Enrollment Reminders**, if enabled, will send an email to all enrolled learners who have not yet completed the course. You can configure up to four reminders to be sent at your chosen time period after enrollment.

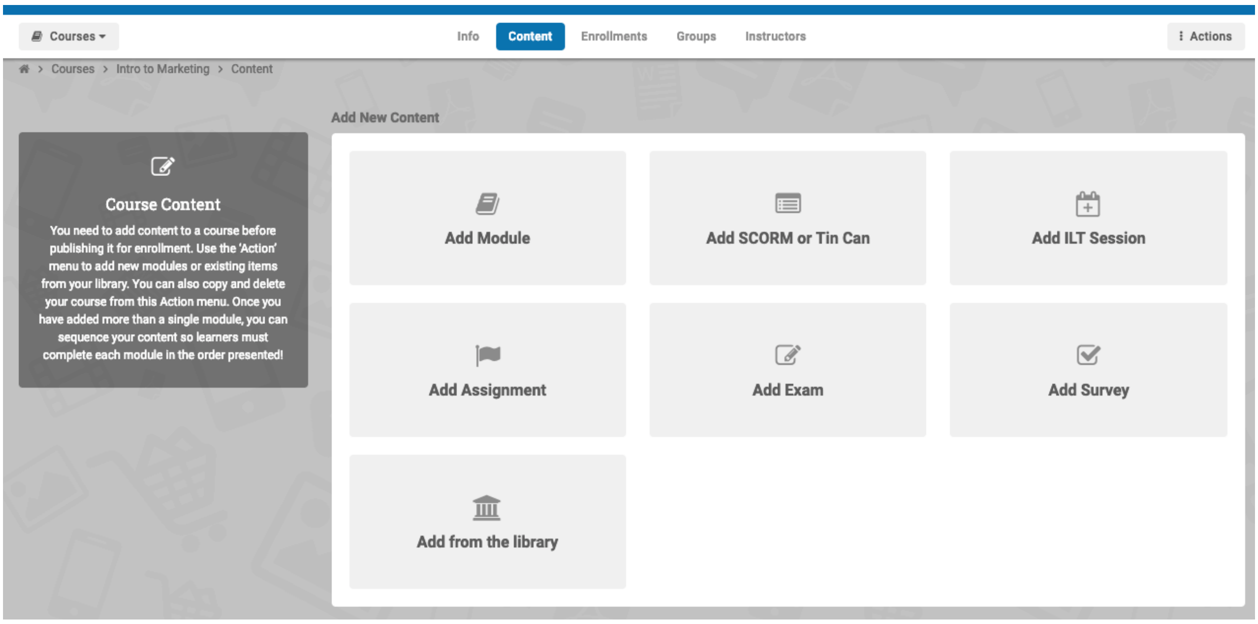
Email Banner Image: Select the banner name to be included on this course's custom emails.



3.2 Adding Content

Now that you have set your options under the Course Info page, you are ready to add content to your Course! This can consist of many different content types including:

- **Modules** - Text & Images, Documents (Word, Excel, PowerPoint, PDF), Video, Audio
- **SCORM / Tin Can**
- **ILT Sessions** (Instructor Led Training) - this includes **Webinars**
- **Assignments**
- **Exams**
- **Surveys**

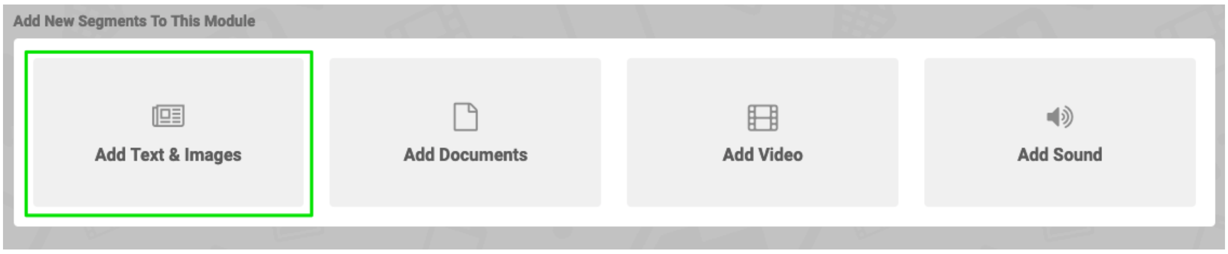


3.2.1 Add Module

Courses in LearnUpon are made up of building blocks called modules, which in turn are made of smaller building blocks called segments. All segments within a module will appear on a single page wherein the learner will scroll vertically. To move onto the next module, the learner will click the **Next Module** button which directs them to the next page.

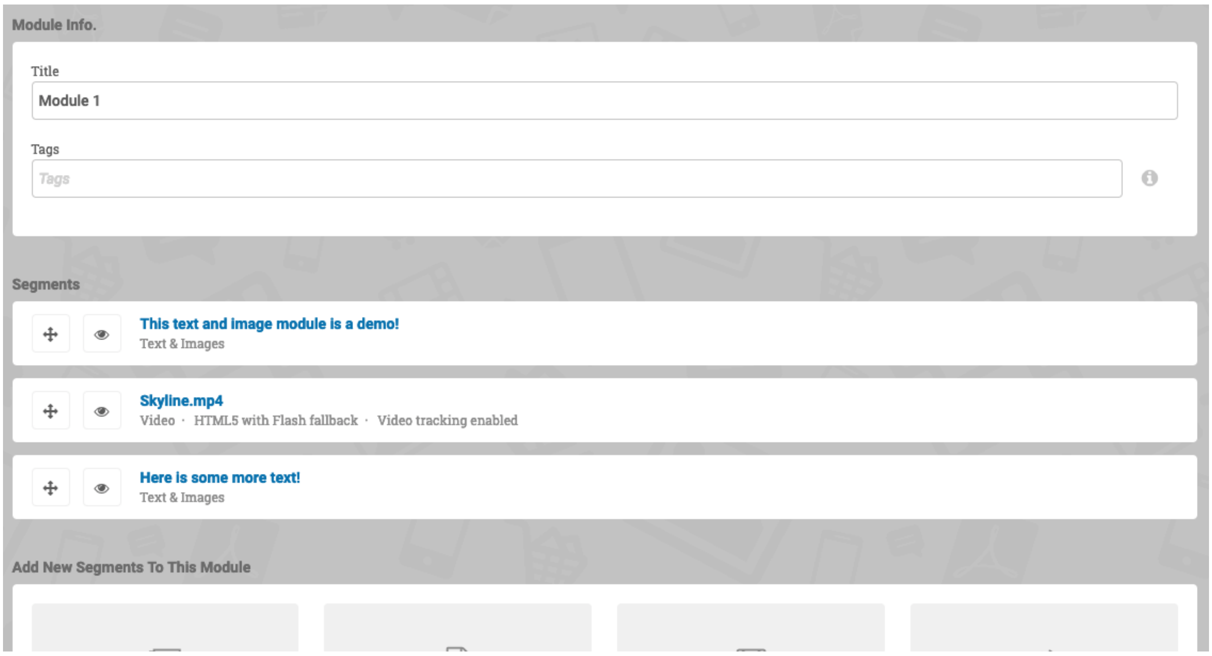
To add content to your course:

1. Navigate to **Courses > Course Name > Content**
2. Click the **Add Module** icon on the left or **Actions > Add Module**
3. Give your module a name and select **Save**

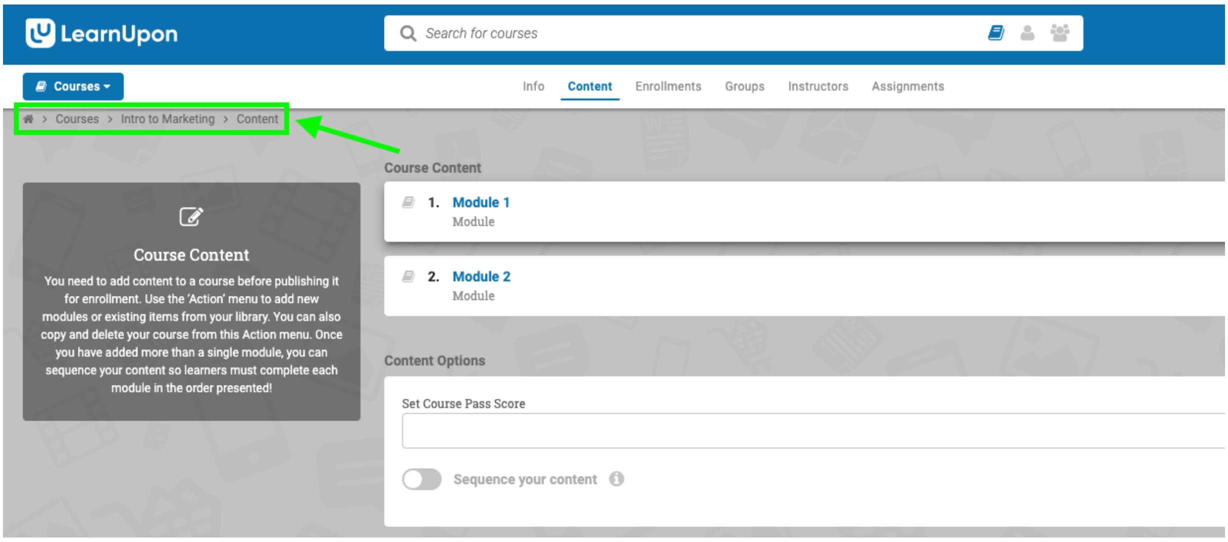


4. You will now be asked to choose a Segment to add to your Module. Click:
    a. **Add Text and Images** (to enter text, upload an image, embed a video, or add a link to an outside website or training resource)
    b. **Add Documents** (to upload a Word, PDF or PowerPoint document)
    c. **Add Video** (to upload a video file e.g. mp4, avi, wmv etc.)
    d. **Add Sound** (to upload an audio file e.g. mp3, aac, etc.)

5. Click **Upload File** to browse for and select the relevant file from your hard drive. Once selected it will automatically begin to import. Once imported, the encoding process begins..
6. Once your file has encoded, there will be different settings (described below) depending on which type of segment you've created. When you have chosen the appropriate settings for your segment, **Save.**
7. If additional information is wanted on the same "page" for the learner, continue to add more segments. To start a new "page" for the learner, select **Content** from the secondary navigation menu to add additional Modules.



***Tip**: You can also use the breadcrumb trail to navigate between pages.*



***Tip**: Once uploaded, you can drag and drop your Segments into whatever order you like e.g. you may wish to add a text instruction Segment to a video Segment (i.e. recommending to watch in full-screen mode). Once added, just drag the text Segment above the Video Segment etc.*

Add Text & Images

Add Text & Images will open the Text and Image Editor. This allows for:

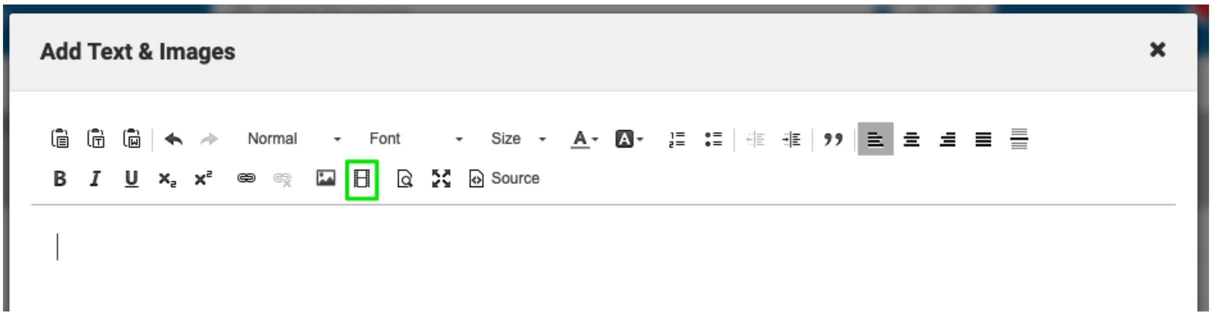
- Rich text editing (bold, underline, italic, coloring, bullet points, numbered lists etc.)
- Insertion and alignment of Images and links to external sites

- Embedding of Videos

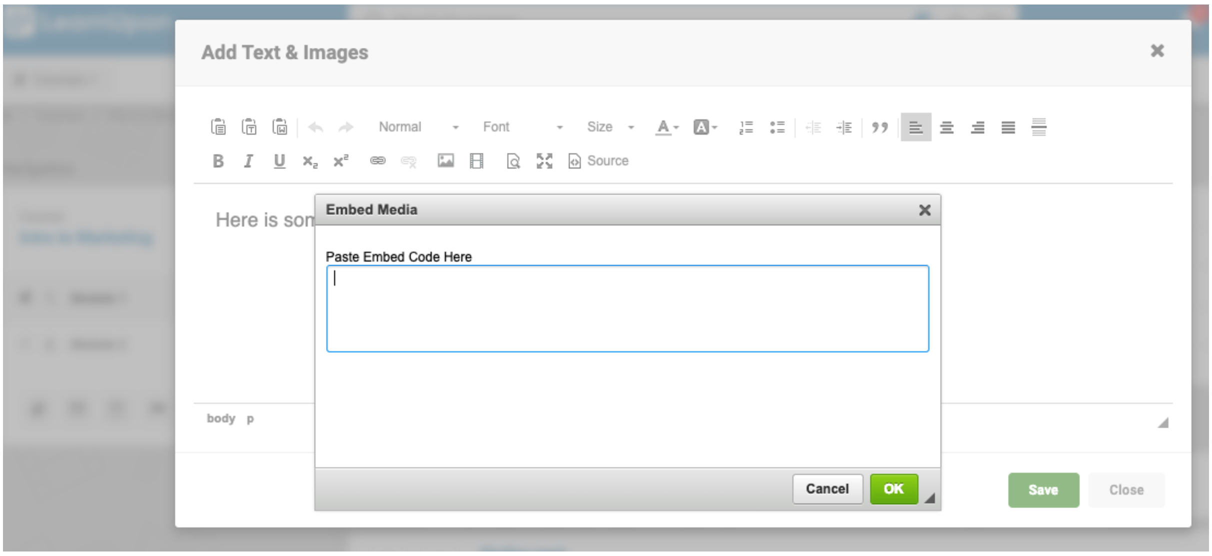
Embed Video

To embed a video:

1. Click the Embed Media Button :



2. Copy the embed code from your video/media sharing site (e.g. Youtube)
3. Paste the embed code as requested and click **OK**
4. The embedded video will now appear in your text editor box. Click **Save**

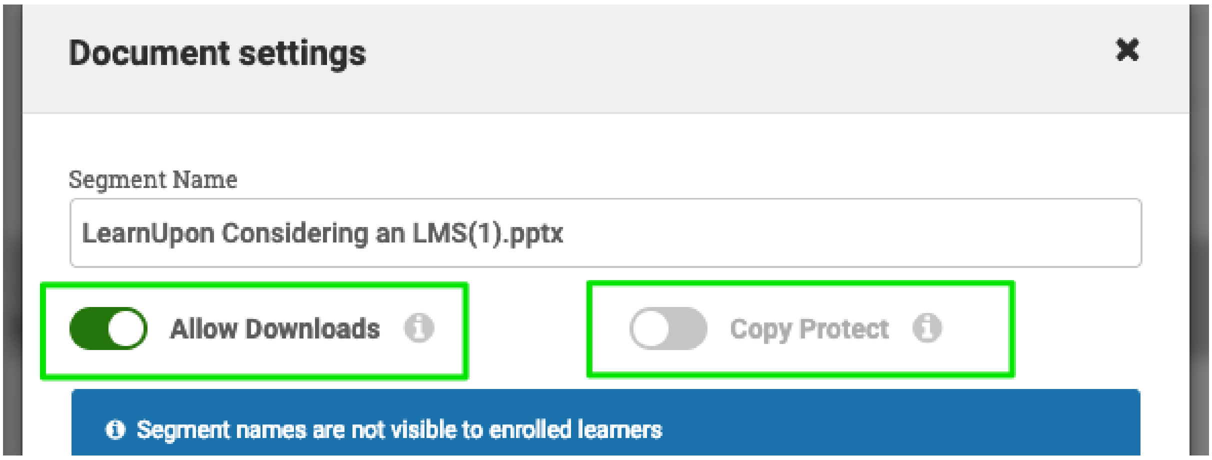


Add Documents

Once you choose **Add Documents**, you are asked to select the relevant file (e.g. Word, PDF, PowerPoint) from your hard drive to be uploaded. Once uploaded, your file will be encoded. Once the encoding process is completed, you can choose to:

- **Allow downloads** of the document by learners
- **Copy protect** the document preventing learners from copying and pasting its contents elsewhere

The default option for your Portal's documents (which can be reset within **Settings > Courses > General Settings**) is to disable downloads and copy protection. However, these default settings can be changed and overridden here on an individual basis as required.



***Note**: Copying of your content can never be fully prevented e.g. Learners could still take screenshots of your document pages and paste them into MS Word or other editing tool.*

Add Video

Adding a video (as opposed to embedding it) involves uploading a file from your hard drive. Once you select **Add Video**, you will be asked to select the relevant file (e.g. mp4, .avi, .wmv etc.) to be uploaded. Once uploaded, the video will also be automatically encoded and then video tracking can be put in place.

***Note**: Please do not navigate off the page while the file is uploading. The upload and encoding process can take a few minutes depending on the size of the file and the speed of your internet connection*

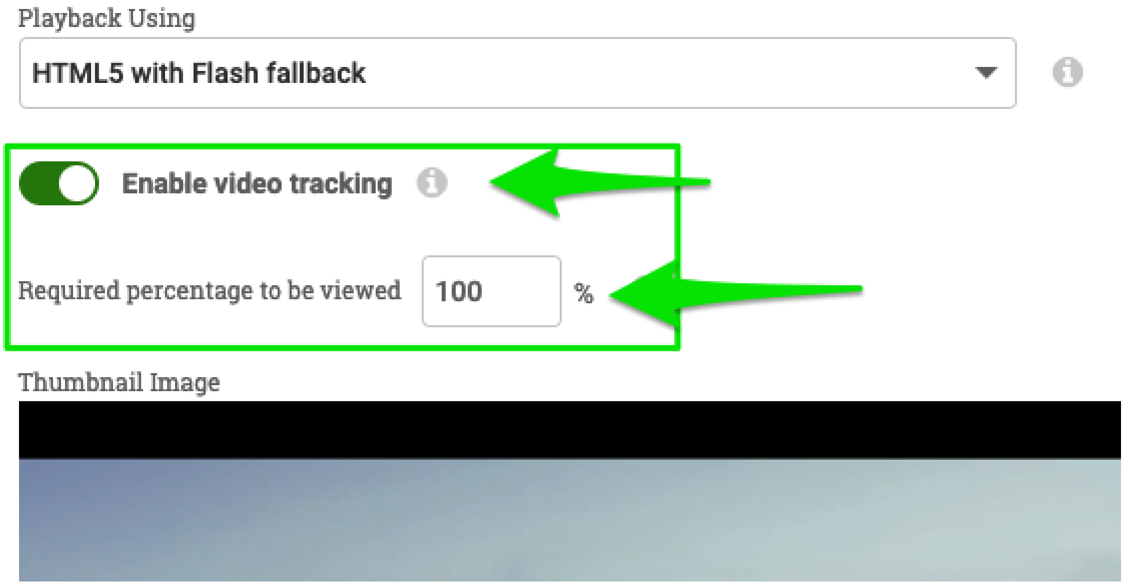
On completion of the upload and encoding process, you can enable video tracking and/or change the thumbnail image displayed for the video by selecting **choose thumbnail image**.

Video tracking prevents learners from skipping forward through the video content. If a learner navigates away from the module, the video will stop playing, their progress is bookmarked and when the learner returns to the video, it will pick up from where they left off.

To Enable Video Tracking:

1. Toggle on **Enable video tracking**
2. Enter the percentage of the video that must be viewed before a learner can move to the next module.

3. Click **Save**



***Tip**: Video Tracking enables highly accurate tracking and reporting. If you have Video Tracking enabled, when you run the Course Modules report, you can view the video percentage viewed by the Learner.*

Add Sound

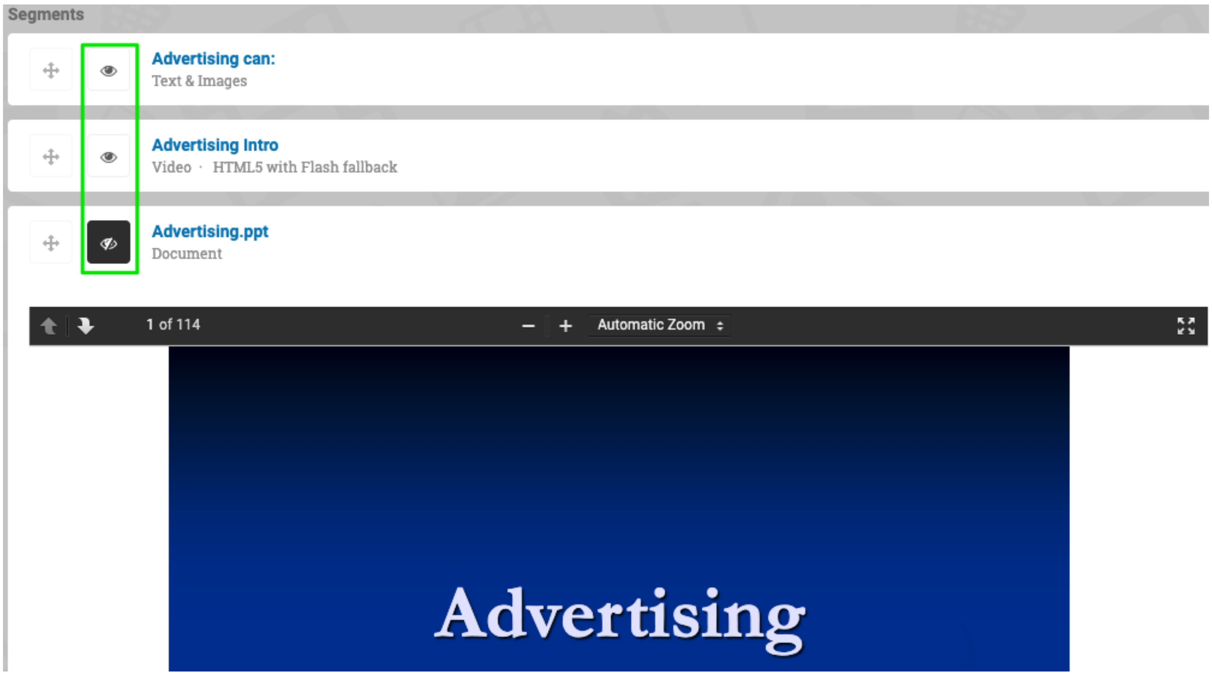
If you choose the **Add Sound** option, you'll select an audio file (e.g. mp3, .AAC etc.) to upload. It can take a few minutes to upload and encode depending on the size of the file and the speed of your internet connection. Please do not navigate off the page while this type of file is uploading.

Renaming Segments

For Text & Image segments, the title of a segment is drawn from the first line of text added to that segment. For Audio, Video, & Documents, the name of the segment will reflect the name of the uploaded document/file by default - the title of these segments can be easily changed.
Segment names are not visible to learners but to change the name of an audio, video, or document segment, follow the segment row to the right, select the ellipses and select edit. This will bring up a box where you can edit the name of the segment's title.

Previewing Segments

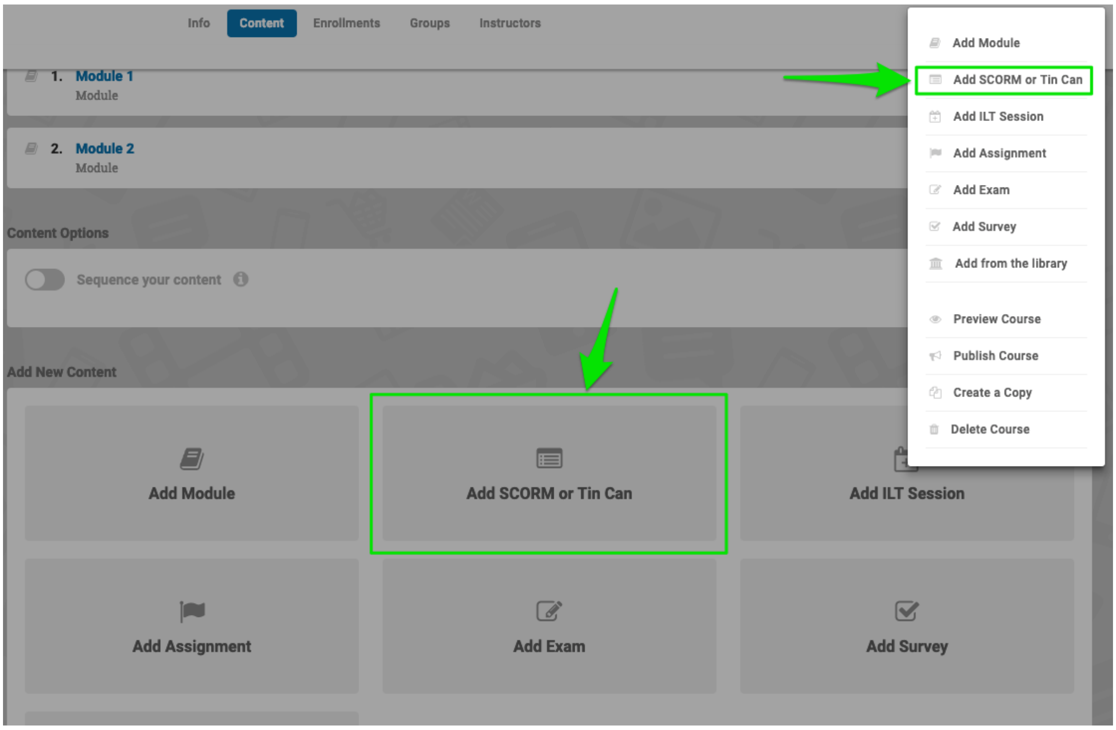
Clicking the eye icon will expand and collapse segments right within the page, allowing you to quickly preview that segment.



3.2.2 Add SCORM or Tin Can

To import a SCORM 1.2/Tin Can file:

1. Navigate to **Courses > Course Name > Content > Add SCORM or Tin Can**
   - Alternatively click the **Action > Add SCORM or Tin Can**



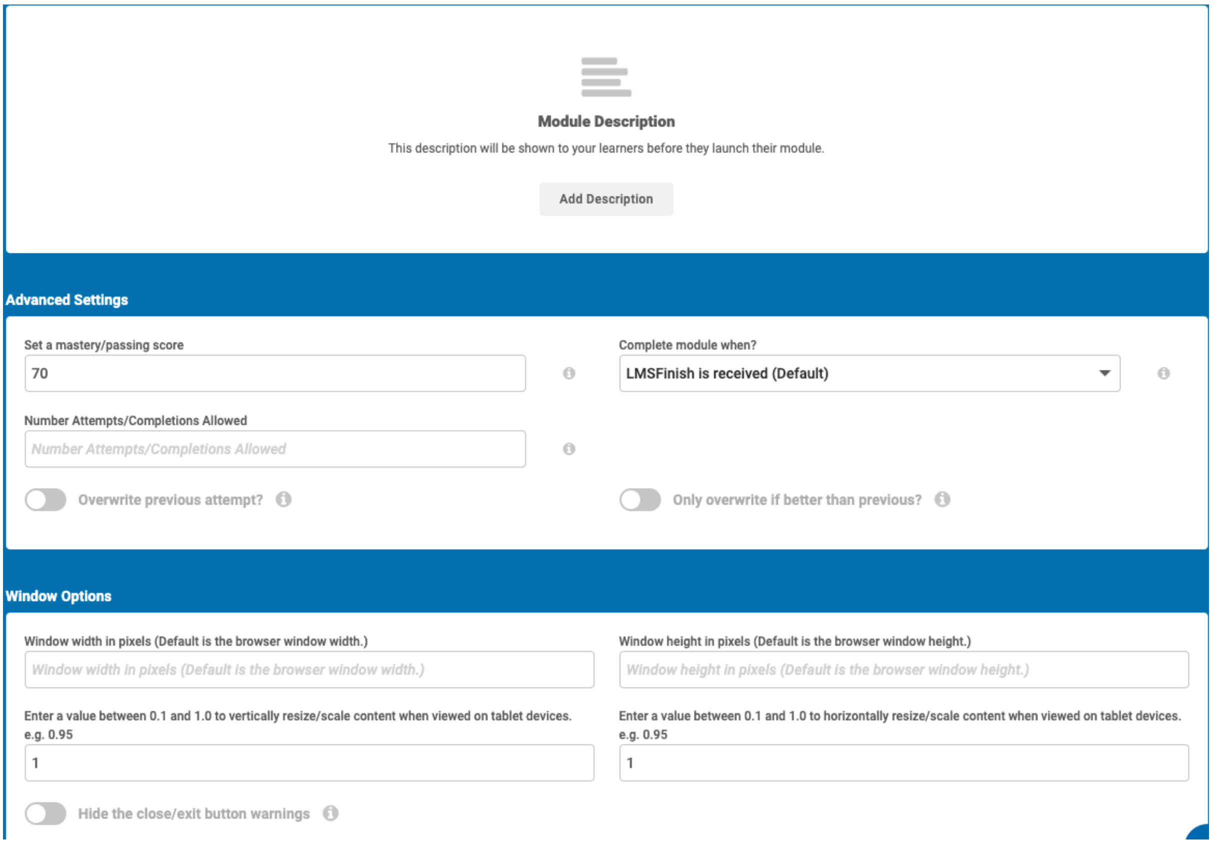
2. Click **Upload File** and select your zip file for upload
3. Your file will be imported into LearnUpon and encoded (depending on the size of your file, this might take a few minutes)
4. Edit the title if desired
5. Add a description to display prior to launching the module
    - For a SCORM course that is scorable, enter the Mastery/Passing Score
    - For a TinCan that is exam based, leave the my tincan is exam based toggled on

Advanced Settings - SCORM

Within Advanced Settings for a SCORM course, the following settings can be adjusted or overridden:

- Set the Mastery Score for any scorable/exam based module
- Override when the SCORM Module will be marked as complete
    - LMS Finish is Received (Default)
    - Score & LMS Finish is received
    - Only when Score received, even if zero
    - Only when Score received, but ignore zero scores

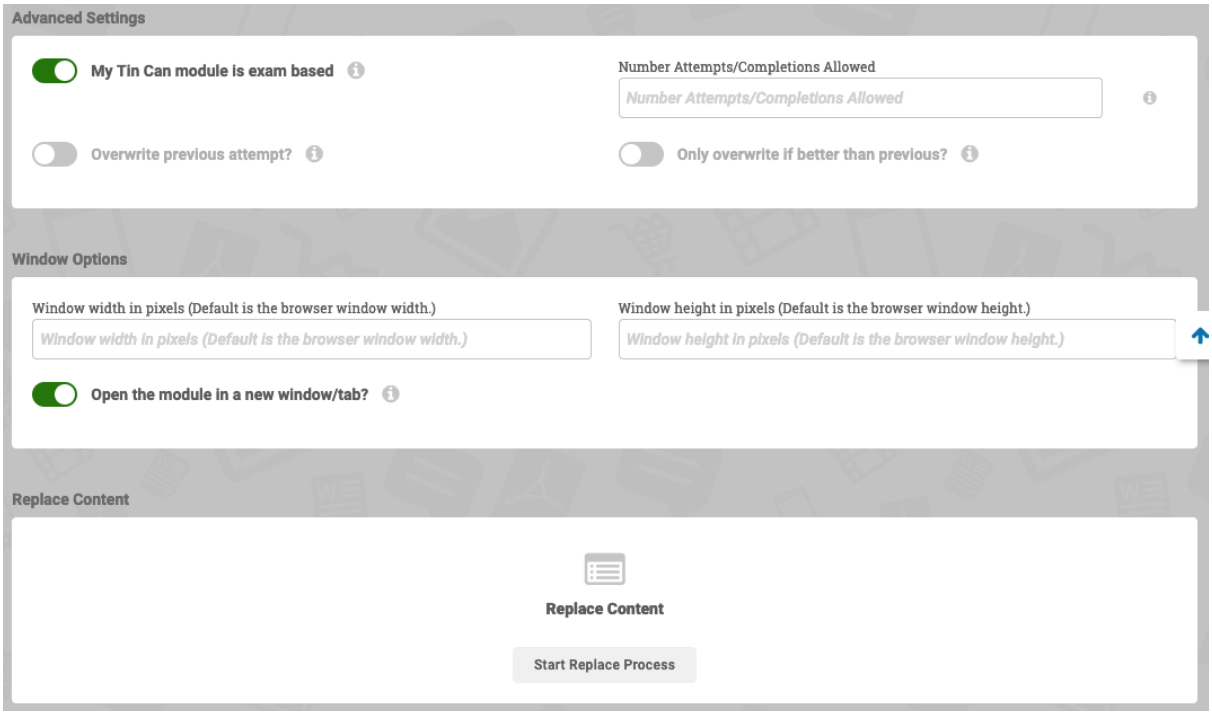
- Set the number of Attempts/Completions Allowed
- For SCORM courses where a learner is allowed to re-launch/re-attempt, the previous attempt can be set to be overwritten regardless of score or set to be overwritten only if the new score is better than the previous one
- Hide the close/exit button warnings.
- Override the default window sizing settings.



Advanced Settings - Tin Can

Within Advanced Settings for a Tin Can course, you can:

- Set the TinCan module as exam based
- Choose to have your Tin Can course open in a new window when launched (this is the default setting) or have it open in line within the same browser window
- For courses that a learner is allowed to re-launch/ re-attempt, the previous attempt can be set to be overwritten regardless of score or set to be overwritten only if the new score is better than the previous one
- Set the dimensions of the window in which the module will appear



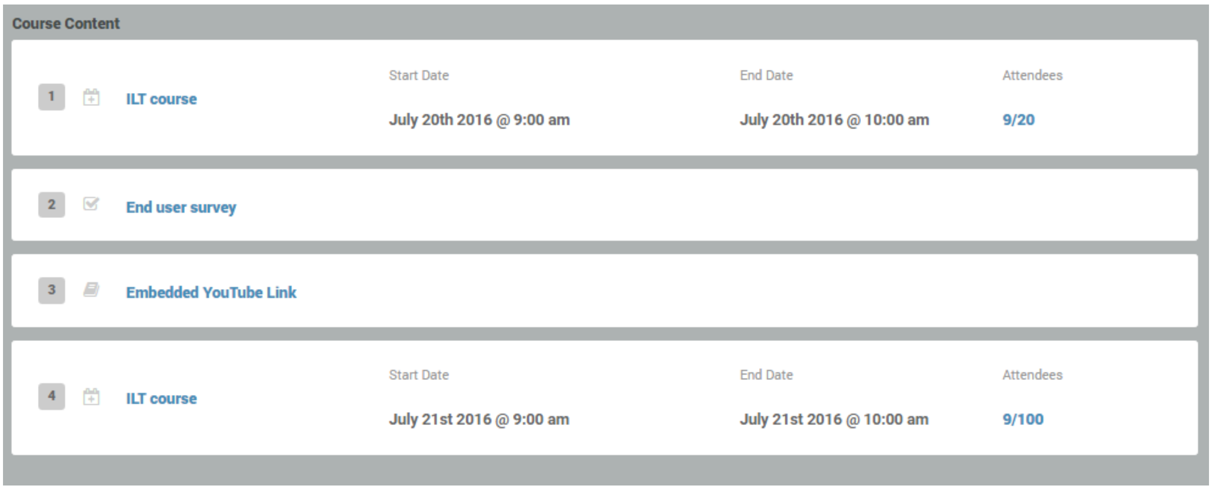
Replace Content

LearnUpon allows you to replace your SCORM or Tin Can content in a course without having to create and re-publish a new version of the course. Under the **Replace Content** heading, click the **Start Replace Process** button to remove your existing SCORM/Tin Can content and upload a new zip file. The new SCORM/Tin Can media will be immediately available to learners enrolled in the course.

> ***Tip:*** *If the error message "The imsmanifest.xml file is not in the root of your zip" appears 1. Unzip to your desktop 2. Navigate to the folder that was created 3. If the imsmanifest.xml or tincan.xml file is here, select all files and folders and re-zip. 4. If it's not there, navigate into the folder that's in the directory and it will be there. Highlight all files and folders and re-zip.*

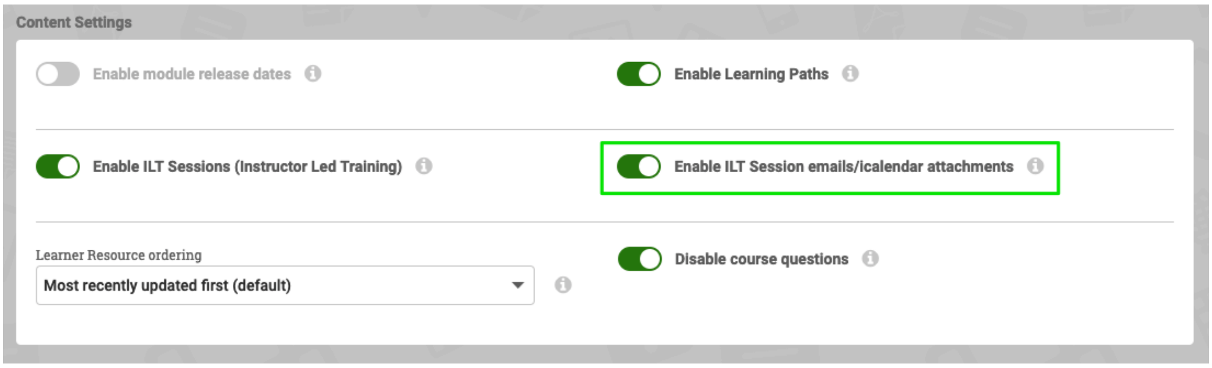
3.2.3 Add ILTs (Instructor Led Training)

ILT functionality allows you to schedule and manage classroom and webinar-based sessions (e.g. training events) through LearnUpon. These can either be standalone sessions or you can combine them with online course components. ILT sessions can be added to a course in the same way as other components such as documents, video, SCORM, assignments, exams and surveys, allowing you to design courses with the best of what self-paced eLearning has to offer blended with instructor-led classroom, or webinar-based, training.



Setting up ILT Functionality Settings

Before you can add and schedule ILT sessions to your course, you must enable ILT functionality within your settings. Navigate to **Settings > Courses > General Settings** and **Enable ILT Sessions.** You will notice a new **Enable ILT Session emails/iCalendar attachments** option appears :



Enabling this setting will:

- Send your learner/ instructor an iCalendar invite (iCal email Attachment) for the sessions they are due to attend
- Send updated iCal emails to enrolled learners when you update or cancel their sessions

The next step is to setup your ILT Session locations:

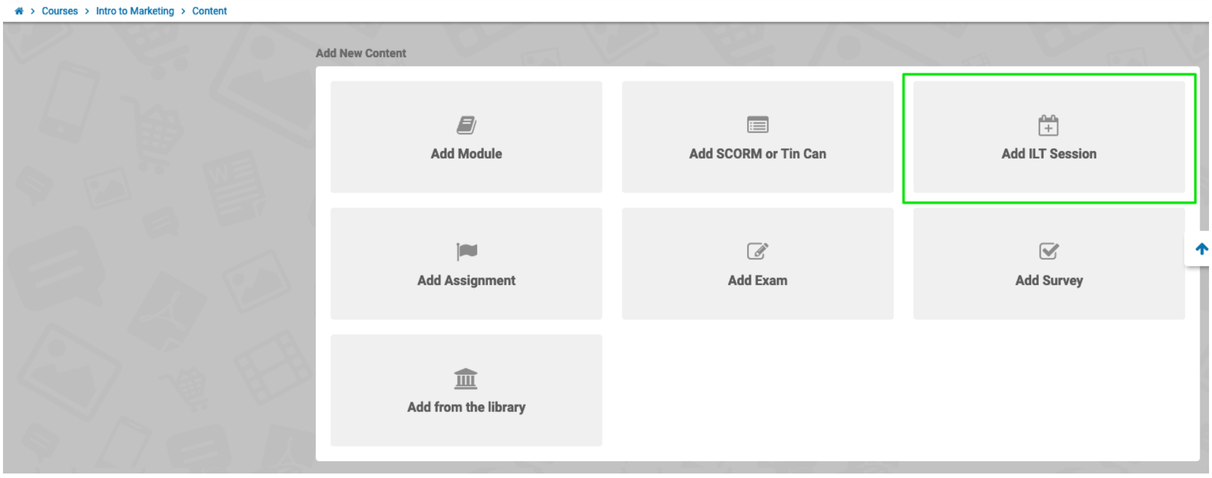
1. From **Settings > Courses** > **ILT Session Locations**, click **Add New Location** (top right)
2. Enter the location details, including timezone and click **Save**
3. Repeat for all anticipated ILT session locations

You can set up as many training locations as needed, and edit/delete them at any time. All locations have an associated time-zone, which is used for sending out iCal invites to learners who register for a training session at a particular location.

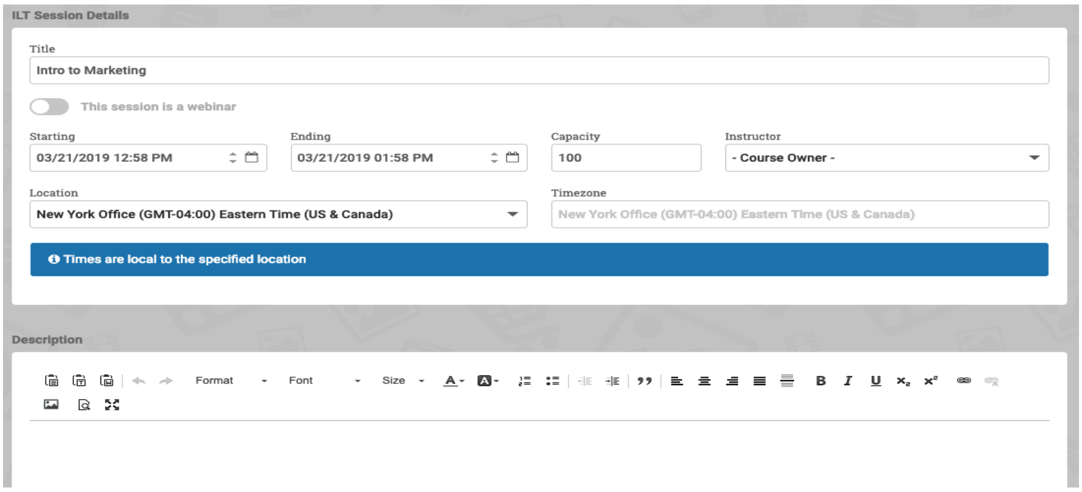
Scheduling your ILT Session(s)

You are now ready to add ILT Session(s) to your Course! To do this:

1. Select **Courses** from the primary navigation menu
2. Click into the relevant course
3. Select **Content** from the secondary navigation menu
4. Click **Add ILT Session** or the **Action** button and select **Add ILT Session**



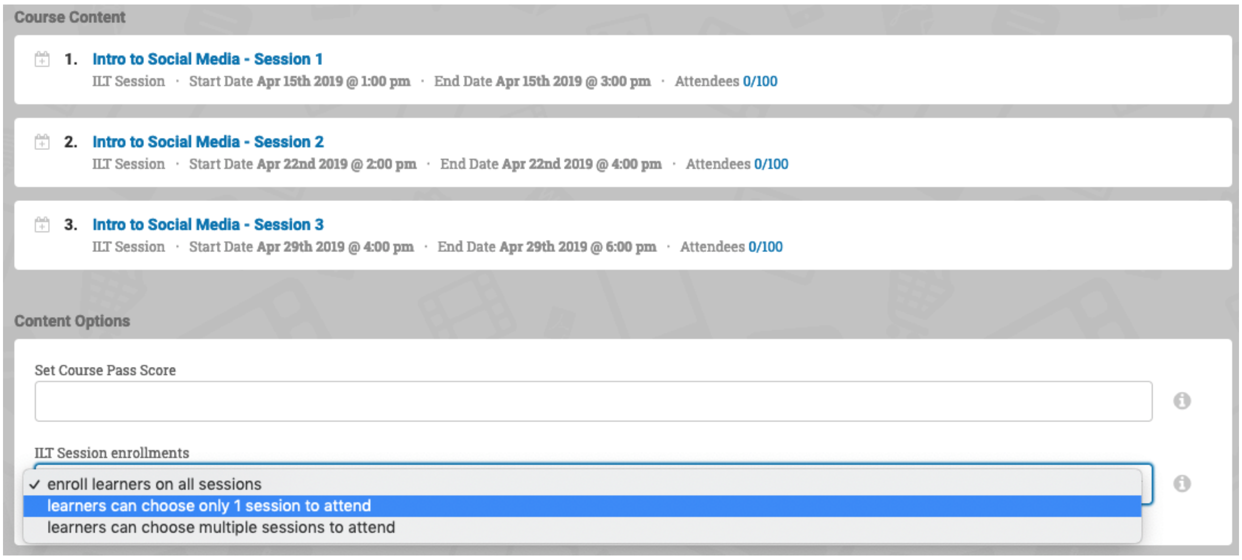
5. Next, enter your ILT session details including:
   - Session name (this defaults to the name of the course)
   - Description (again this defaults to your course description if one was entered)
   - Capacity (the maximum number of attendees)
   - Date/ Time (including time zone)
   - Location (from a dropdown menu of locations previously created in settings)
   - Instructor (defaults to course owner)
6. **Save**



Multiple ILT Sessions on a Single Course

LearnUpon enables you to schedule multiple ILT sessions and allows your learners choose which one they wish to attend. You can choose from three options when multiple ILT sessions are available on a single course :

- **Enroll learners on all sessions** - enrolled learners will automatically be enrolled in all ILT sessions
- **Learners can choose only 1 session to attend** - enrolled learners will be given the option, after they log in, to choose one of the available ILT sessions
- **Learners can choose multiple sessions to attend** - enrolled learners will be given the option, after they log in, to choose one or multiple of the available ILT sessions

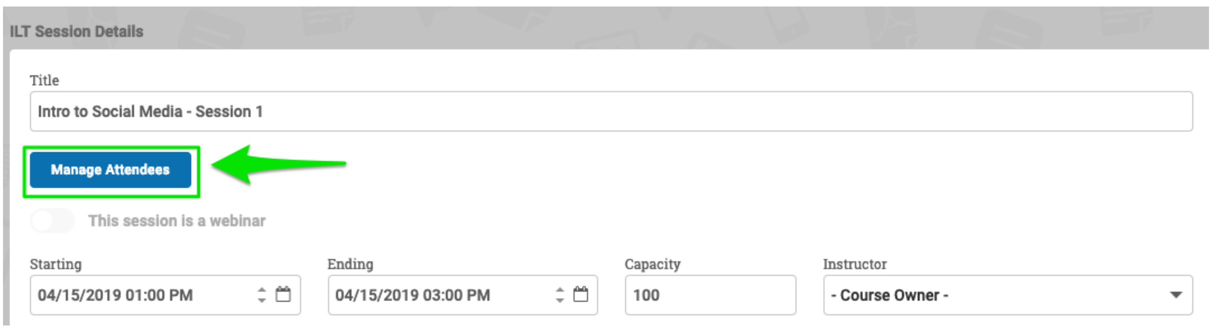


Tip: *ILT Based Courses can also be displayed in your Storefront for sale. See* ***Section 14*** *for further information.*

Managing Attendees

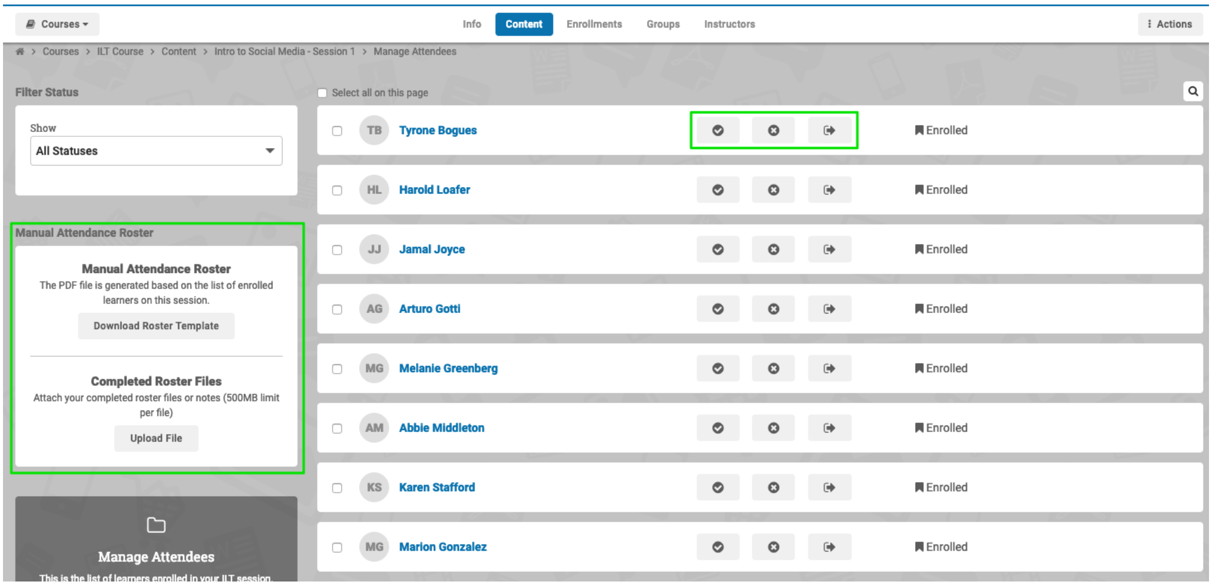
Prior to the ILT session taking place, you can print off a roster of all the learners enrolled to attend (e.g. to gather signatures etc.). To do this:

1. Select **Courses** from the primary navigation menu
2. Click into the relevant course and then ILT session
3. You will be taken to the ILT **Session Details** screen
4. Click **Manage Attendees** on the ILT session details screen



5. Click **Download Roster Template** and print off if required

Once the ILT session is over, you can also upload a completed roster file. To do this, click the **Upload File** option .



***Tip**: An upload of a completed roster file can be useful for a number of reasons e.g. it may contain a signature of the Learner to confirm their attendance etc.*

From this screen, you can also:

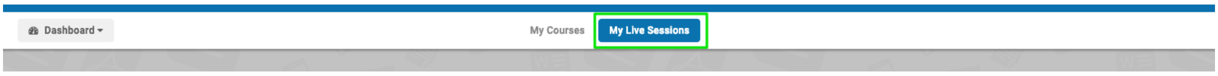
- Individually mark learners as attended, no show/cancelled or partially attended
- Choose to mark all learners as attended, no show/cancelled or partially attended
- Select certain learners (only) and mark them as attended, no show/cancelled or partially attended:

When marking a learner as Attended, you have the option to enter a score (which in turn can be used to award a certificate and/or learning credits). When marking a learner as Cancelled or No Show, you can choose if the learner should remain enrolled or not on the course. When marking a learner as Partially Attended, you can enter the period of time for which the learner was in attendance.

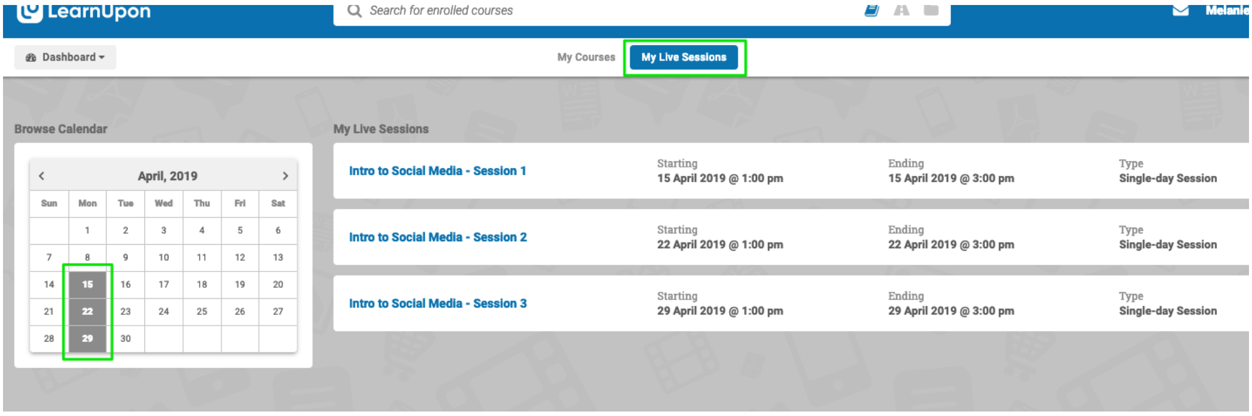
***Tip:** You can assign one or more Instructors to your ILT session using the Instructors tab. If you have multiple Instructors assigned to your Course, then for each ILT Session, you can choose to assign a particular Instructor to lead that session if you want.*

ILT Calendars & Notifications

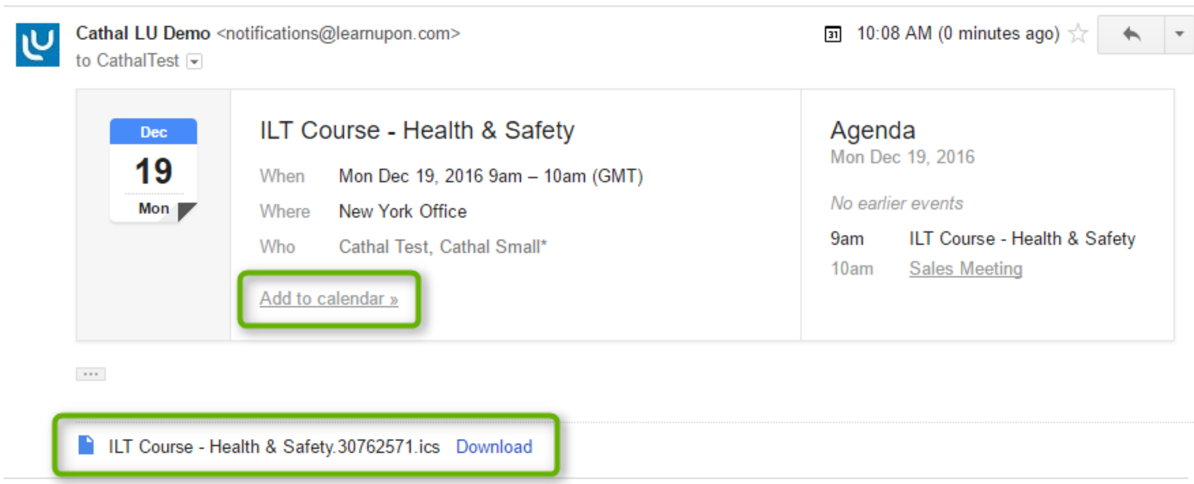
If a learner is enrolled on one or more ILT sessions, they can view these in their Dashboard by selecting **My Live Sessions** on their secondary navigation menu **.**



Here, they can see a list of their ILT sessions or browse them via an ILT calendar view (ILT calendars must first be enabled under **settings > dashboard settings**). The dates of the ILT courses will appear on the calendar with a link to the ILT training information.



Upon enrollment in an ILT session, learners will receive an email confirming the session date/time with a calendar attachment so the session can be added to their calendar



3.2.4 Add Webinar

LearnUpon allows you to schedule live training webinars within a LearnUpon course. You can create or link to a webinar session, manage enrollment and attendance, and import attendance data, using ILT functionality.
Prior to adding a webinar, you must first integrate your LearnUpon portal with your webinar provider account. LearnUpon integrates with the following webinar providers:

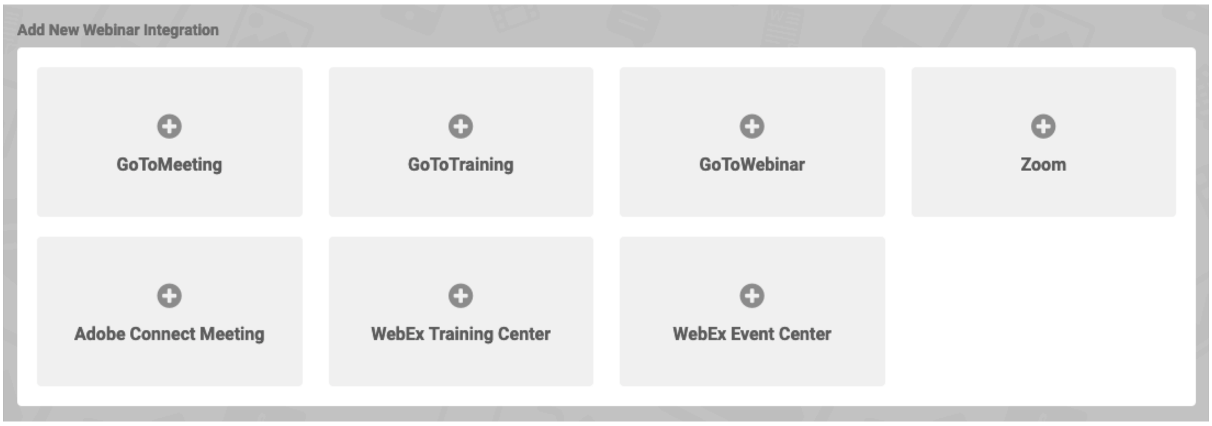
- Adobe Connect
- Citrix GoToMeeting
- Citrix GoToTraining

- Citrix GoToWebinar
- WebEx Event Center
- WebEx Training Center
- Zoom

***Note**: Please note the Webinar integration is only available on certain plans*

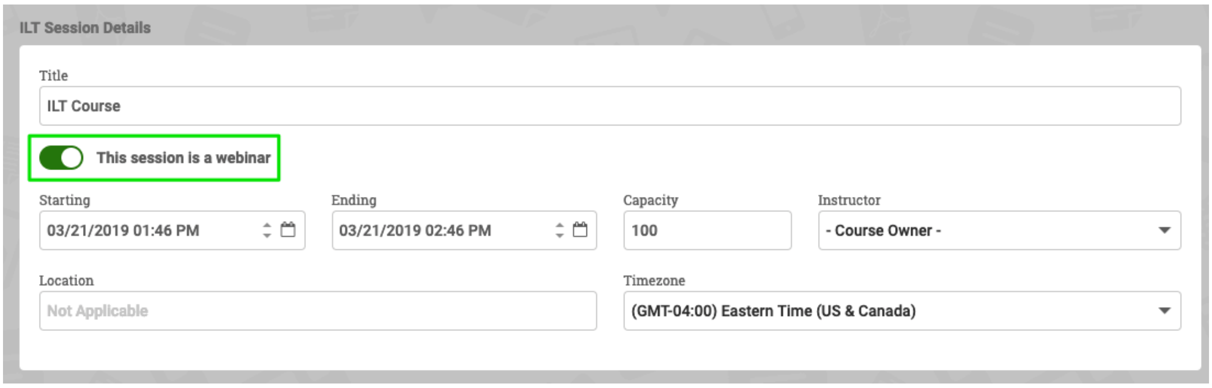
A webinar account can be added to your LearnUpon Portal as follows:

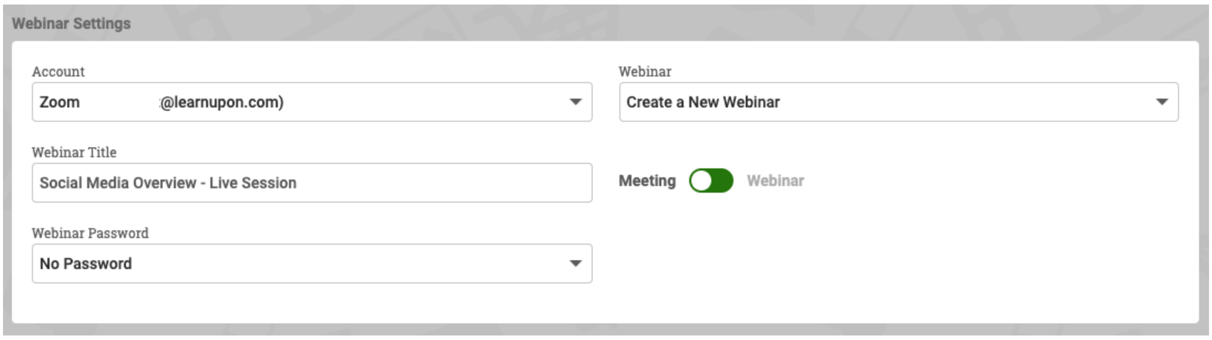
1. Navigate to **Settings > Integrations > Webinar Integration**
2. Select the webinar service you want to integrate
3. Follow the prompts and fill in your account information
4. **Save**



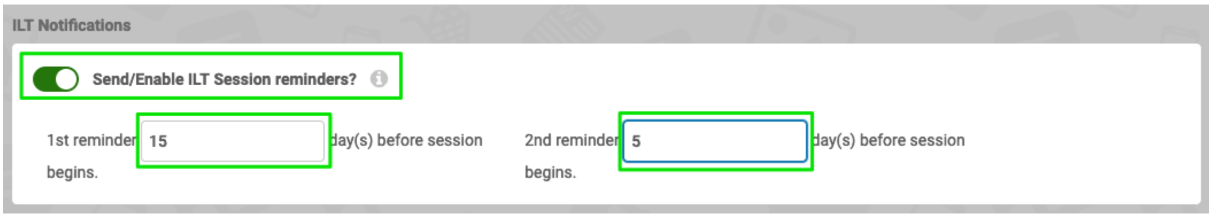
Once successfully integrated, you can add a webinar ILT to one of your courses as follows:

1. Navigate to **Courses >** ***Course Name*** **> Content > Add ILT Session**
2. Retitle the ILT session, if you choose (the title will automatically pull from the course name)
3. Enter data for the webinar capacity, date and time
4. Enable the **Webinar** toggle switch
5. Click **Save**
6. You will be presented with a new **Webinar Settings** menu.
7. Select your account from the drop-down menu and then choose to either **create a new webinar** or link to an existing one.
8. If you **Create a new Webinar**, you will be asked to enter a Webinar title, optional password and description, and click **Save**.
9. Once created, your new webinar details will sync with your webinar provider account and the session will be mirrored there automatically.
10. If you link to an existing webinar, please note that the webinar date and time must match exactly the webinar/meeting details within your webinar provider account.

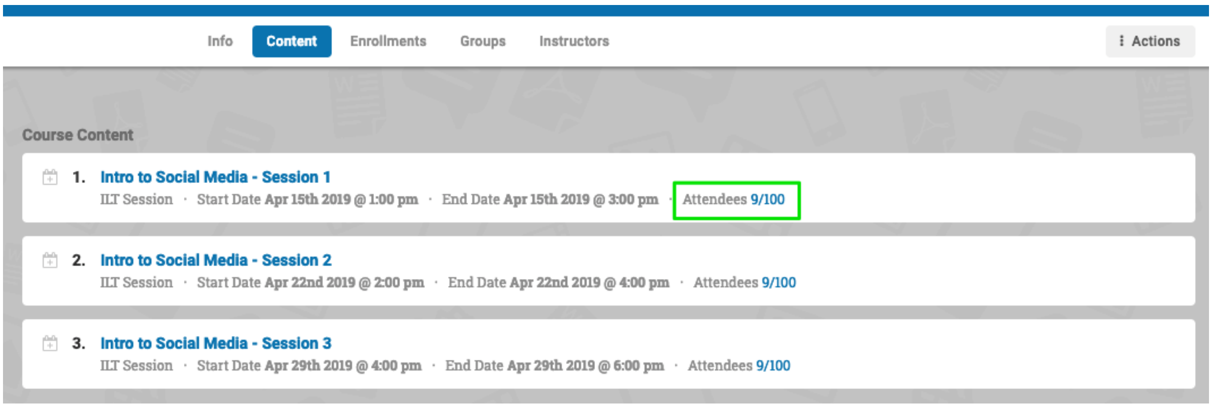




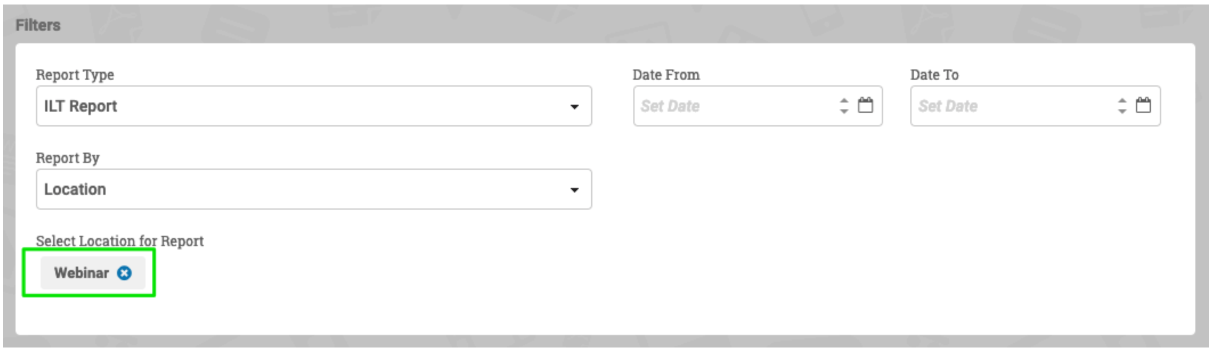
All learners enrolled on your webinar will receive a calendar invite bookmarking the session with their login instructions and password details included. Optional enrollment and reminder emails can also be set up under **Courses >** ***Course name*** **> Notifications Options > ILT Notifications**.



When the webinar is complete, attendance data will be synced with your ILT session and stored for future reference. To view and edit this data select **Courses >** ***Course Name*** **> Content > Manage Attendees**.



You can also run an ILT report to view and monitor webinar attendance .



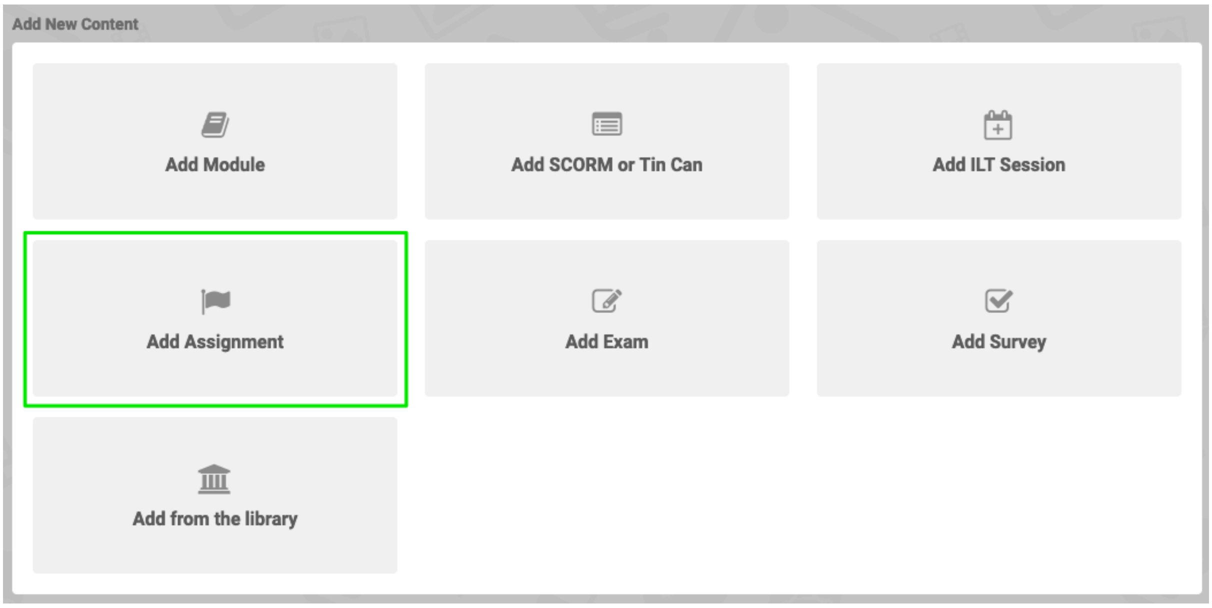
3.2.5 Add Assignments

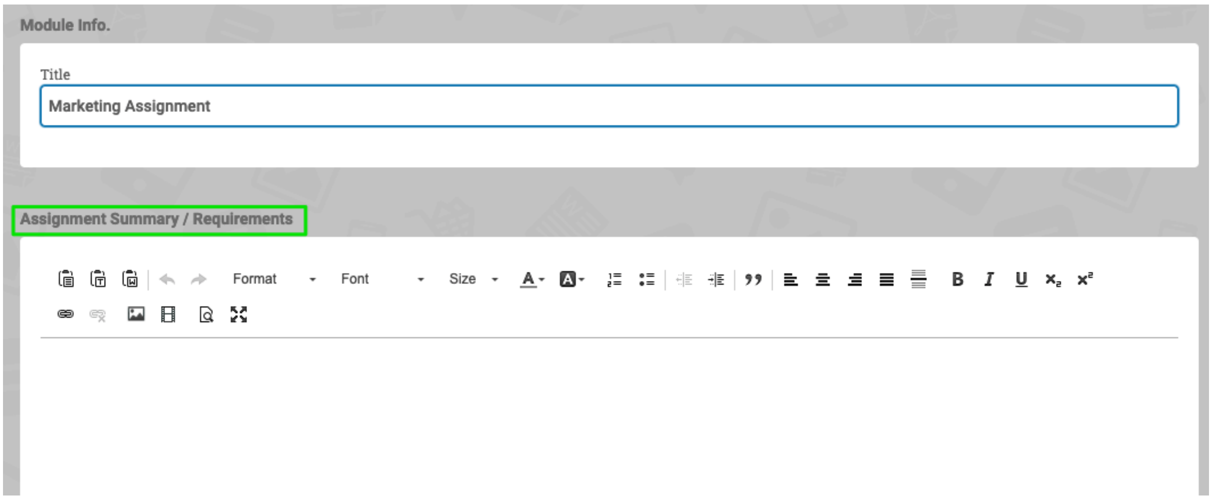
Assignments are very useful if you wish to require work submitted by your learners to be reviewed and graded by a Course Owner or instructor. You can also enable an auto-correction feature if you want work to be submitted by your learner that does not require review/correction.

Note: Assignments are not available on all plans. Speak to you CSM for more information on Assignments if you do not see this feature in your portal.

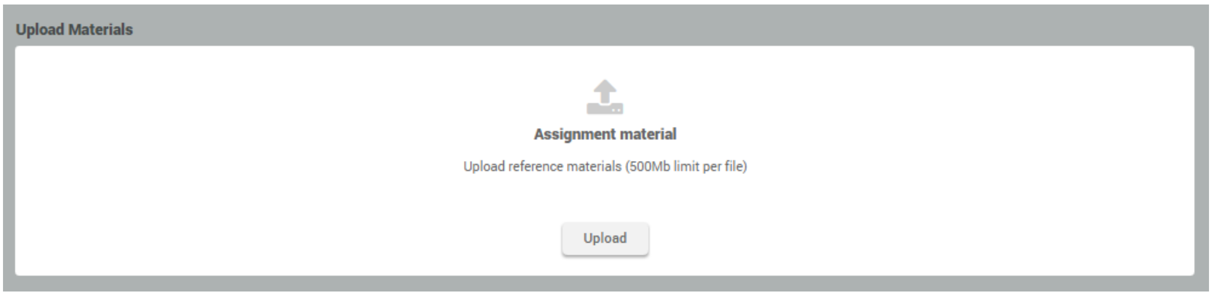
To add an Assignment to your Course:

1. Navigate to **Courses > *Course name* > Content > Add assignment**
2. Name your Assignment and enter an **Assignment Summary / Requirements**. This is where you provide instruction to your learner about what is required.





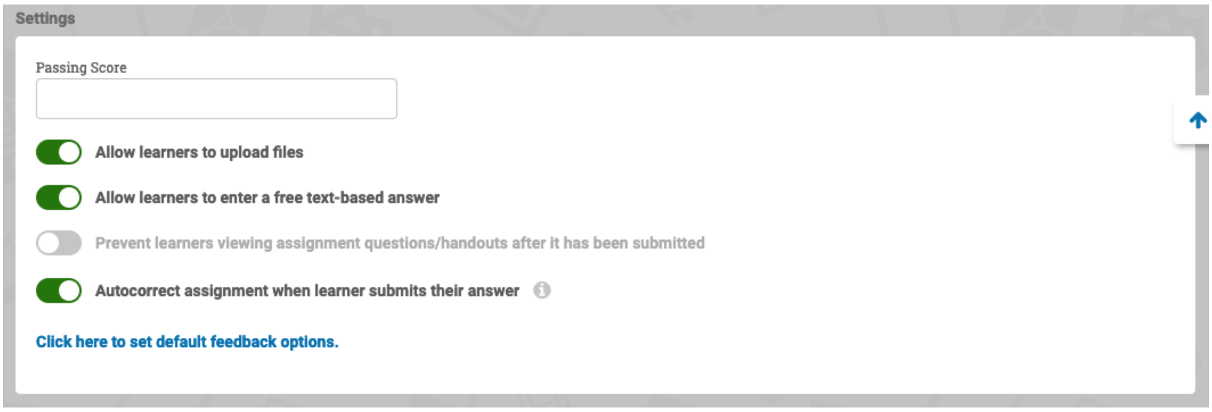
Once you have saved your Assignment, you will see an additional option appear enabling you to upload Assignment materials for your learners to access. Here, you can attach one or more documents, which the learner can download and review as part of their Assignment. This feature is very useful if you have a particular template or workbook that you want the learner to complete (and potentially re-upload) as part of their Assignment.



Note: *Learners can be asked to upload any type of document or file as part of their Assignment, e.g. Word, PowerPoint, PDF, Video, Audio, etc. They can also upload multiple files for review.*

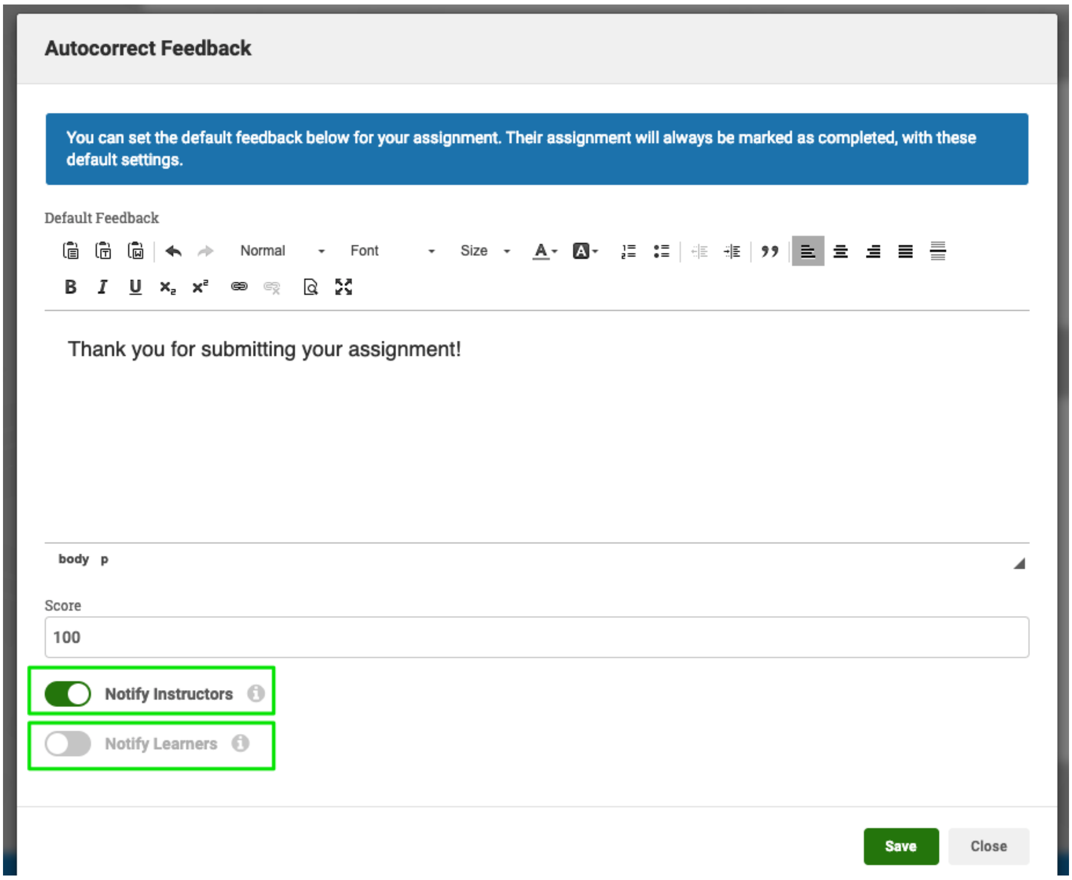
If you scroll further down the page, you will see a number of settings relating to your Assignment:

- Set a Passing Score for the Assignment
- Enable the learner to upload files (see above)
- Provide the learner with a free text-based answer box to write their responses
- Disable the learner viewing Assignment questions/handouts after submission
- Enable auto-correction of learner assignments after submission



The autocorrect assignment option allows the learner to submit an Assignment that does not require individual feedback or grading. Instead, the learner receives a generic feedback message (and optional grade) e.g. confirming that the Assignment is complete.

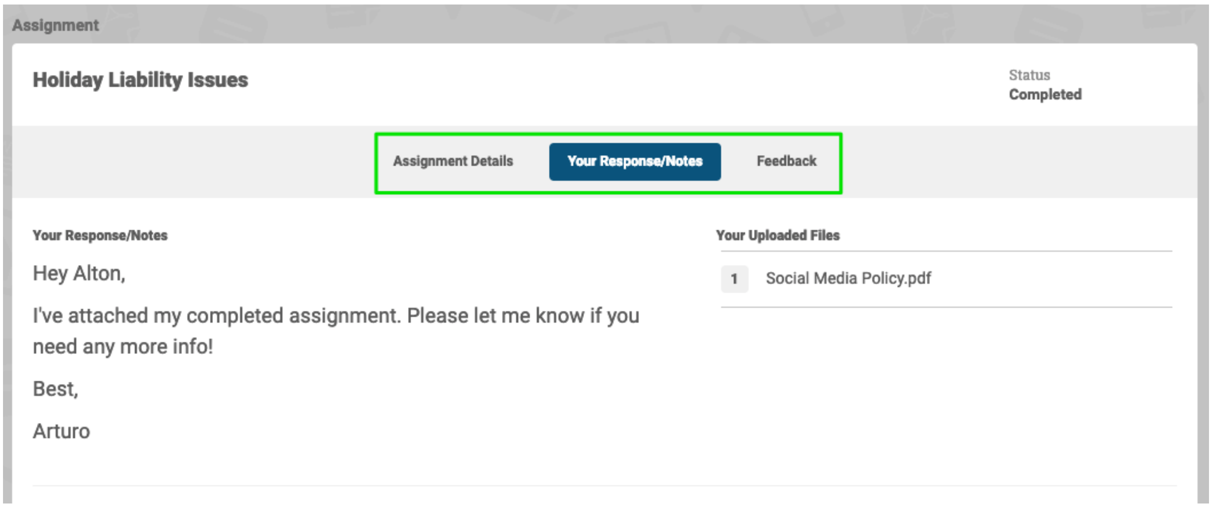
If you enable auto-correct, you can **Click here to set default feedback options** to customize your message. Here, you can also choose if you would like to notify instructors and/or learners when feedback has been sent.



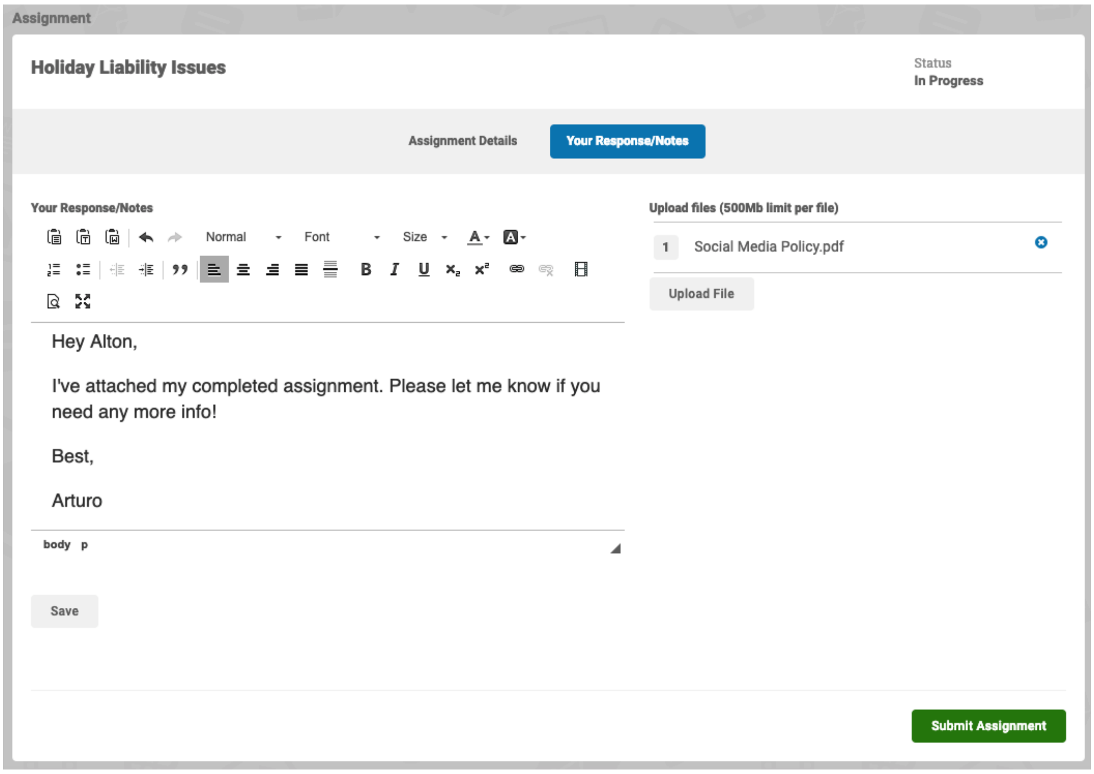
Learner Assignment Completion

When a learner is taking a Course and reaches an Assignment module, they are presented with the screen shown in. Here, there are two sub-menu headings:

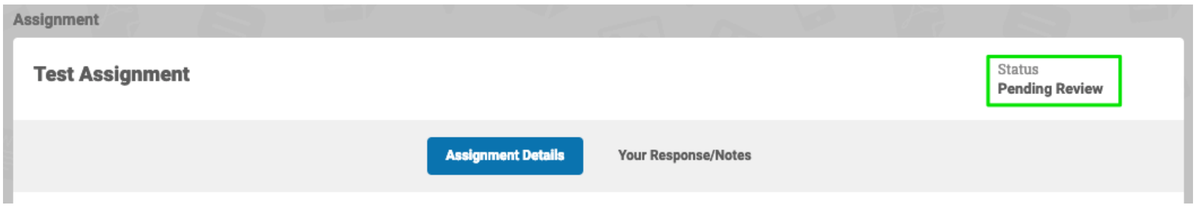
- **Assignment Details** - instructions to the learner on how to complete the Assignment
- **Your Responses/Notes** - the learner can type or upload their submission and/ or any comments for the instructor here



Once a learner has responded completely, in the form of either an uploaded file, written text or a combination of the two, they should click **Submit Assignment**.



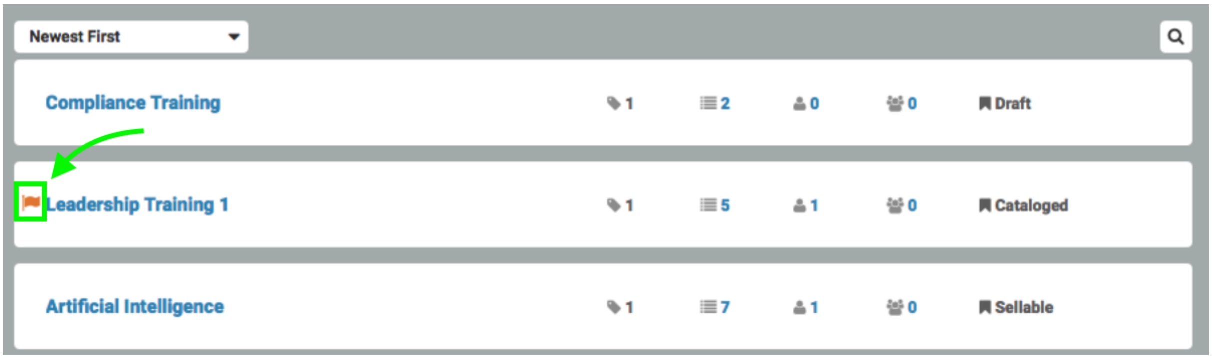
Following submission, the status of the course which includes the assignment changes to **Pending Review** (unless Assignment auto-correction has been enabled).



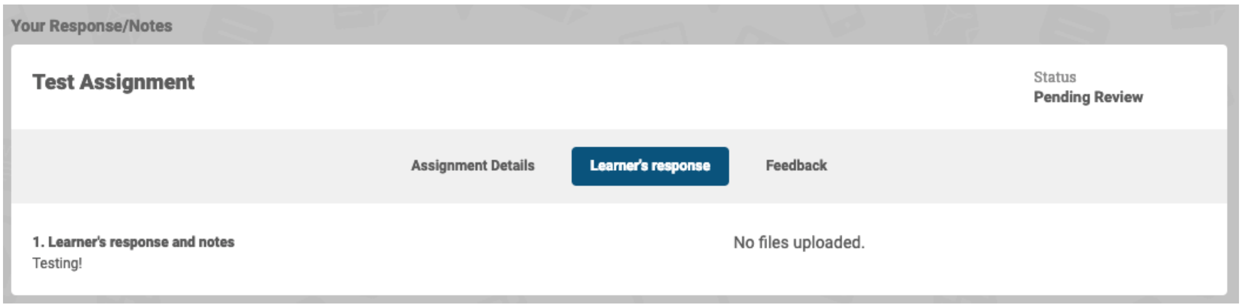
Instructor Assignment Review

Once a learner submits an assignment, the instructor receives an email, including a link, to inform them that there is a new assignment to be reviewed. Once clicked by the instructor, the link takes them (post log-in) to an Assignments section where they can review any outstanding assignments.

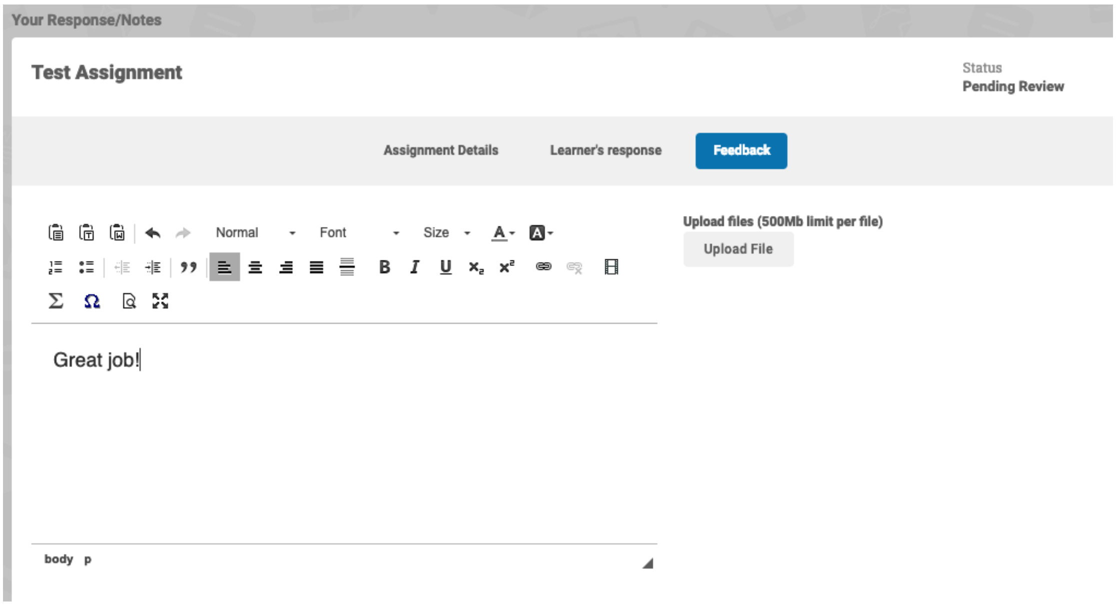
Any Courses that have assignments pending review will also be highlighted with an alert icon on the main course list screen .



Once the instructor clicks on the **Pending Review** link for an assignment, they are brought to a new screen. From here, the instructor can download the learner's assignment for review, as well as review any comments submitted .



The instructor should then click on **Feedback & Score.** From here they will be able to add comments on the learner's assignment, upload feedback documents as required, and optionally grade the assignment



The instructor can choose to save their feedback and return to it later (if required) prior to clicking **Submit Feedback**. When the instructor submits their final feedback, they have the option to let LearnUpon systemically determine whether the learner passed or failed depending on the assignment score given, or they can choose to manually set a score / course status for the learner themselves.

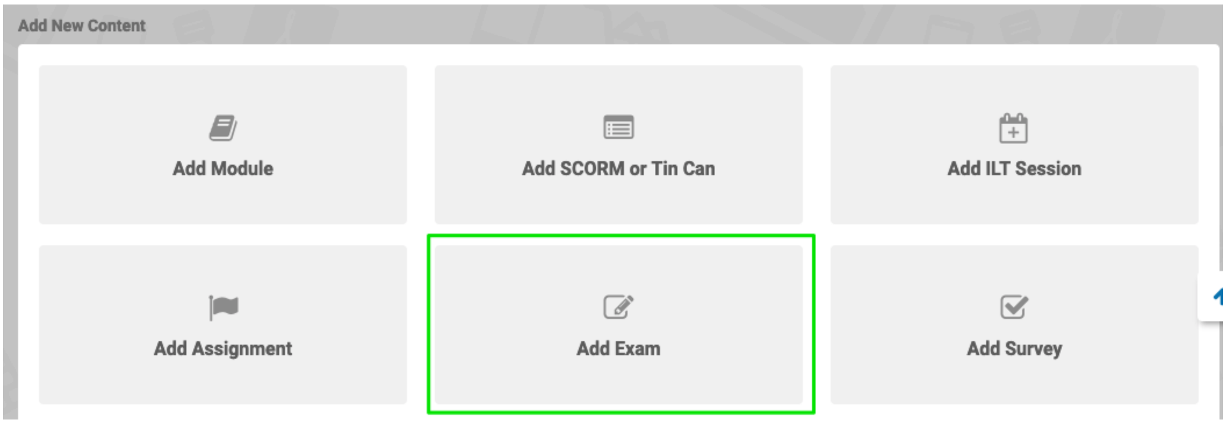
Once the instructor has submitted feedback and graded the assignment, the learner will get an email notification containing a link. When the learner clicks on the link (and logs into LearnUpon), they will be brought to the course content screen where they can click to view the instructor's feedback and download any documents the instructor may have uploaded.

***Tip**: Following assignment completion, if all other modules have also been completed, the course moves from the "Pending Review" to "Completed" card on the learner's dashboard.*

3.2.6 Add Exams

Exams are one of LearnUpon's most useful features. An exam can be created and included in your course to test your learners' knowledge. To create an exam:

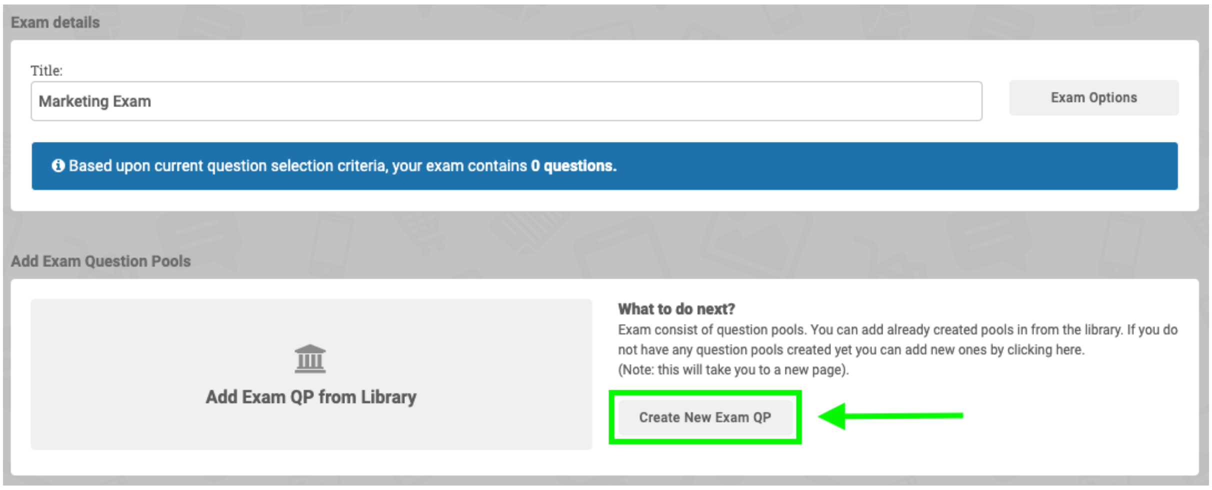
1. Navigate to **Courses > *Course name* > Content > Add Exam**
2. Name the exam and click **Save**



This will create a shell for your exam. The next step is to import questions from your Question Pools. (see below)

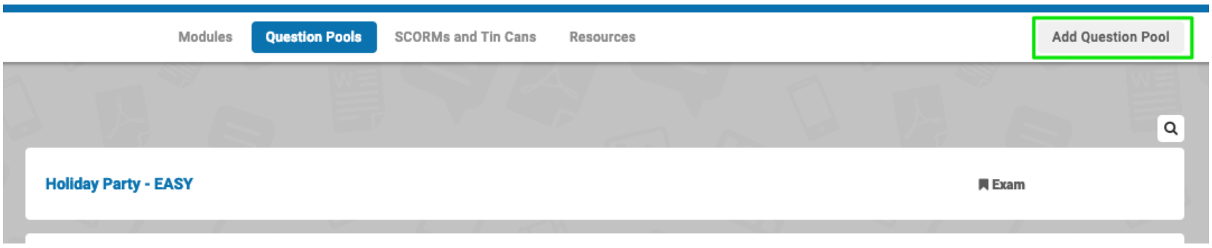
Question Pools

LearnUpon exams are created from question pools. A question pool is a group of questions created and stored in your library that can be reused across any exam. For example, you could have a question pool consisting of social media questions or another consisting of health and safety questions, etc. An exam can be made up of multiple question pools.
To create a question pool, click the **Create New Exam QP** button, which appears on the Exam Details page

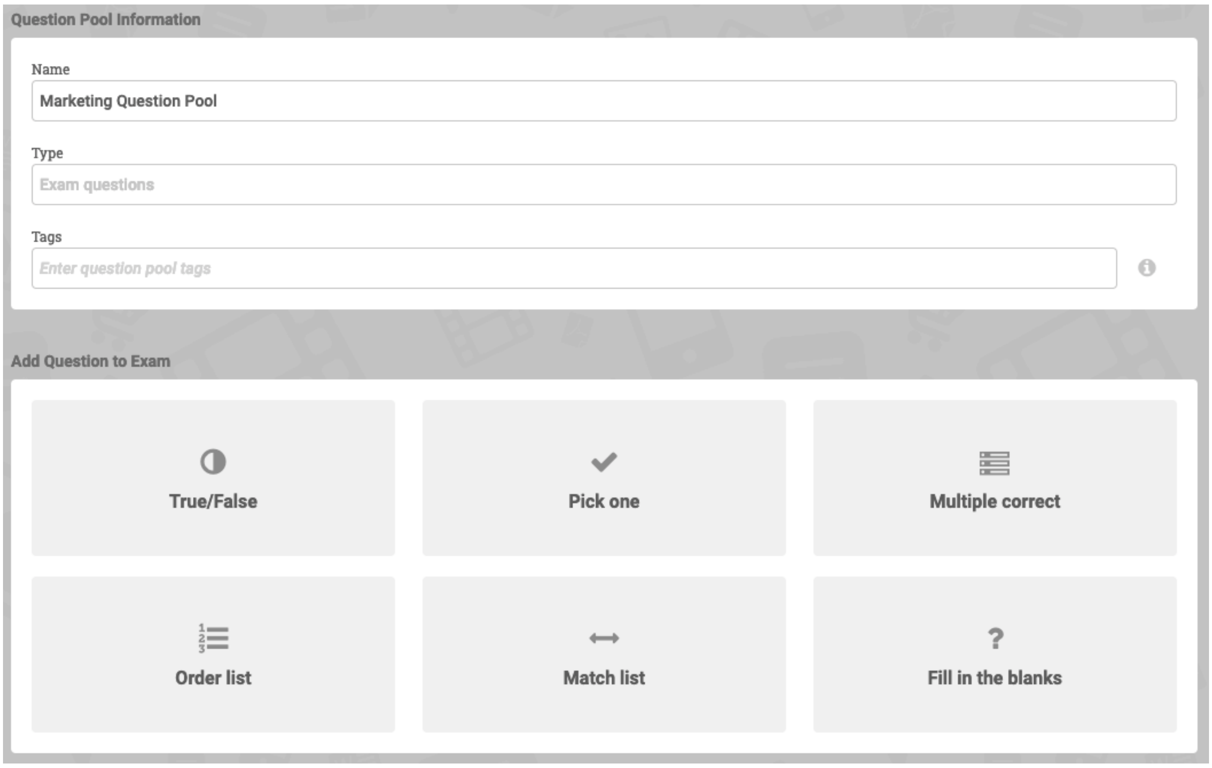


Alternatively, you can create a Question Pool from your Library as follows:

1. Select **Library** from the primary navigation menu
2. Select **Question Pools** from the secondary navigation menu
3. Click the **Add Question Pool** button
4. Name your question pool and click **Save**



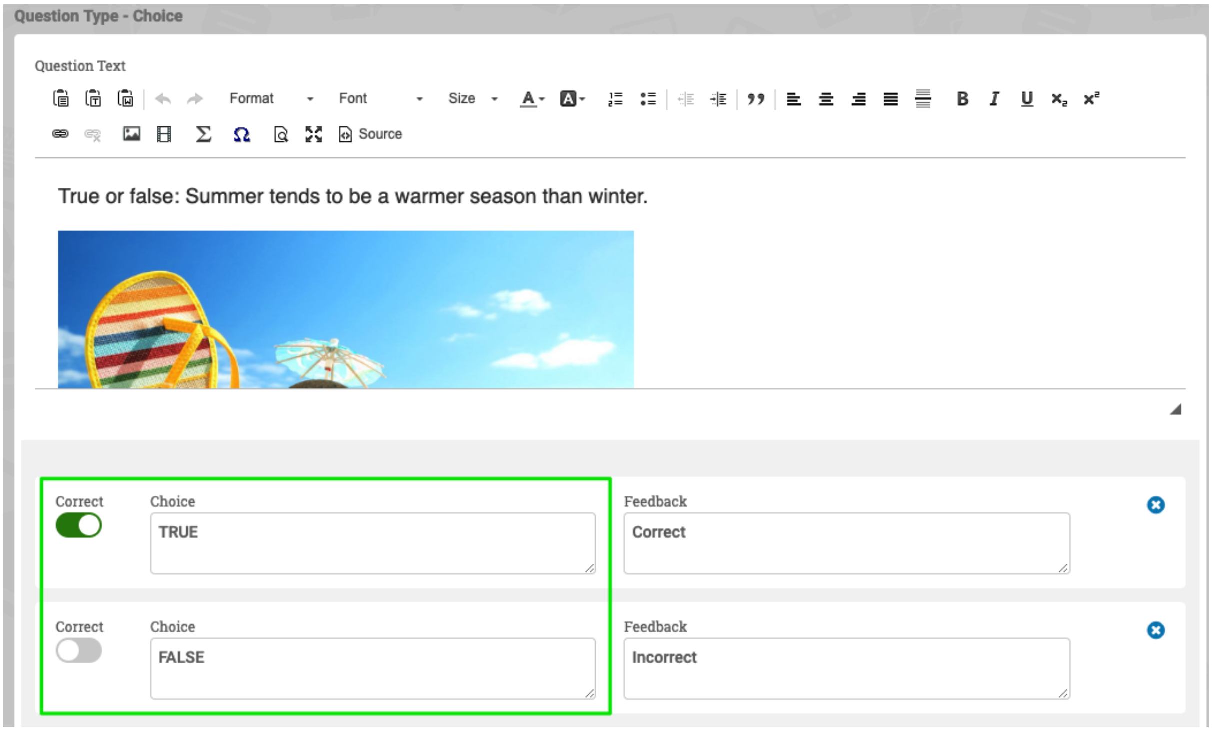
You will now be asked to add questions to your question pool :



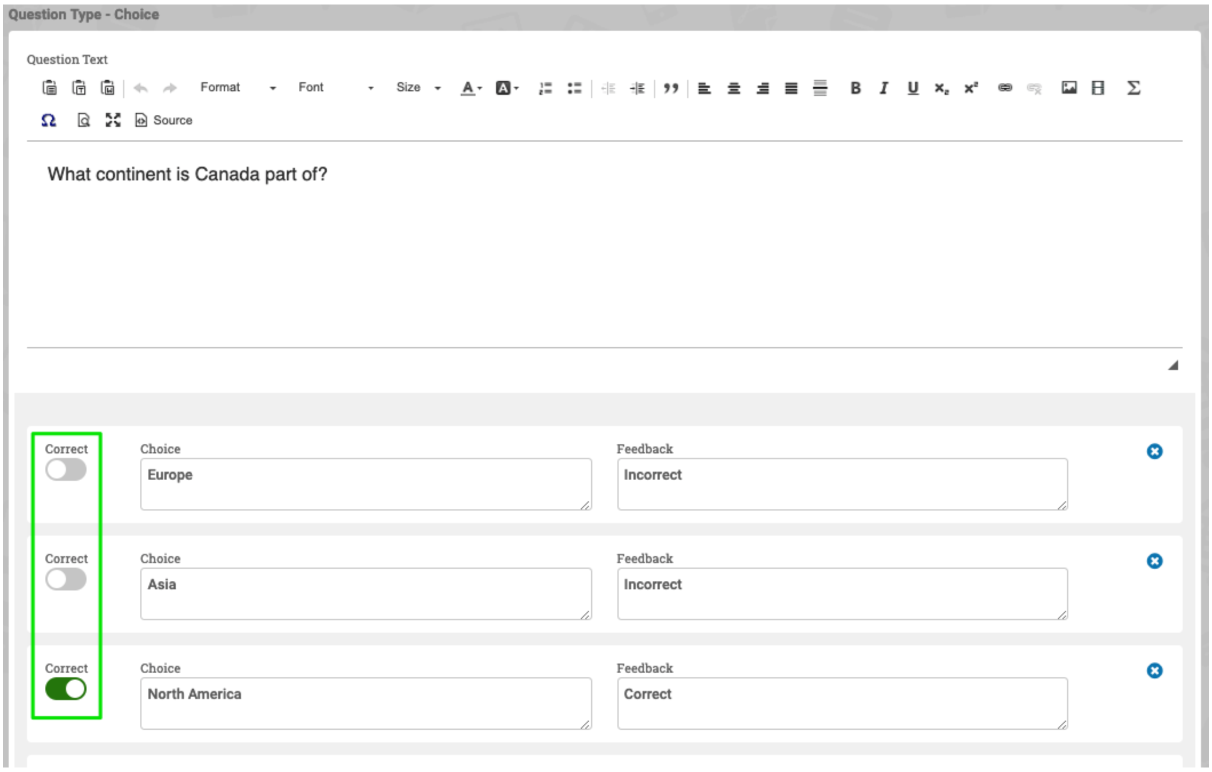
Question Types

There are six exam question types in LearnUpon. They are:

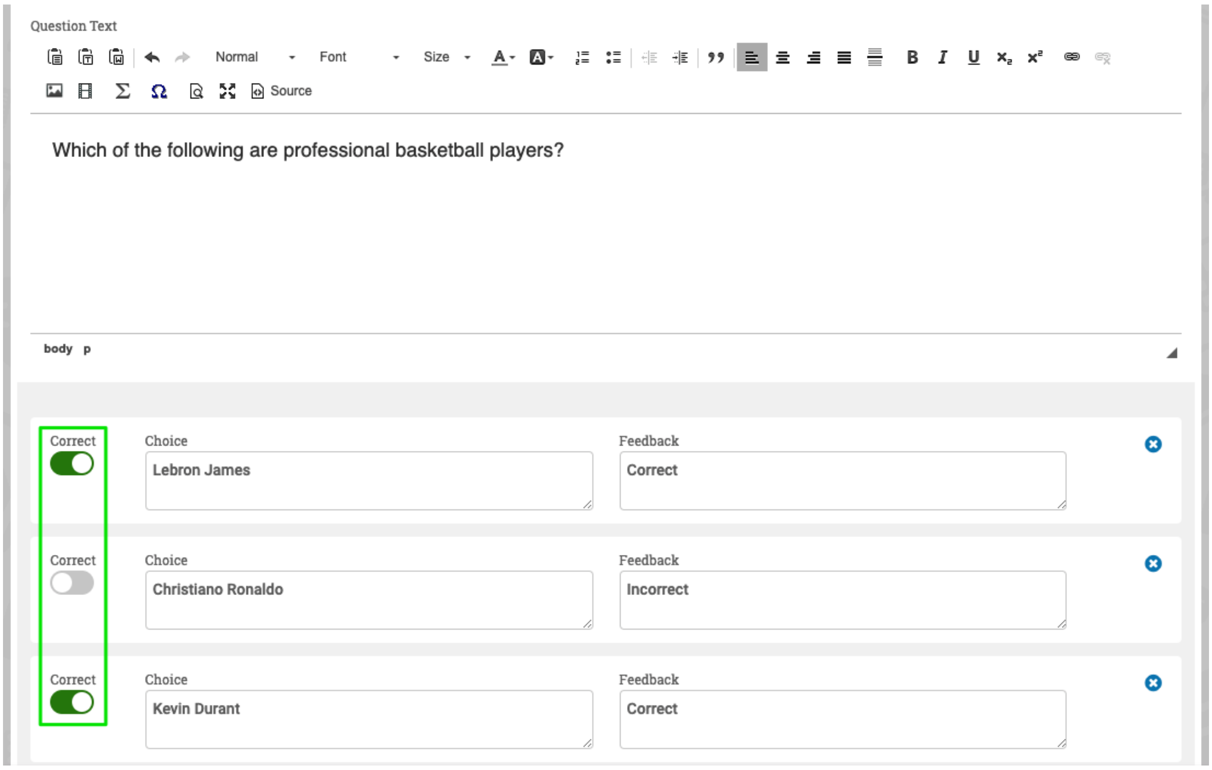
1. **True / False:** The learner answers true or false to a statement :



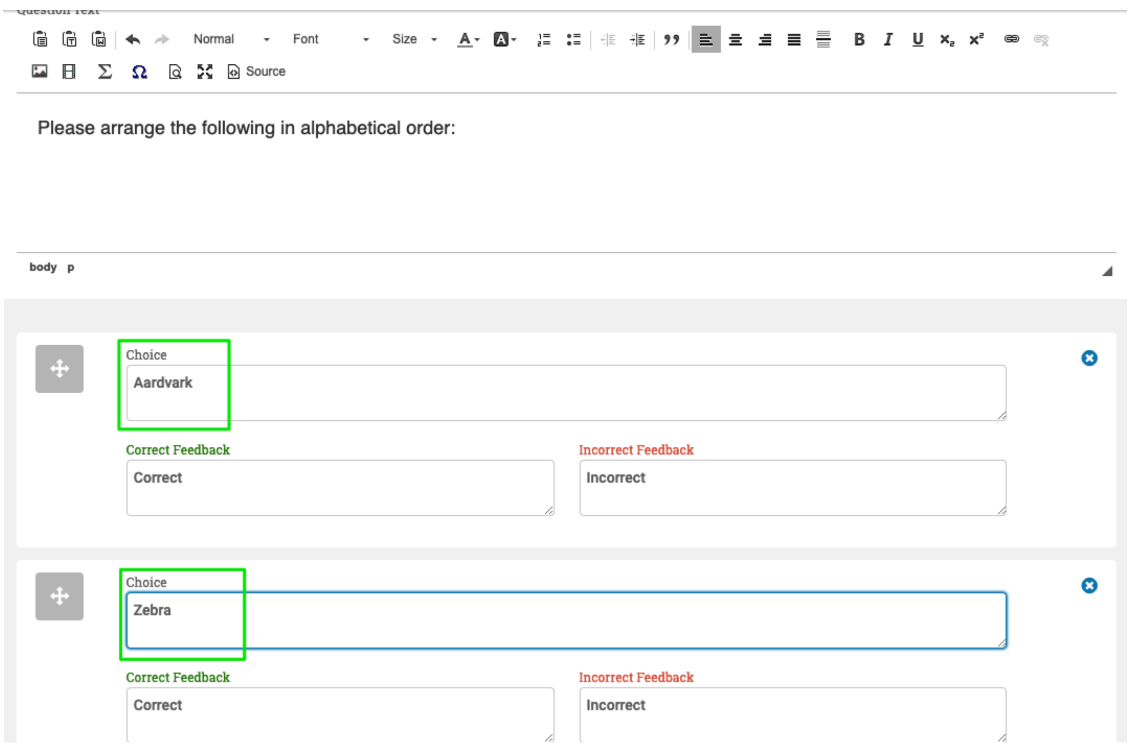
2. **Pick One:** The learner is asked to select one correct answer from a list (of as many answers as you like).



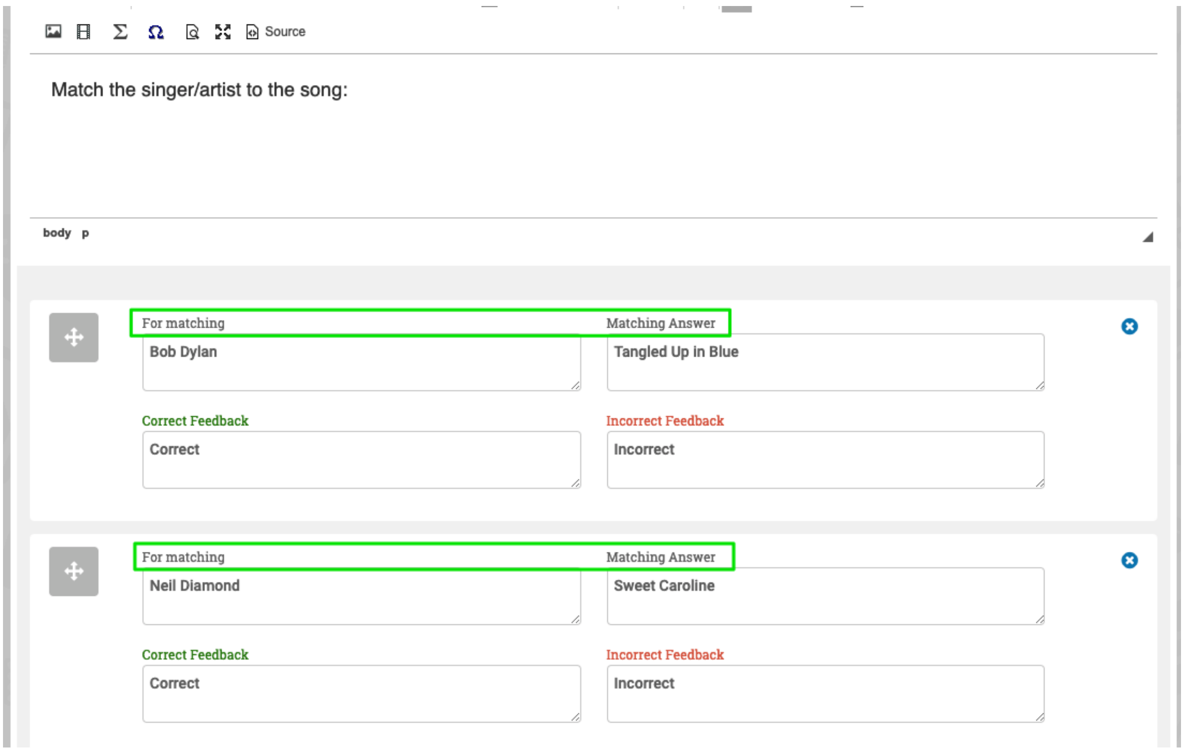
3. **Multiple Correct Answer:** The learner must select multiple correct answers from a list. Be sure to indicate in your question that there are multiple correct answers as they won't know otherwise.



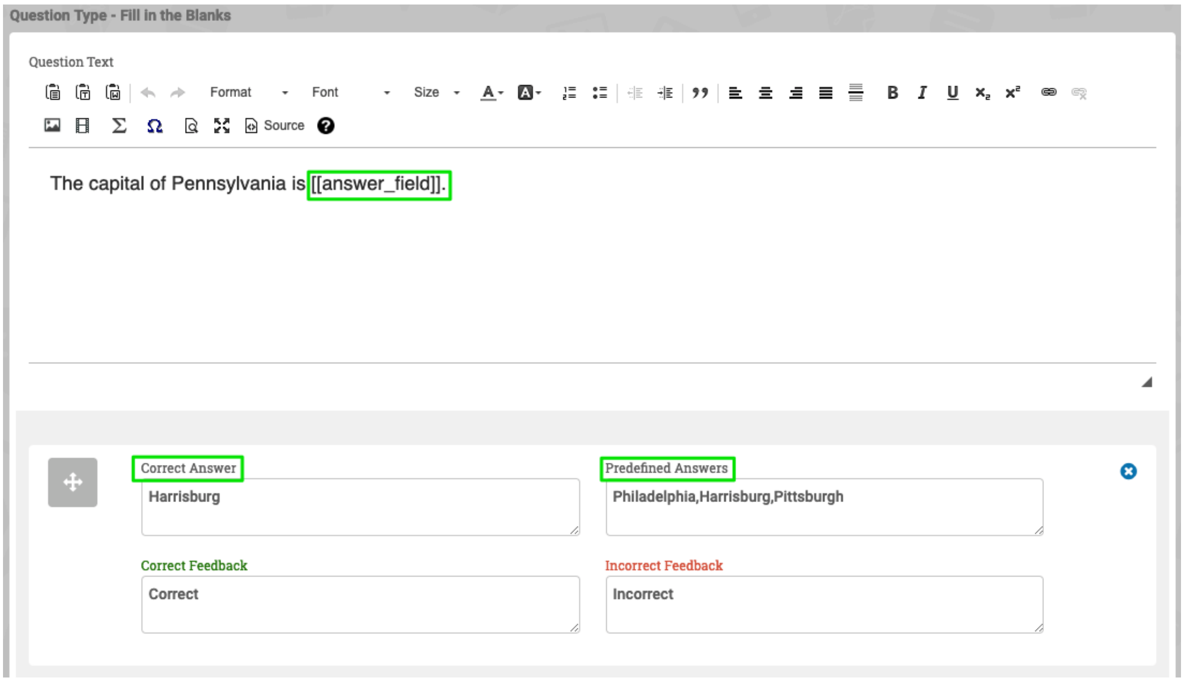
4. **Order List:** The learner is asked to put a number of answers in a particular order.



5. **Match List:** The learner is asked to pair appropriate items from two separate lists.

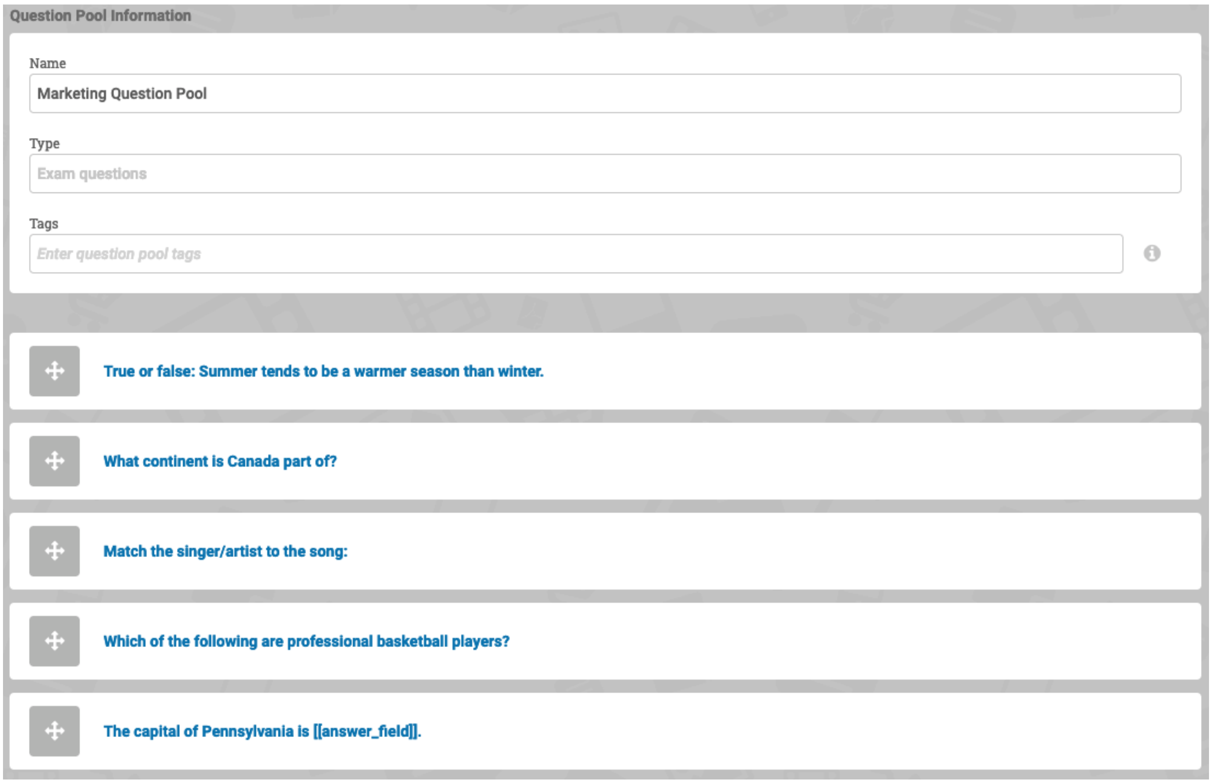


6. **Fill in the Blank(s):** The learner is asked to fill in the blank(s) by choosing a correct answer from a predefined list



Note: *When creating "Fill in the Blank(s)" questions, use the "?" icon in the editor to insert "[[answer field]]" placeholders. Then type in the correct answer and a set of predefined options, separated by a comma, from which the learner can choose.*

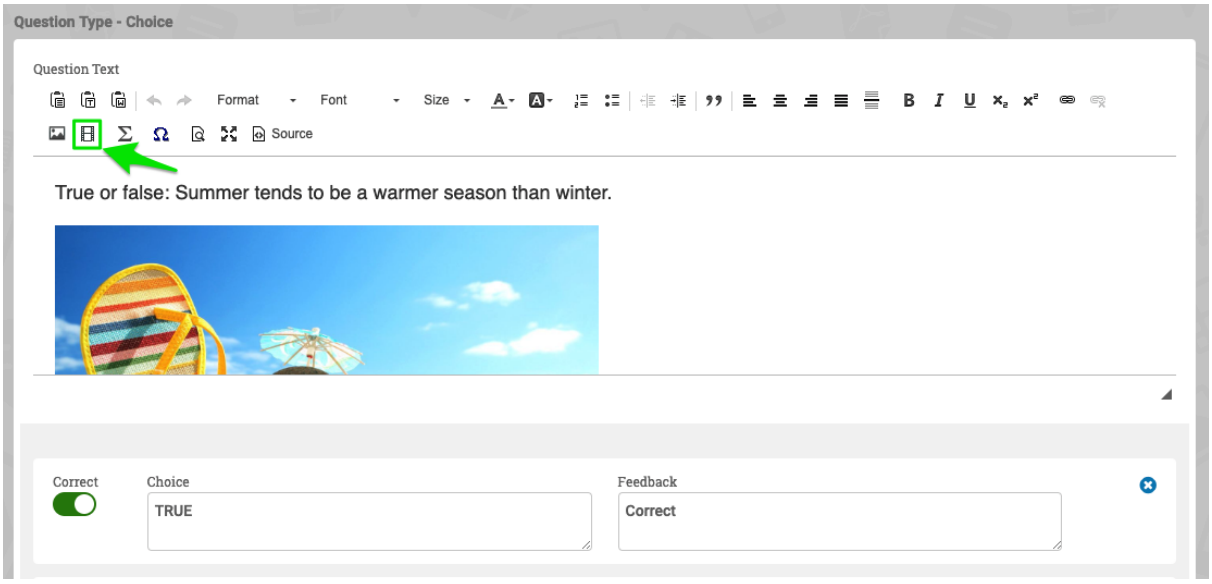
You can add an unlimited number of questions (and variety from the six question types) to a question pool. In the example below, we added six questions to our question pool and clicked **Save**. The question pool is now ready to be added to your exam.



Tip: *All of LearnUpon's question types support image and video based questions. You can upload an image or video from your hard drive or embed media from YouTube & Vimeo.*

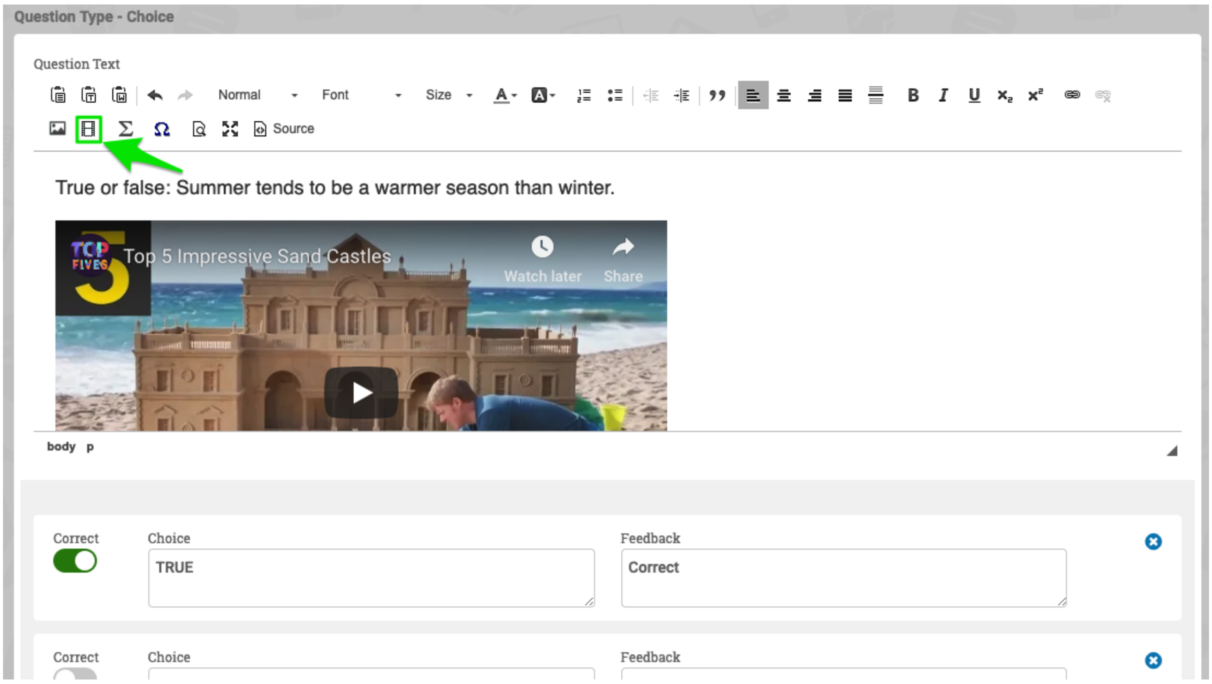
Uploading an Image into a Question

Uploading an image into a question in LearnUpon is very straightforward. When creating a question, within the text editor box, simply click on the insert image icon and you will be asked to select, upload, and resize your image.



Embedding Media into a Question

This is a similar process to uploading an image, however this time we are going to embed a video for a video based question. Simply copy the embed code for a video you wish to embed (i.e. YouTube or Vimeo). Click on the embed media icon in the editor and your video will be embedded.



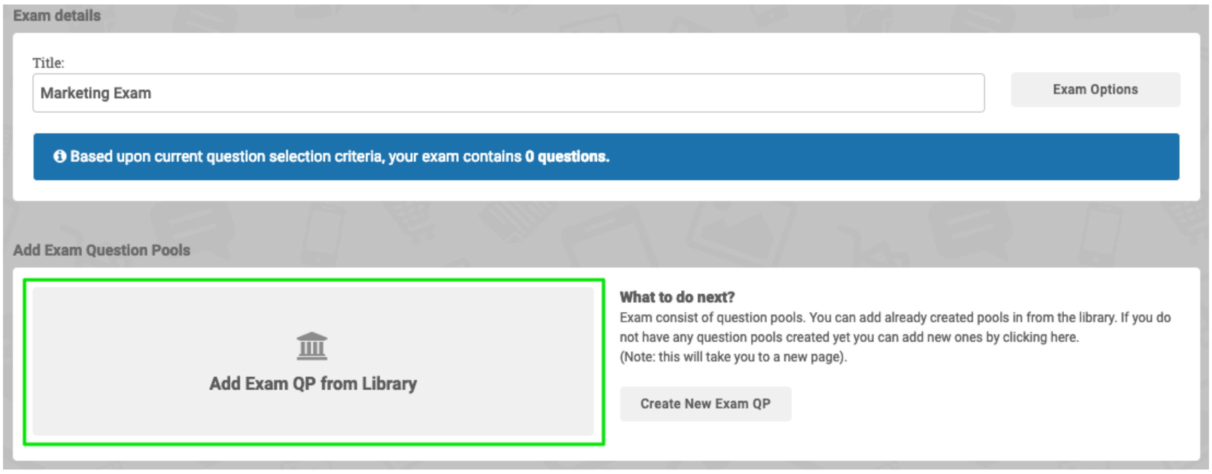
***Tip**: LearnUpon also has an advanced question editing setting that be turned on if you wish to add images and complex characters to your answers as well.*

Adding Question Pools to an Exam

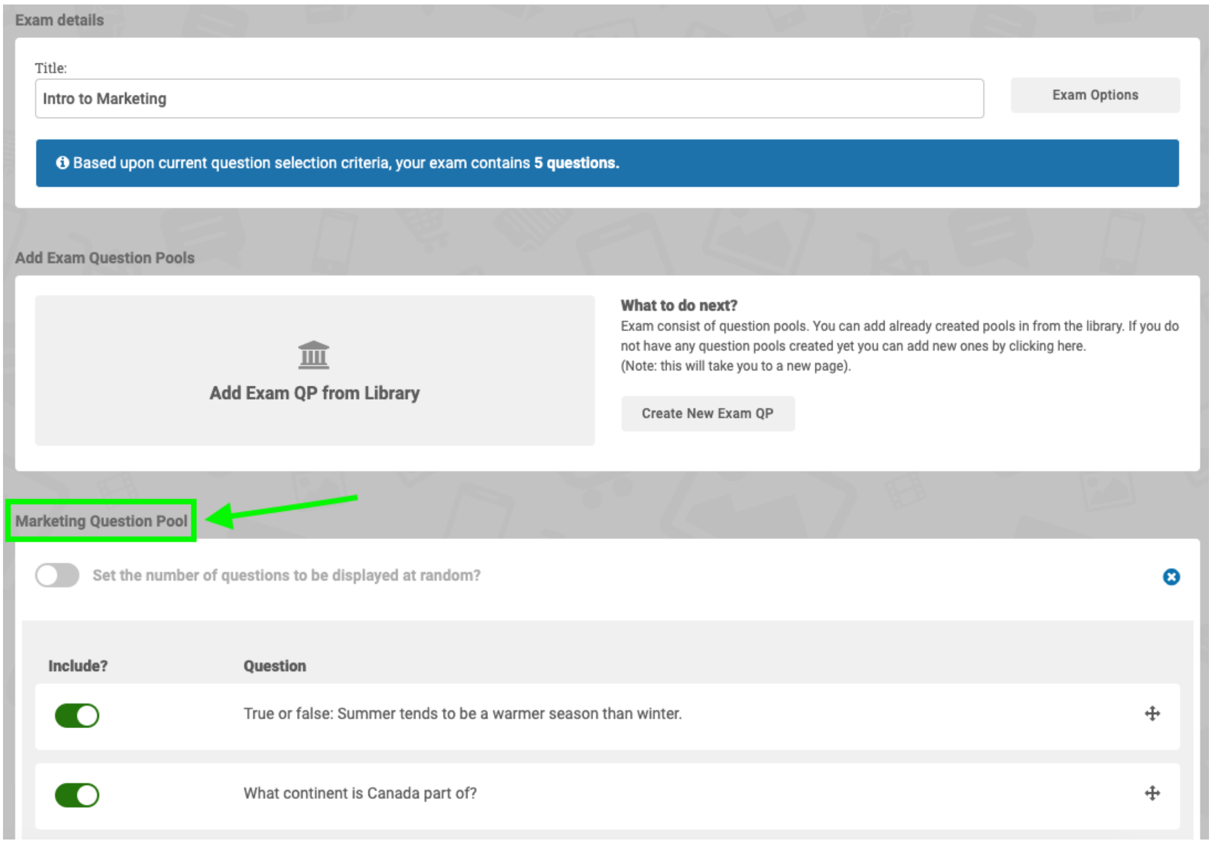
Now that you have created a question pool, you can import it into your Exam:

1. Select **Courses > Course Name > Content**

2. Click the **Add Exam QP from Library** button
3. Search for and select your question pool or pools
4. Click **Save**



5. You can now see that the question pool has been added to your Exam .



- From here, you can take a number of further actions:
- Click **Add Question Pool** again (to add another question pool)

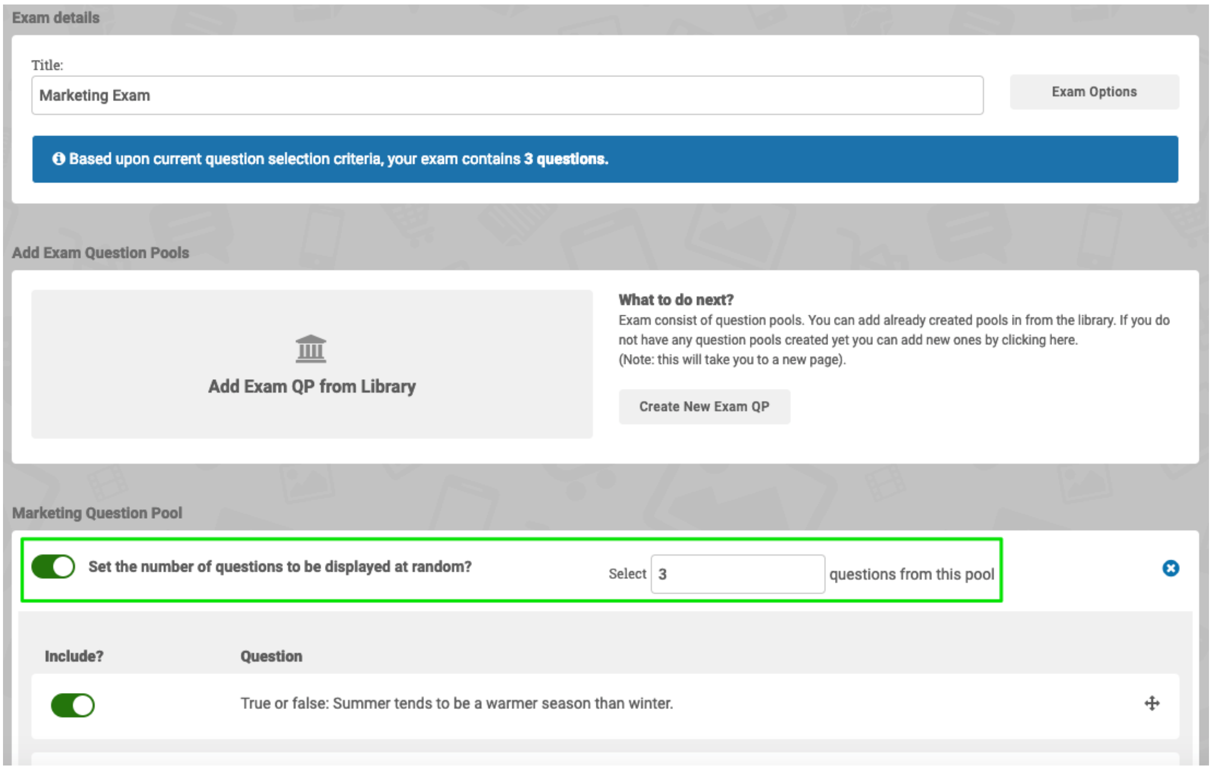
***Note**: You must include at least one question pool for the exam to function. However, you can add as many question pools as you like.*

- Toggle grey any questions to be excluded, green to be included

Tip*: After adding a question pool to your exam, you can decide which questions in the pool you would like to include and exclude. All are included by default, but if there are certain questions you wish to exclude, you can uncheck them which will remove them from the exam.*

- Switch on the **Set the number of questions to be displayed at random?** option.

Tip*: This can be a very useful function if you wish to randomize your questions. For example, if you had two question pools (subjects A and B) each containing 20 questions. You can select this option for each question pool, you will be asked to choose how many questions should be chosen, at random, from each pool. If you choose 5 from A and 5 from B, your exam would consist of 10 questions, randomly selected each time, but always a 50/50 split between subjects.*

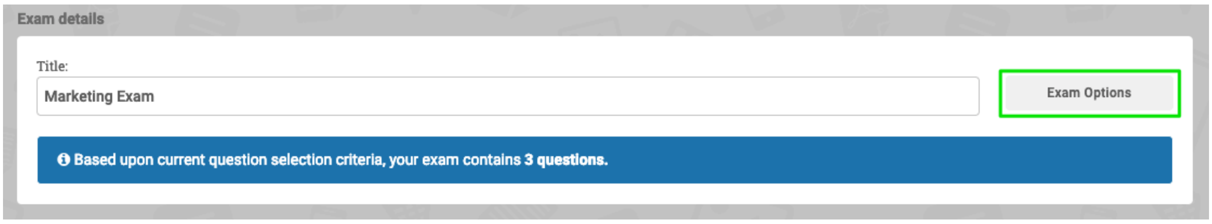


Note: *You can adjust this setting for every question pool you add to your exam. For example, you might want to randomly select 5 out of 10 from question pool A, 7 out of 12 from question pool B and 8 out of 15 from question pool C giving you a total of 20 questions in your exam.*

- Click **Exam Options** to customize your exam (further detail below)

Exam Options

Once you have added your Question Pool(s) to your exam, you can set a wide range of exam options. Click on the **Exam Options** button .



The following exam settings will appear:

- Question Randomization
  - You can check to have the order of the exam questions and/or answers randomized
- Prevent previously answered question access
  - By enabling this option, you will prevent learners from returning to their previously answered question during the exam
- Timed Exams
  - Check this option to set a time limit for the exam.
  - In the first box, enter the number of minutes your learners should have to complete the exam.
  - In the second box, enter the number of minutes, prior to the end of the exam, at which point a warning message will appear for your learners.
  - The exam will be auto-submitted on behalf of the student when the countdown clock hits zero
- Knowledge Check
  - Knowledge check exams are not considered when determining if a user has passed or failed a course. In other words, the learner's score will not affect their course status, either completed, passed or failed.
- Pass Mark
  - You can set the pass mark as either getting a certain number of questions correct (e.g. 8 out of 10) or as a percentage pass mark that LearnUpon will automatically work out based on the number of questions in the exam and the number the learner answered correctly (e.g. 75%)
  - You can choose to show the passing percentage/mark to the learner before starting the exam and/or after the exam has been submitted.
- Attempt Options
  - Set the maximum number of attempts a learner has to pass an exam before they get locked out
  - If the number of attempts is greater than 1, additional options will be enabled. These include whether a learner is allowed re-attempt an exam if already passed (in an effort to get a higher score), and what happens a lower score is received on a second attempt.
- Submit Options
  - Show the learner whether they passed or failed, show the correct answers, show them the answer feedback, etc.

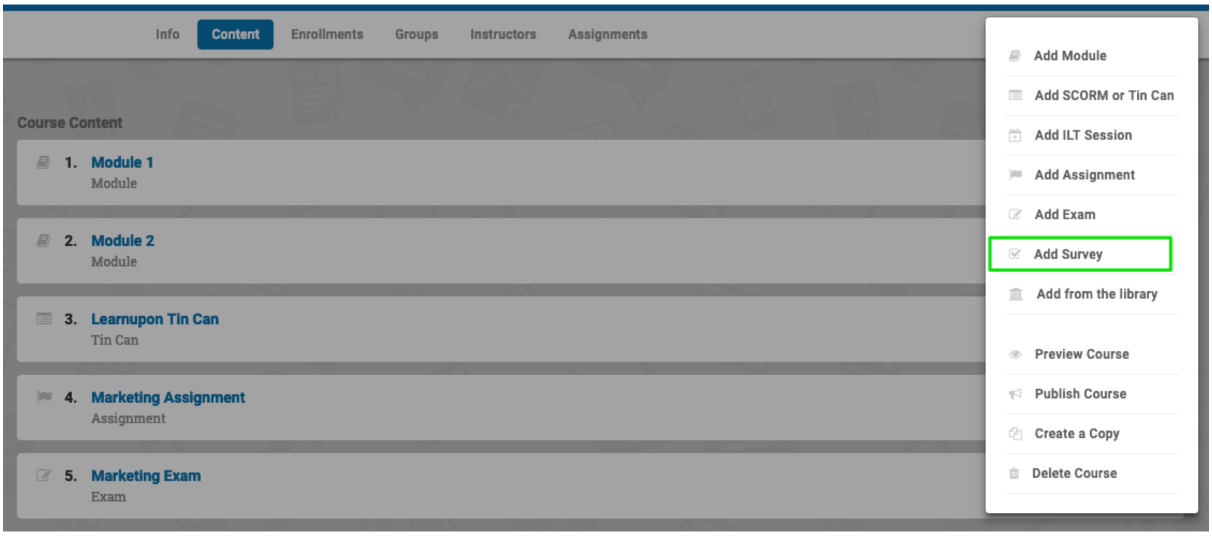
- Feedback Options
    - Choose whether to show correct answers and/or feedback when learners are allowed multiple attempts to pass the exam.

***Tip**: Be careful about showing the correct answer options or answer feedback to learners on exams which have more than one attempt. The smart ones will just write down the correct answers and make sure they get 100% on their next attempt!*

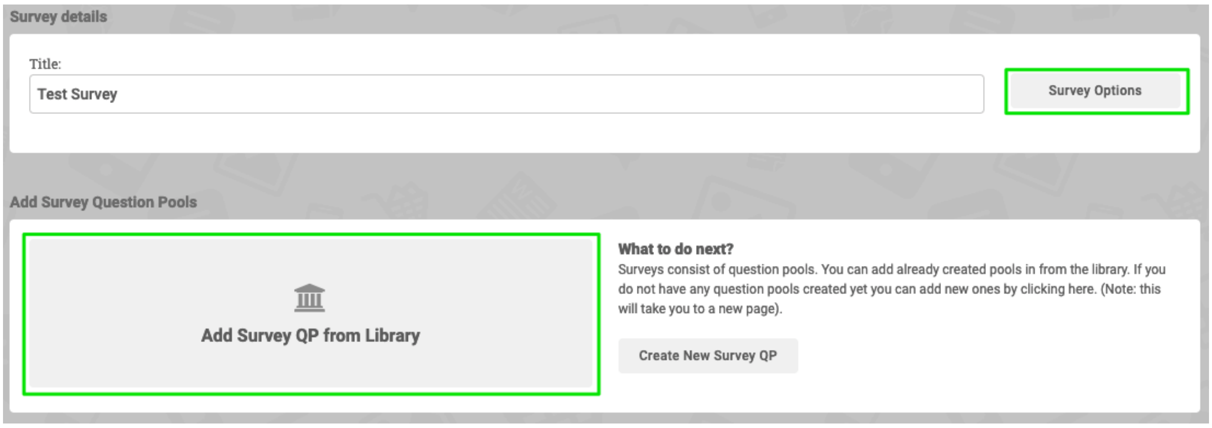
3.2.7 Add Survey

Another useful feature you can add to your courses in LearnUpon is surveys. A pre and/or post-course survey can be quite useful for gathering feedback from your learners. To add a survey to your course:

1. Select **Courses > Course Name > Content**
2. Click the **Action** button and select **Add Survey** (or click the **Add Survey** card at the bottom of the page)
3. Name your Survey and click **Save**



Much like the exam creation process, you can import previously-created survey questions (by clicking **Add Survey QP from library**) or create a new question pool by clicking **Create New Survey QP**. Once you have imported your survey questions, click **Survey Options** to customize your survey.

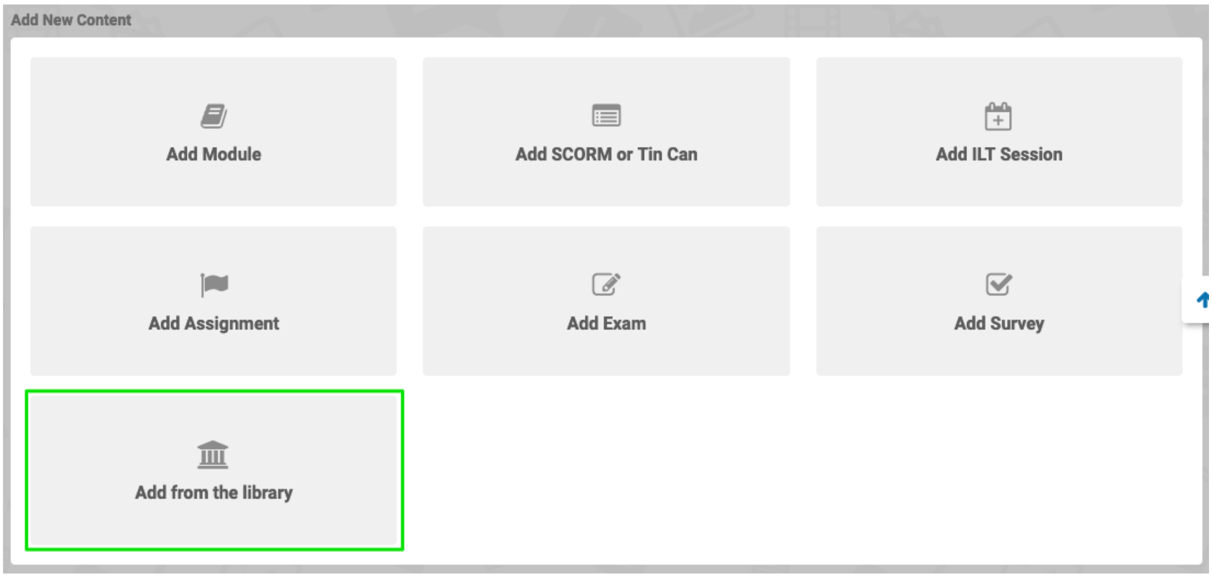


Note: *If you decide to create a new set of survey questions, when creating the question pool, be sure to select "Survey Questions" for question type. This is important as surveys consist of different types of questions to exams, e.g. rating questions, feedback questions, etc.*

3.2.8 Add from the Library

The final option for adding content to your course is to **Add from the Library**. To do this:

1. Select **Courses** from the primary navigation menu
2. Click into the course you wish to edit
3. Select **Content** from the secondary navigation menu
4. Click the **Add from the Library** card or click the **Action** button and select **Add from the Library**
5. Search and select the relevant module(s) and click **Add**



The selected module(s) will now appear in your course.

Tip*: For detailed information on the LearnUpon library, please see* ***Section 5****.*

3.3 Other Course Options

3.3.1 Course Sequencing

When you have more than one module in a course, you may wish to ensure learners can only access these modules in the order you have set. LearnUpon has a course sequencing option which, if enabled, will ensure learners complete the modules in order and can only access the next module in the course by completing/passing the previous module.
To enable course sequencing:

1. Select **Courses** from the primary navigation menu
2. Click into the course you wish to edit
3. Select **Content** from the secondary navigation menu
4. Switch the **Sequence your content** option to on
5. Click **Save**

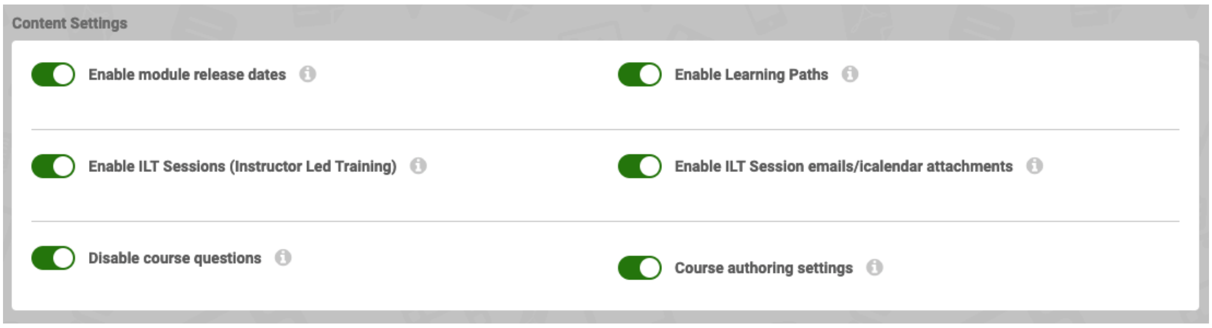
***Note**: Course sequencing can be overwritten on a learner by learner basis in cases where a learner has failed a module but you would like them to continue on the course. In order to bypass the sequencing for a learner:*

1. *Select "Users" from the primary navigation menu*
2. *Find the learner in question and click into their profile (by clicking their name)*
3. *Select "Enrollments" from the secondary navigation menu*
4. *Click the card action menu next to the relevant course*
5. *Select "Bypass the course sequencing for this learner"*

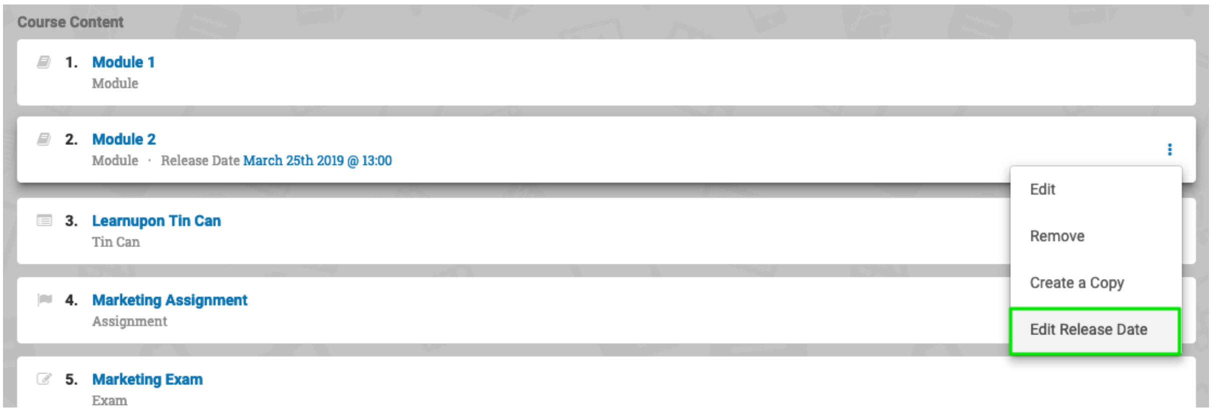
3.3.2 Module Release Dates

LearnUpon allows you to set and control release dates for modules within a course. i.e. The date/time when learners enrolled in the course can access that module. This feature allows you to effectively customize the duration of your courses.
To use this feature, you must first enable it in settings:

1. Select **Settings** from the primary navigation menu
2. Click into **Courses** and then **General Settings**
3. Under content settings, switch **Enable module release dates** slider to on



4. Now, from within your course content page, click on the card action menu next to each module.
5. Select **Edit Release Date** and add a specific date and time when your learners will be able to access the module.



***Tip**: This feature is very useful if you wish to stagger the availability of new content to your learners. As an example, you may wish to release one module per week / month to your learners to ensure a gradual onboarding of information and knowledge.*

***Note**: If the learner attempts to access the module before the release date, they will receive a message informing them of the date and time of the scheduled release.*

3.3.3 Course & Module Copying

LearnUpon allows you to copy your courses within your Portal (for reuse etc.) or across portals if using multiple portals. Copying a course will copy across both the content and library items attached.
Within a portal, you can also copy the following modules into another course in draft status:

- Exams (including settings and questions)
- Surveys (including settings and questions)
- Assignments (including any associated media)
- ILT sessions (including webinars)

- Page Modules (Text & Images, Documents, Audio, Video)

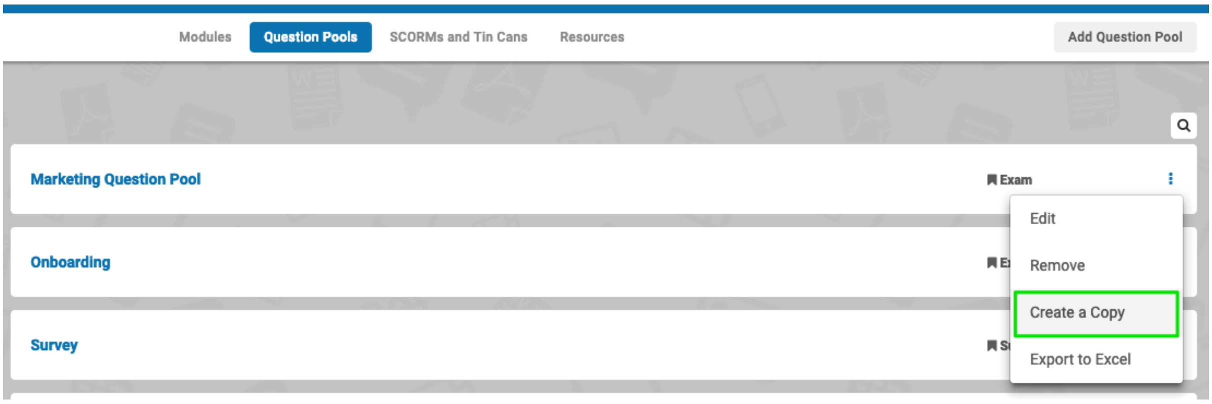
You can any of the above-mentioned modules by clicking card action menu next to the module and selecting the **Create a Copy** option :

Clicking **Create a Copy** takes you to a drop-down menu of all draft courses. Select the appropriate destination course and the module will be copied over.

Copying Questions Pools

You can also copy a question pool within your existing portal, which can be useful if you wish to amend or tweak an existing question pool. To copy a question pool:

1. Select **Library** from the primary navigation menu
2. Select **Question Pools** from the secondary navigation menu
3. Click the card action menu next to the question pool you wish to copy
4. Select **Create a Copy**

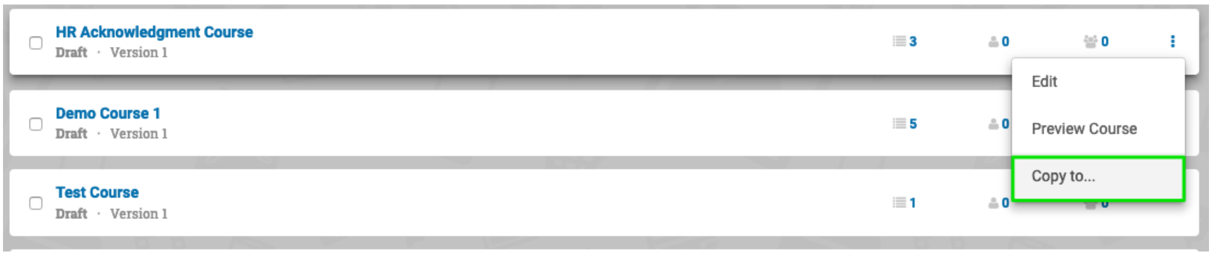


***Tip**: Once copied, your new question pool will also appear in the library but be named "Original Name - (Copy)". Click into the new question pool to rename and save it.*

Copying Courses to other Portals

If you are an administrator of more than one portal (i.e. on a multi-portal plan), you can copy courses from one portal to another. To do this:

1. Select **Courses** from the primary navigation menu
2. Click the card action menu next to the course you wish to copy and select **Copy to...**
3. You will be presented with a drop-down menu of your portals. Select the appropriate destination portal (this will default to your current portal)
4. Lastly, you will also choose if you wish the course to appear in either draft or published format.

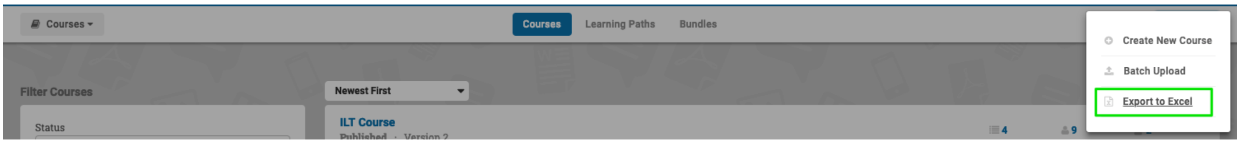


Note: *Once the copying process has begun, you will see the message "Copying in progress". You will not be able to edit the source or copied course until the copying process has completed.*

3.3.4 Exporting Course Data

A useful feature in LearnUpon is the ability to export a listing of your courses for analysis or sharing with third parties etc. This is a CSV file containing information on each of your courses (e.g. name, description, objectives, version, course owner, date created, # of modules, # of enrollments etc.).
To downloaded this file:

1. Select **Courses** from the primary navigation menu
2. Click the **Action** button and select **Export to Excel**
3. You will be asked to download and save the exported CSV file

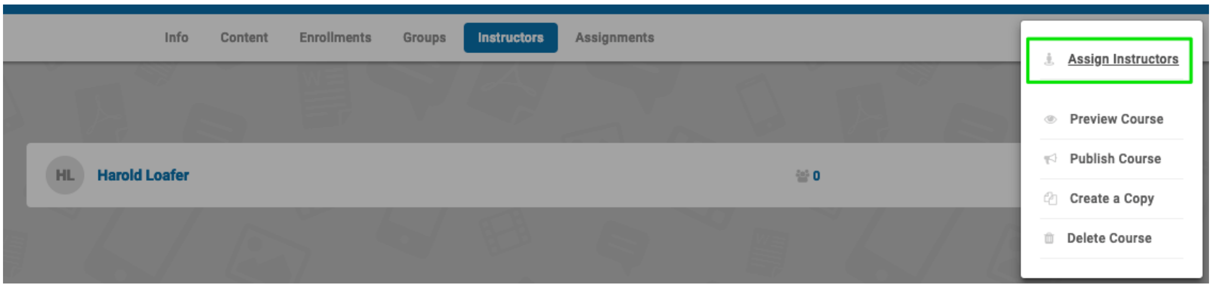


3.3.5 Assigning Instructors to a Course

A course may have one or more instructors assigned to it. Learn more about the instructor role in **Users**.

To assign one or more instructors to a course:

1. Select **Courses** from the primary navigation menu
2. Click into the appropriate course you wish to edit
3. Select **instructors** from the secondary navigation menu
4. Click the actions button and select **Assign instructors**
5. A pop-up box will appear with a list of all possible instructors. Select one or more instructor to assign to the course and click **Assign**.



If a course has several instructors and learner assignments that need to be graded by specific instructors, select the actions button next to an instructor's name and **add learner**.

3.4 Publishing a Course

Once you have finished creating your course and setting up exams, etc., we recommend previewing the course to ensure your content is set up to your liking.
To preview a course:

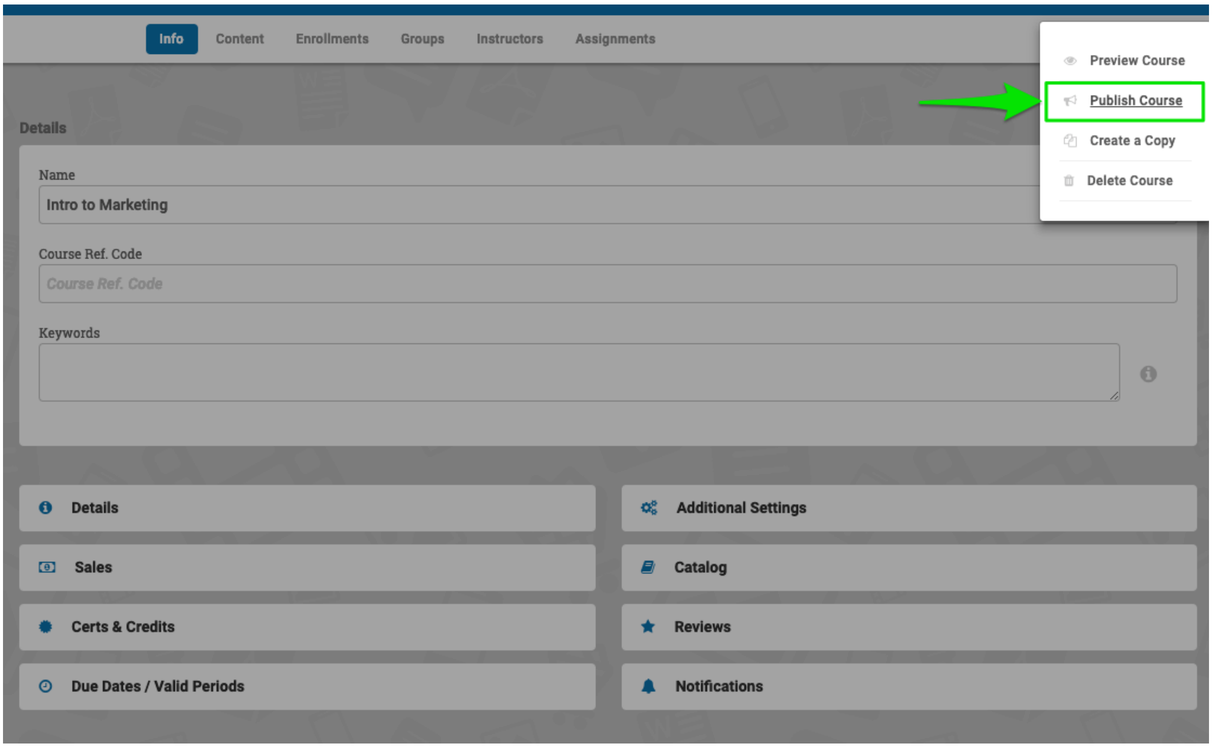
1. Select **Courses** from the primary navigation menu
2. Click into the course you wish to preview
3. Click the **Action** button
4. Select **Preview Course** from the dropdown options

You can now preview your course to replicate how your learners will experience it. If all is in order, congratulations - you are ready to publish your course!

***Note**: You can only enroll learners in published courses. Similarly, only published courses can be listed for sale in your storefront/ catalog or licensed out to client portals.*

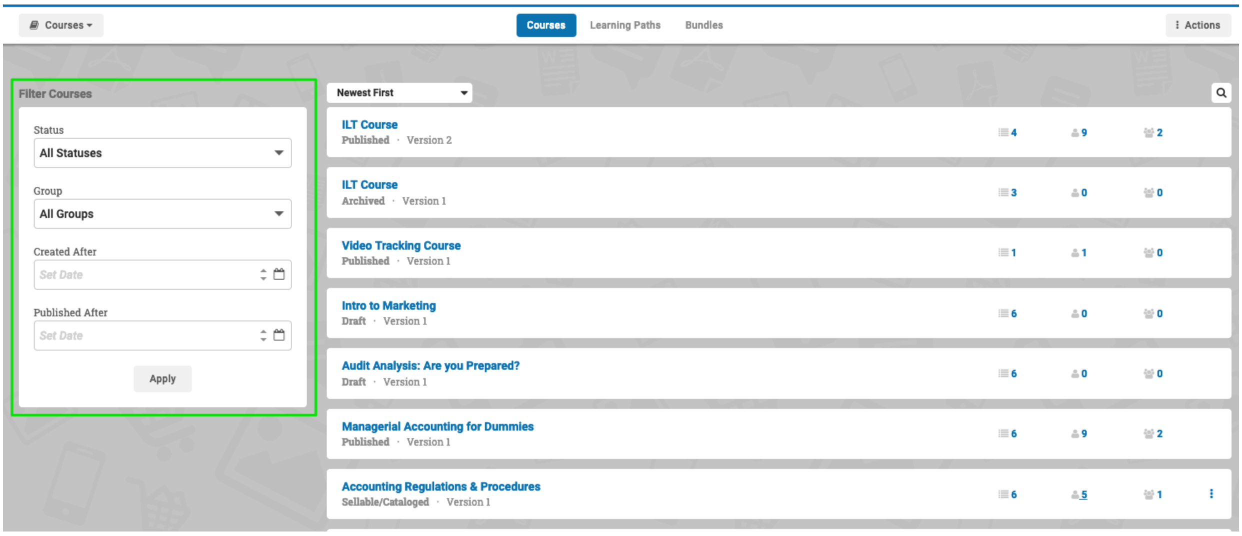
To publish a course:

1. Select **Courses** from the primary navigation menu
2. Click into the course you wish to publish
3. Click the **Action** button
4. Select **Publish Course** from the dropdown options



The status of your course will now have changed from **Draft** to **Published** (or **Sellable** or **Cataloged** if you enabled the course to be displayed in the storefront and/or catalog).

Tip: *A very useful feature when viewing courses is the ability to filter what you see using the "Filter Courses" option. You can filter by course status, learner group, creation date and published date. This makes it easy to, for example, view only courses in a draft status.*

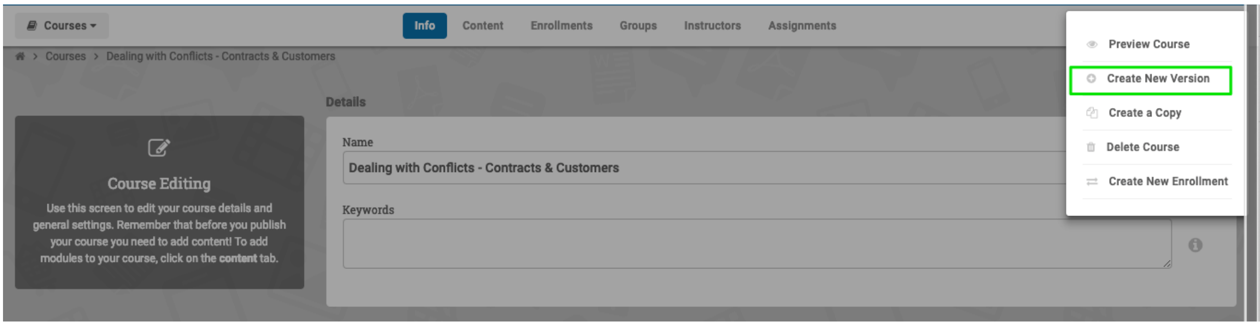


3.4.1 Course Re-versioning

If you need to make any structural changes (adding/deleting modules, reordering content, additional questions) to a course after it has been published, a re-version is required. Attempting a change that requires reversioning will prompt the system to notify you for approval so always first attempt to make your changes. Please note, segments can be added to modules without requiring a reversioning.

To re-version a course:

1. Select **Courses** from the primary navigation menu
2. Click into the published course you wish to re-version
3. On the course info page, click the action button
4. Select **Create New Version** from the dropdown options



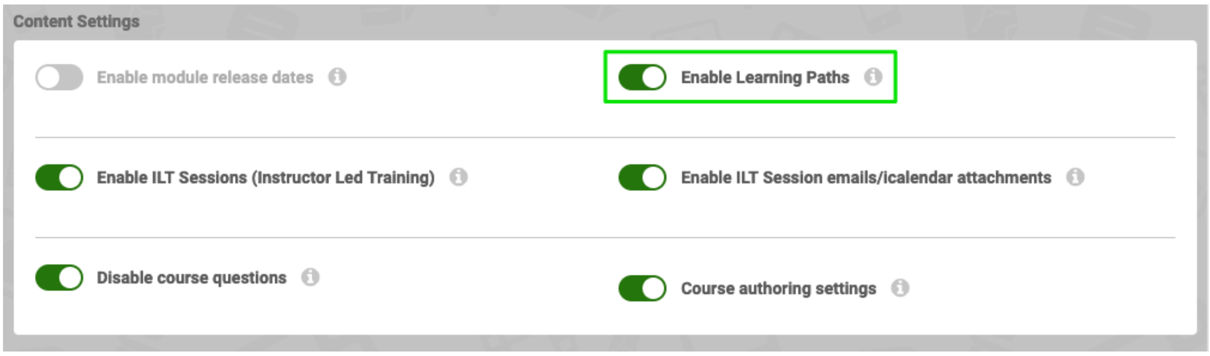
For further detailed information on re-versioning courses, please refer to the LearnUpon Knowledge Base.

End of Section - Click to return to Table of Contents

4. Learning Paths

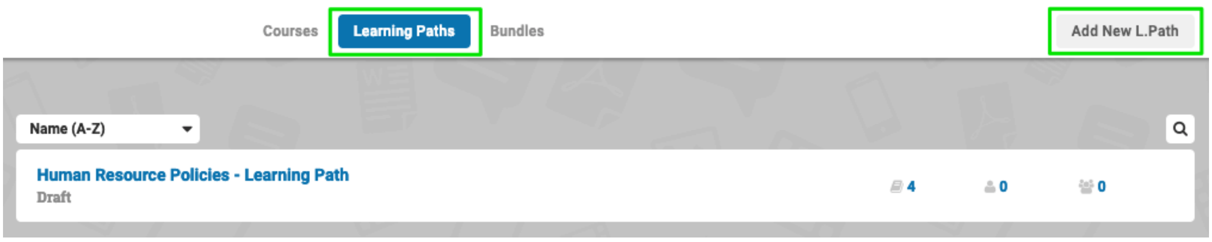
A Learning Path is a collection of courses combined together. Much like modules are the building blocks of courses, courses are the building blocks of learning paths. Learners can receive their certification on completion of the entire learning path. As not all our customers will use learning paths, they are disabled by default in your LearnUpon portal. However, if you would like to enable them, please follow these steps:

1. Select **Settings** from the primary navigation menu
2. Select **Courses** and then **General Settings**
3. Under **Content Settings**, switch the **Enable Learning Paths** slider to on



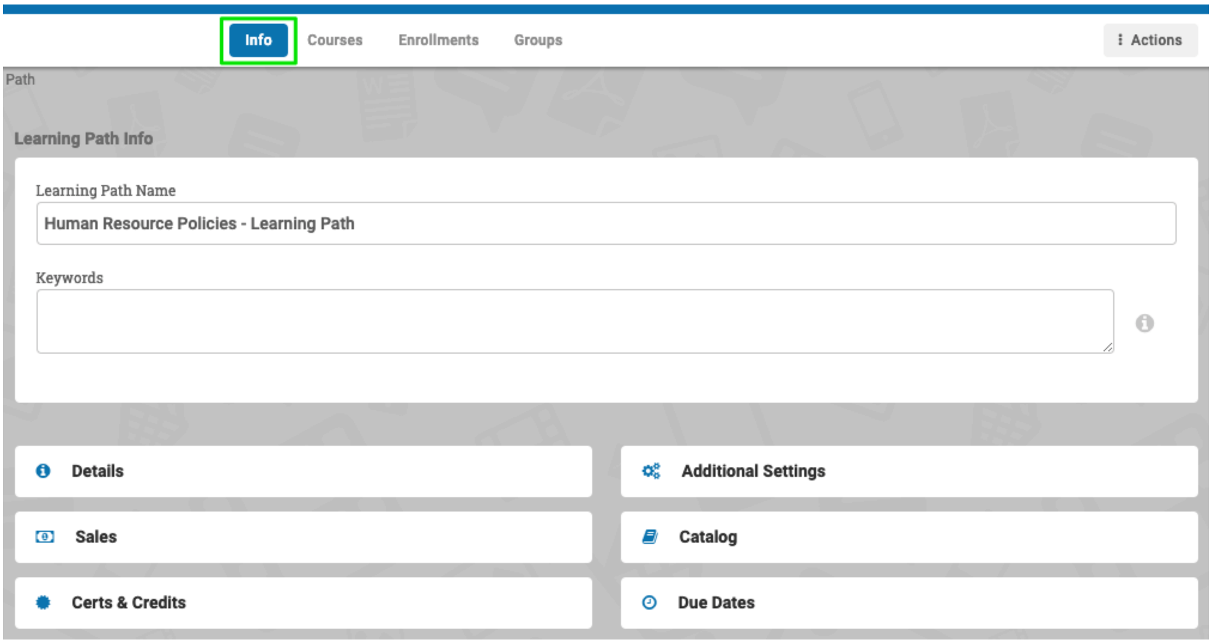
To create a new learning path:

1. Select **Courses** from the primary navigation menu
2. Select **Learning Paths** from the secondary navigation menu
3. Click the **Add New L. Path** button on the top right-hand side
4. Name your learning path and add keywords for easier searching



Info

You will be taken to the Learning Path **Info** page where you can add details, set due dates/reminders, and adjust additional settings.



Learning Path Courses

To add a course to your learning path:

1. Select **Courses** from the secondary navigation menu above
2. Click the **Add Courses to Path** button (top right-hand side)
3. Select the course you wish to include and click **Add**
4. Repeat to add further courses as required

Once your courses are added, you can choose how learners progress through the learning path. You can select from one of two options regarding what is required to complete the learning path. The learning path can be completed:

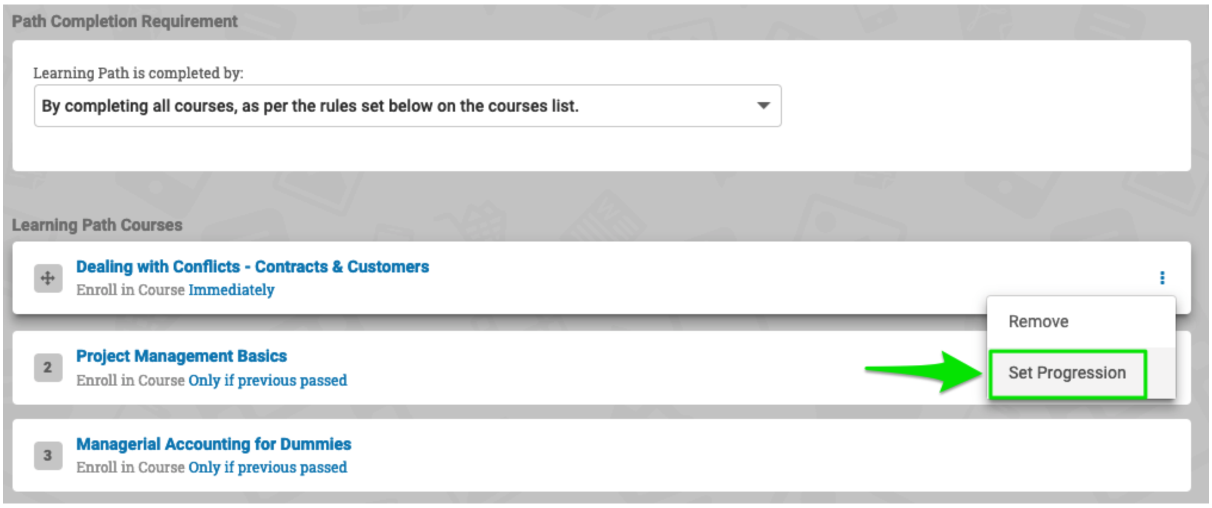
- **By completing all courses, as per the rules set below on the courses list** - the default option, which requires learners to complete all courses in a particular order to complete the learning path.

- **By completing or passing certain number of courses on the list below** - the learner only needs to complete a specified number of Courses (e.g. 10 out of 12) to complete the learning path.

***Note**: If a learner has completed the specified number of courses in a path, i.e. X out of Y courses, where X is the specified number of courses to be completed and Y is the total number of courses available on the path, they will still be able to complete the remaining courses on the path. The remaining courses will still be fully accessible on the learner's dashboard.*

Path Completion

Once added, you can re-order your courses as required by dragging and dropping. There are also several options concerning when learners will be enrolled on each course in the learning path. These options are accessed by clicking the card action menu beside each course within the learning path and clicking "Set Progression" or by clicking the highlighted progression method under the course name. .



For each course, you can select when the learner is enrolled from the following options:

- **Immediately -** this option is only available for the first course listed in the learning path (if using sequential paths). It allows a learner to launch a course as soon as they have been enrolled on the learning path.

- **On a Specific Date -** available for any course on a learning path, this option enables a learner to be enrolled on a course on a specified date.

> ***Tip***: *This option is useful if you set your learning paths to run on specific timeframes and you want courses released to learners on set dates, e.g. a 12-course program with one new course released on the first day of each month.*

- **Days after Path Enrollment -** available for any course on a learning path, this option enables a learner to be enrolled on a course a specified number of days after their initial learning path enrollment.

> ***Tip:*** *This option is very useful if you want to release a new course to the learner every X days, e.g. every 7 days or every 30 days etc.*

- **Only if Previous Passed -** this option can be applied to any course in a sequenced learning path, apart from the first course. It indicates that a learner cannot access the next course in the learning path unless they have completed and passed the previous one.

- **If Previous Passed or Failed -** as above but the learner has to complete, but not pass, the previous course to progress.

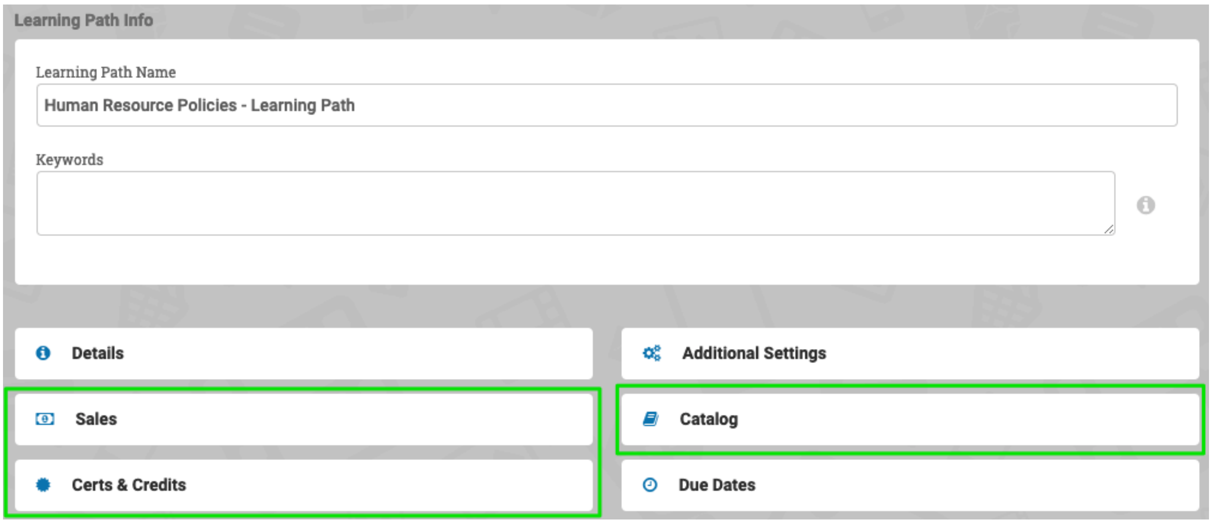
- **Delay Enrollment** - below the progression options, you will also see a box allowing you to delay enrollment for a set number of days. This option allows you to restrict the learner from enrolling in the following course until a number of days, that you set, have elapsed.

Once you are satisfied that all necessary courses have been added to your learning path and the appropriate settings are in place, you are ready to publish it. Please adjust all progression rules before publishing.

To publish a learning path:

1. Click the action button on the **Info** tab
2. Click **Publish Path**

Note: *Depending on the options enabled in your portal, you can also add learning paths to your storefront or catalog via the "Sales" and "Catalog" options on the Info tab. You can also attach a certificate and/or learning credits to a learning path (in the same way as added to a course).*



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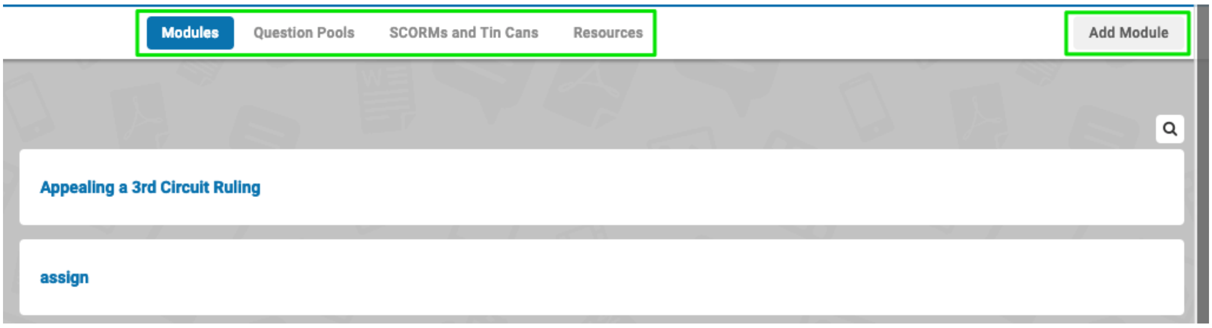
5. Library

The library in LearnUpon is where all your content is stored for reusability. Any content you create and add to a course will automatically be stored in the library. All question pools created or resources uploaded are automatically stored here, too.

You can add content directly to the library as follows:

1. Select **Library** from the primary navigation menu
2. From the secondary navigation menu, select the type of content you wish to add:
    - Modules
    - Question Pools
    - SCORMs and Tin Cans
    - Resources
3. Click the **Action** button to add your content



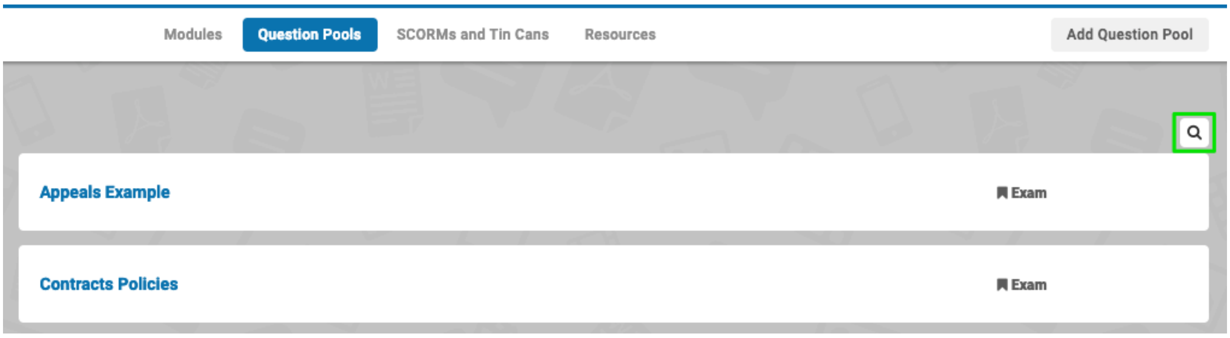
When you click on any of the secondary navigation menu options, you can view all content stored for that content type e.g. if you click **Question Pools**, you will see a list of all question pools stored within your portal. You can edit your content by either clicking into it or clicking the card action menu next to it and selecting **Edit**.

***Important**: Remember that any changes made to content in your library will automatically trickle down to courses containing that content e.g. if you change a question in a question pool, and that question pool is being used in an existing exam, the question in the exam will change too.*

You can also quickly remove or create a copy of your content by clicking the card action menu next to the content type and selecting **Remove** or **Create a Copy**. If creating a copy, you will be asked to rename the copied version and click **Save**.

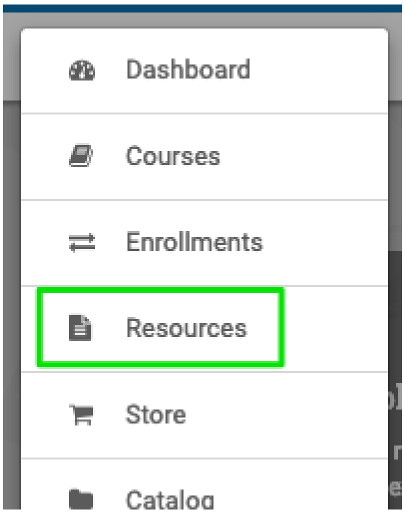
Search

A useful function to be aware of when browsing the library is the secondary search functionality. By clicking the search icon, you can enter a search term and quickly view results e.g. in this example, finding a particular question pool quickly.



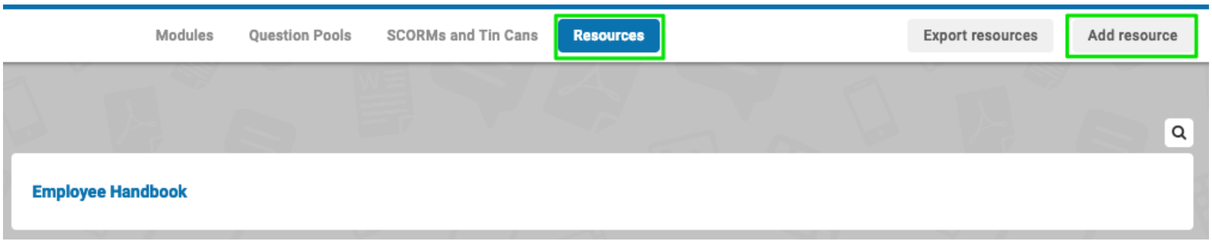
5.1 Resources

Resources can be utilized in one of two ways: as a piece of documentation added to the library that is only accessible to System Administrators and Instructors. Alternatively, resources can be non-course-specific content made available for learners to download at any time through the **Resources** option on their primary navigation menu. Access to learner-facing Resources can be restricted to specific groups.

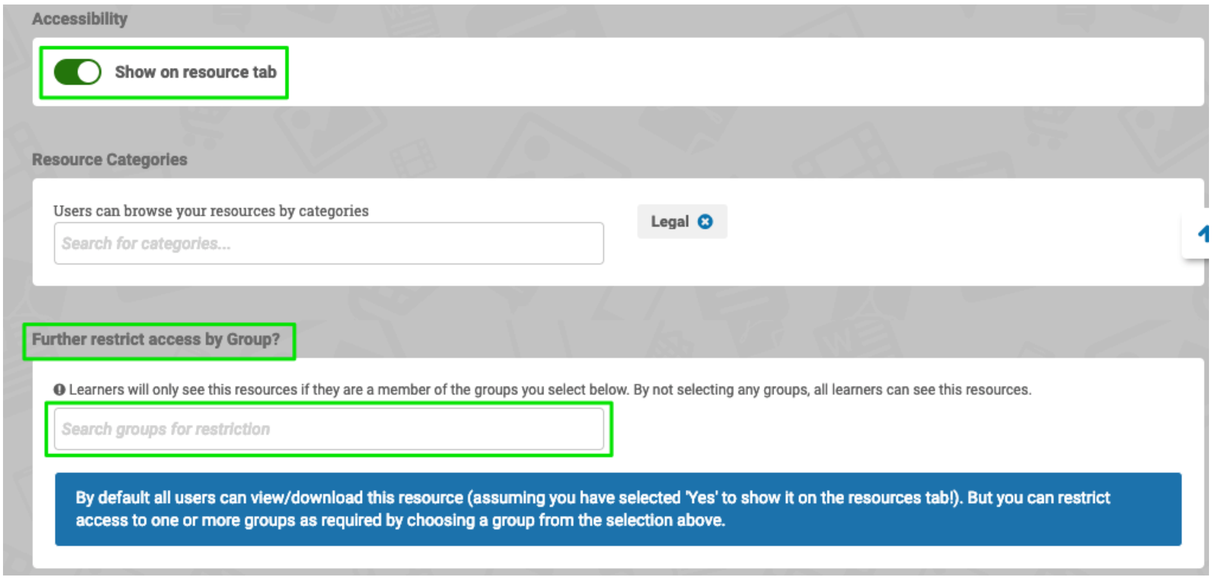


To upload a resource:

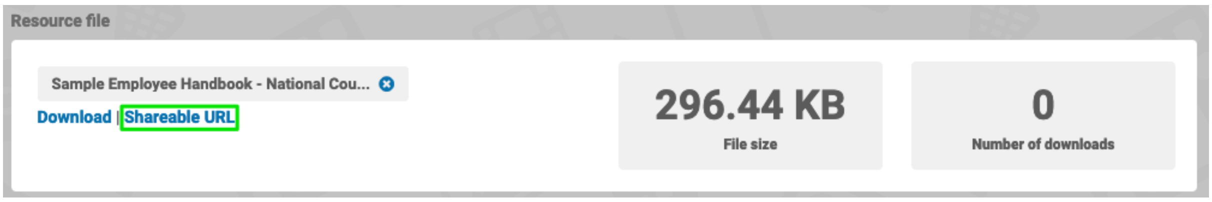
1. Select **Library** from the primary navigation menu
2. Select **Resources** from the secondary navigation menu
3. Click the **Add resource** button
4. Name the resource and click **Save**
5. Click **Upload File** to search and select the content you wish to upload



6. On this page, add a description to your resource, control accessibility, and assign a category.
7. To make the resource viewable to your learners, you must switch on the **Show on resource tab** slider.
8. You can also restrict access to the resource by group, where only members of the group or groups you select can see the resource.



Tip: On this page, you can track the file size and the number of times the resource has been downloaded. You can also link to the resource by clicking the **Shareable URL** option. This link can be shared with anyone - portal user or not. Please note, only learner downloads from the Resources page are tracked.



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6. Groups

One of the most useful and powerful features within LearnUpon is group functionality. A group is a collection of individual users. groups can be very helpful to:

- Manage how courses are assigned to different learners
- Restrict access to content
- Delegate responsibility and permissions to managers
- Filter reports
- Automate enrollments

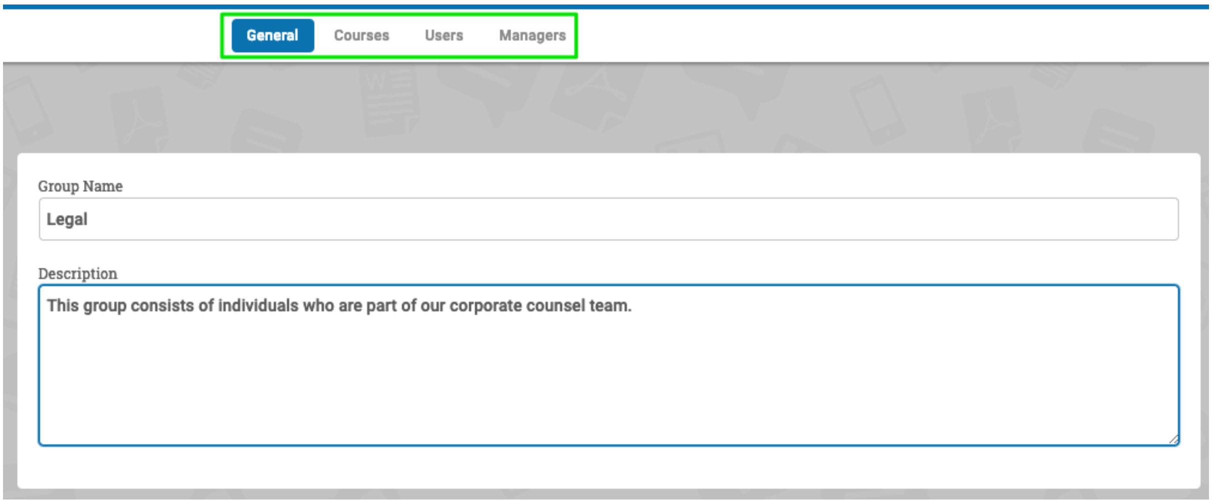
***Tip**: Many of our customers that use groups find them key to achieving smooth workflows and efficient objectives. We always encourage new customers to experiment with groups to better understand their usefulness and importance.*

6.1 Creating a Group

You can create an unlimited number of groups in LearnUpon. To create a new group:

1. Select **Groups** from the primary navigation menu
2. Click the **Add Group** button (top right hand side)
3. Enter a group name (mandatory) and description (optional) and click **Save**

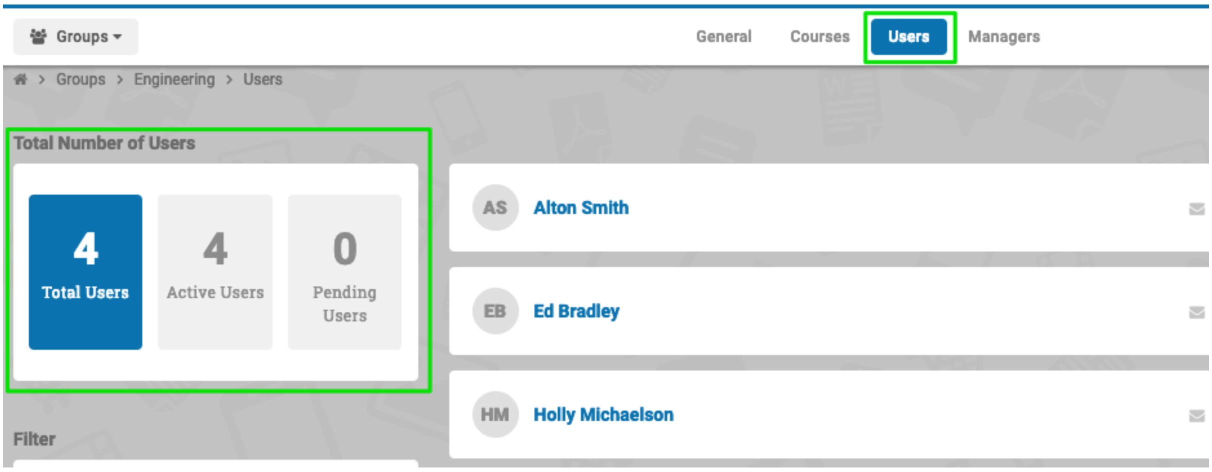
Once created, you will see a new secondary navigation menu appear.



You can use this menu to access a number of additional options. To add a User to a group:

1. Select **Users** from the secondary navigation menu
2. Click the **Add User** button (top right hand side)
3. Search and select the relevant user(s) and click **Add to Group**

You will now see the user listed as a group member. You can add an unlimited number of users to a group. If you click into one of the panels under **Total Number of Users**, you can see a breakdown of total/active/pending users.



To assign a manager to a group:

1. Select **Managers** from the secondary navigation menu
2. Click the **Add Manager to Group** button
3. Search and select the relevant manager(s) and click **Save**

***Note**: A User must first be set up as a manager in LearnUpon before you can assign them as manager of a group. Please see **Section 7.2** for more information on creating managers.*

It is important to note that a manager can manage more than one group, and a group can have more than one manager assigned to it.

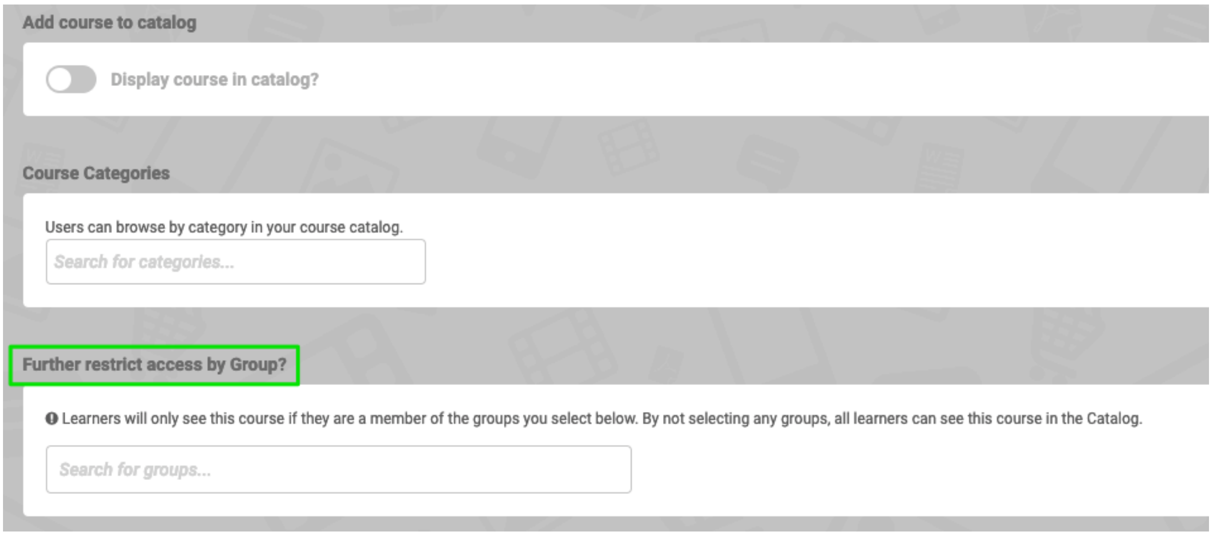
***Tip:** By clicking on "Courses" in the secondary navigation menu, you can quickly view and navigate to a list of all the course enrollments related to that particular group.*

You can also batch upload large numbers of users to a group by selecting "Groups" from the primary navigation dropdown menu and clicking the "Batch Upload" button (top right hand side). For detailed information on this process, please see **Section 7.2**.

6.2 Restricting Access by Group

Another useful feature of groups is that they can be used to restrict access to courses when displayed in the catalog or store. The store and the catalog's group restrictions work independently of each other so different audiences can have free access vs. purchase requirements.

Under **Further restrict access by Group?**, search and select the relevant group(s) that should see this course and **Save**.



***Important**: If you enroll a group in a course and then add a new member to that group at some point in the future, the new member will automatically be enrolled in the course. This is important in helping to achieve task automation within LearnUpon.*

6.3 Auto-Assign Rules

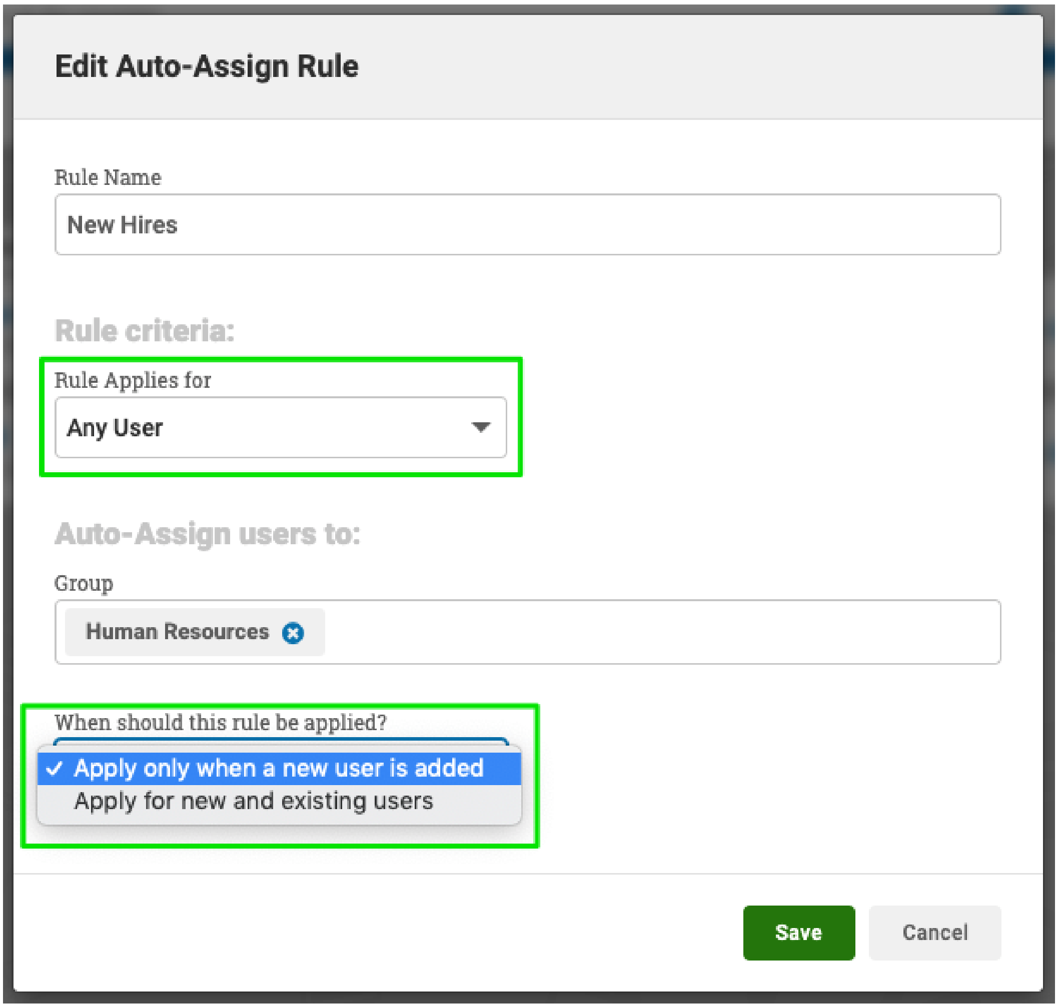
LearnUpon has a function allowing users to be automatically assigned to specific groups based on certain criteria. This is an extremely powerful tool to help streamline the enrollment process, as new users added to existing groups will automatically be enrolled in any courses the group is currently enrolled in.

The following criteria can be used with the auto-assign function:

- custom user data
- email domain
- any user
- membership type (only appears if using association settings)

The steps below outline the process for creating an auto-assign rule:

1. Navigate to **Settings > Users > Auto Assign Rules**.
2. Click the **New Rule** button.
3. Name the rule and select one of the below criteria.
    a. If selecting **Custom User Data**, select your field and then the corresponding desired value.
    b. If selecting **Email Domain**, enter your desired email domain(s).
    c. If selecting **Membership Type**, select your desired membership category.
4. Start typing the name of the group, then select from the list which group or groups you would like the users who meet the above criteria to be assigned to.
5. Select whether the rule will apply only to new users added, or to all existing users as well.
6. Click **Save**.



***Tip**: The above process is an extremely effective way of streamlining enrollment. Let's say you build out groups to reflect different departments within your company eg. sales and marketing. You can create custom user data that learners complete upon initial sign-in specifying which department they belong to. auto-assign rules can assign learners to their corresponding group based on this data, and in turn, will automatically enroll learners in any sales or marketing specific courses that each group is already enrolled in.*

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7. Users

There are four main user types in LearnUpon: Administrators, Managers, Instructors, and Learners.

7.1 User Types

1. **Administrator**: An administrator has full control over a portal and can access/edit all content and settings within it. While there is no limit on the number of administrators you can have, we recommend that you keep the number relatively small. This makes it easier to control who can create courses, enroll learners, etc. If there are many administrators, you may find it difficult to identify who did what e.g. delete a course that should not have been deleted.

2. **Instructor:** instructors can be assigned to one or more courses and have the ability to run reports on those courses, correct assignments, manage ILT sessions (if you are using this feature) and/or edit/create content (if they are granted permission to do so via their User Profile page). For courses on which they instruct, an instructor can:

   - View course details and update some course options such as the valid period, whether instructor messaging is enabled etc.
   - View course enrollments
   - Manually mark a learner as complete
   - Run the course status and exam reports

   ***Note**: For any learner to which the instructor is assigned on a course, he/she will be the default recipient of assignments uploaded by that learner and any messages sent by that learner using the "Message the Instructor" feature.*

3. **Manager:** Managers are assigned to groups (as opposed to courses) and can be granted each of the permissions listed below.

   ***Tip:** You must have at least one group created in order to see the manager role!*

   Once assigned to a group, a manager can:

   - View group members, edit their details and get an overview of how each member is progressing on their assigned courses
   - Enroll members in courses and run reports on group progress
   - View a breakdown by course of their group's progress and certificates
   - Manually mark group members as complete

4. **Learner:** This is the default user type with the least number of permissions. Learners can login, launch courses and view resources (if available), self-enroll in courses

through their catalog (if enabled), view their course history/ certificates/ learning credits, and message instructors (when enabled).

7.2 Add Users

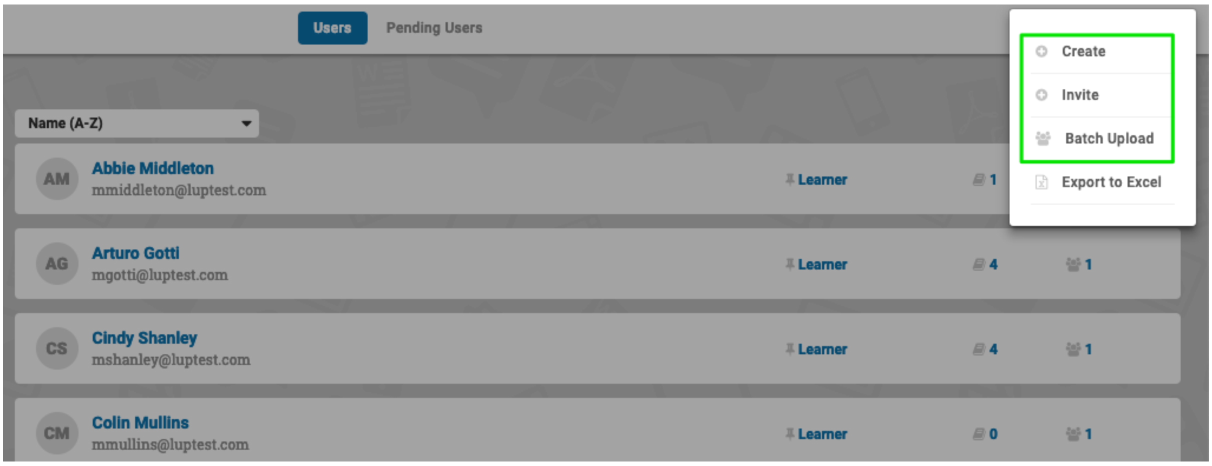
There are a number of methods to add users to your LearnUpon portal. These include:

- Create user
- Invite user
- Batch upload users
- User self-registration

Each of these options is discussed in detail below. To access the first three options:

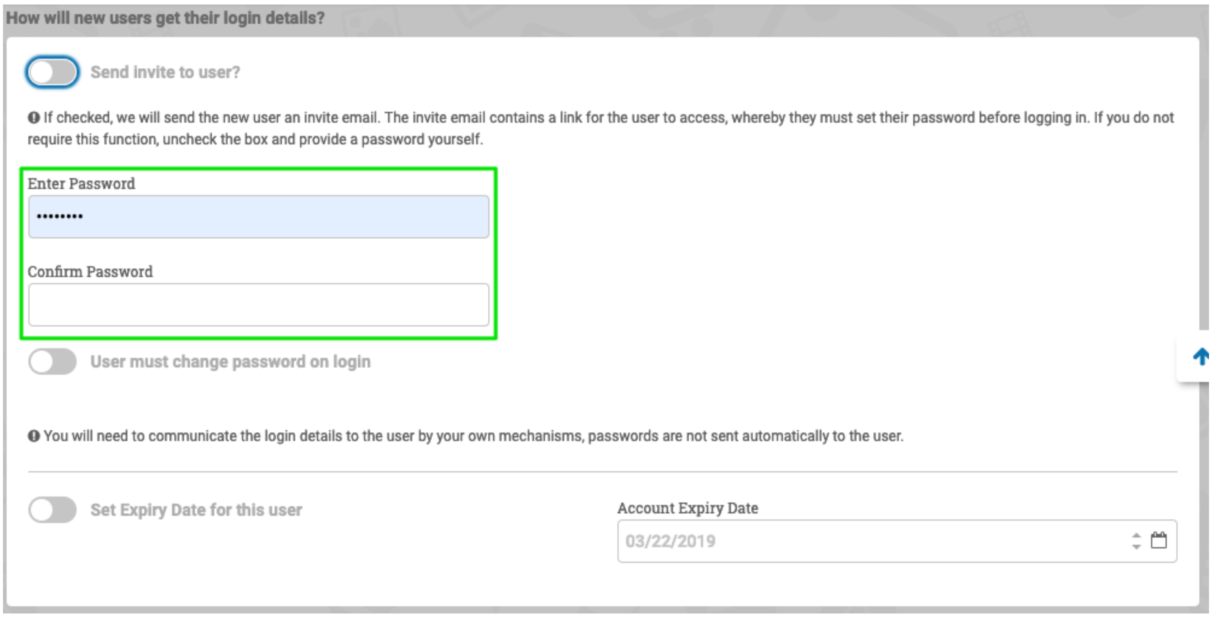
1. Select **Users** from the primary navigation menu
2. Click the **Action** button and select **Create, Invite** or **Batch Upload.**

Tip: *the quickest way to add a handful of users to LearnUpon at one time is to select "Invite User". "Batch Upload" is most efficient when adding a larger number of users at once.*



Create User(s)

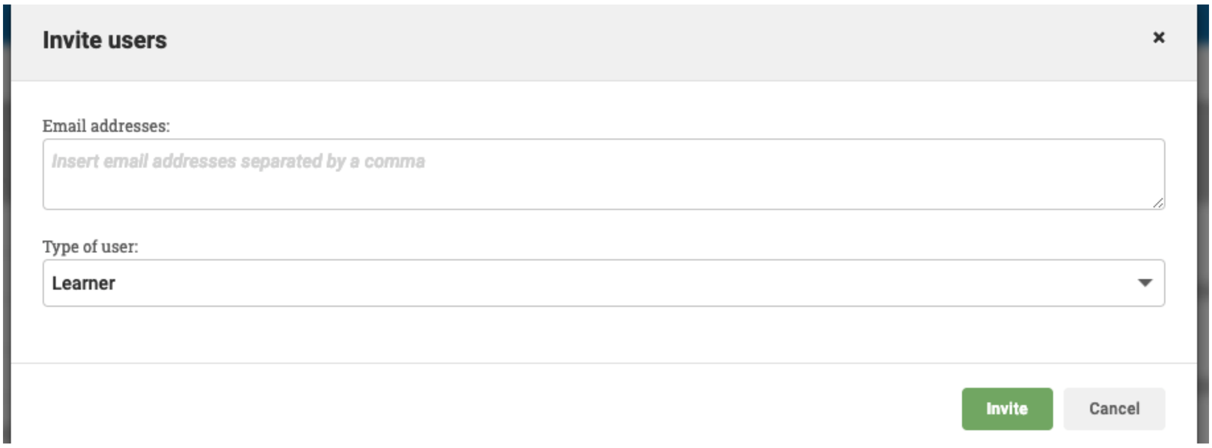
When you select this option, you manually create a new user by entering their first and last name, email address, user type, and permissions (If instructor or manager is chosen).
You must specify how you wish the new user to receive their login details. The default option is that LearnUpon will send them an invite email containing a link, which the new user clicks to set their password before logging in. Alternatively, you can create a password for the new user and provide it to them. If you do this, it is recommended that you enable the **User must change password on login** option.



If you scroll down, you can also set an optional expiry date for the user, add the user to an existing group, or enter custom user data for the user (if you have this enabled under settings).

Invite User(s)

Inviting users is a quick way to add a few users to LearnUpon at one time. When you click this option, you will be asked to enter one or more email addresses, select the user type to be created (the same user type must apply to all), and click “Invite” . The new user(s) will be sent an email with a link to confirm their account. On first login, the new user must set their password and complete their user profile.



***Note**: You can invite users as learners, instructors, managers or administrators by selecting the required user type from the drop-down menu. You can also assign users these roles at a later date, after they have accepted the invite.*

Invited users will appear as **Pending Users** until they accept their invitation and confirm their account. You can resend invitations as required through the pending users list found within the secondary navigation menu on the users page.

Batch Upload Users

If you would like to invite or create large volumes of users at once, LearnUpon allows you to do this through the batch upload feature. This is achieved by uploading a file to LearnUpon with all the relevant user data. LearnUpon provides a sample file, which you download and then populate with your data.

To batch upload users:

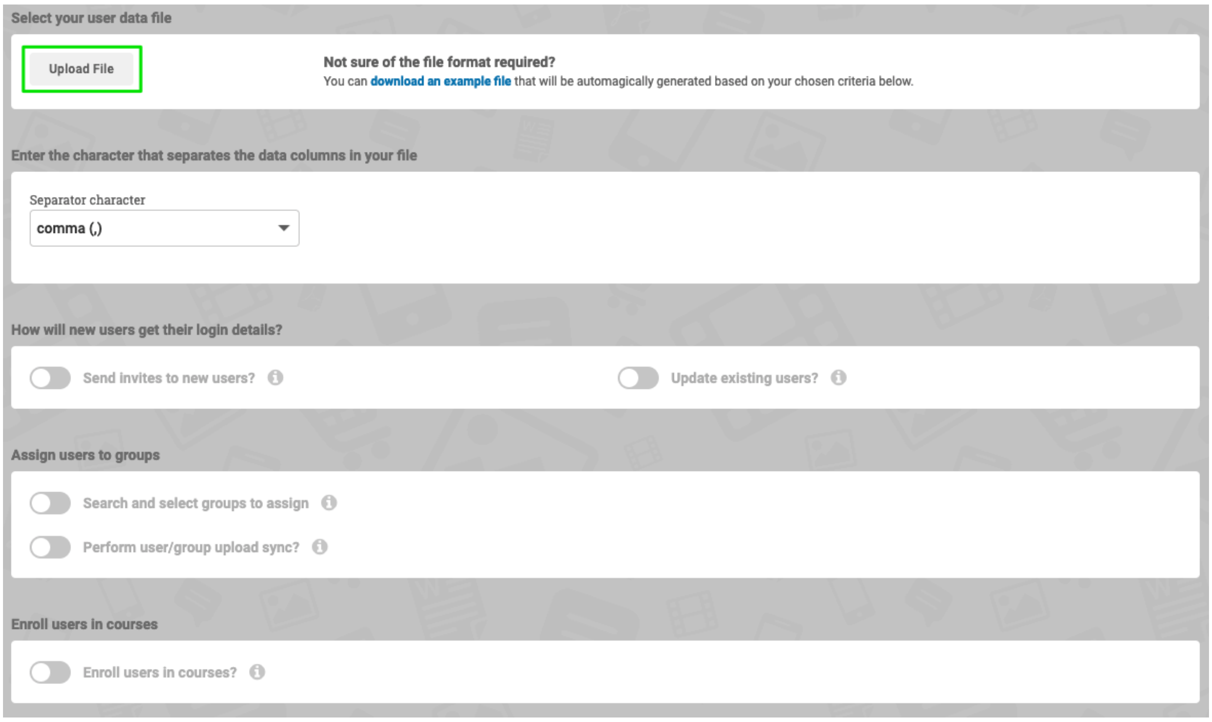
1. Select **Users** from the primary navigation menu
2. Click the **Action** button and select **Batch Upload**
3. Click **download an example file** for a template where you will import your data

> ***Important***: *This template also contains instructions for customizing your data. LearnUpon will automatically include columns for any custom user data fields you have setup in your portal.*

4. Specify your preferred options regarding sending invites to new users (the default) or instead creating new users and setting their password. You can also set options here for automatically adding new users to groups and/or enrolling them in courses.

> ***Note***: *If you are going to be batch **inviting** users rather than batch **creating** them, remember to delete the password column from your upload file.*

5. Click **Upload File** to select your user file to upload



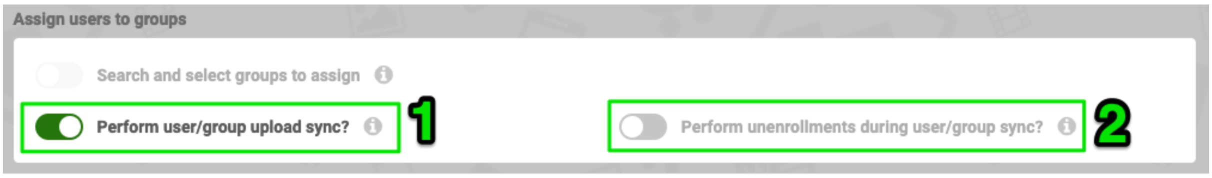
Group Sync during Batch Upload

During the batch upload process, you may wish to make quick, mass adjustments to your portal group memberships; adding and removing users from groups en masse. You can do this using **Group Sync** functionality - by adding a column entitled "group_sync" to your batch upload file.

	A	B	C	D	E	F	G	H
1	email	firstname	lastname	group_sync				
2	johndoe1	John1	Doe1	groupname1,groupname2,groupname3				
3	johndoe2	John2	Doe2	groupname1,groupname2,groupname3				
4	johndoe3	John3	Doe3	groupname1,groupname2,groupname3				
5	johndoe4	John4	Doe4					
6	johndoe5	John5	Doe5	groupname1,groupname2,groupname3				
7	johndoe6	John6	Doe6	groupname1,groupname2,groupname3				
8	johndoe7	John7	Doe7					
9	johndoe8	John8	Doe8	groupname1,groupname2,groupname3				
10	johndoe9	John9	Doe9	groupname1,groupname2,groupname3				
11	johndoe1	John10	Doe10	groupname1,groupname2,groupname3				

Group sync ensures that users are members of only the groups listed beside their name in the **group_sync** column. Importantly, if the column is left black for a particular user, that user will be removed from all their groups. Therefore, the group sync feature should be used with caution! Once you have uploaded your CSV file, you will see there are also two new configurable options on the batch upload page:

1. **Perform user/group upload sync?:** this will need to be enabled for your sync to be actioned in LearnUpon.
2. **Perform course unenrollments during user/group sync?:** if enabled, this will unenroll your user from courses they were originally enrolled in via their (soon to be removed) group memberships.

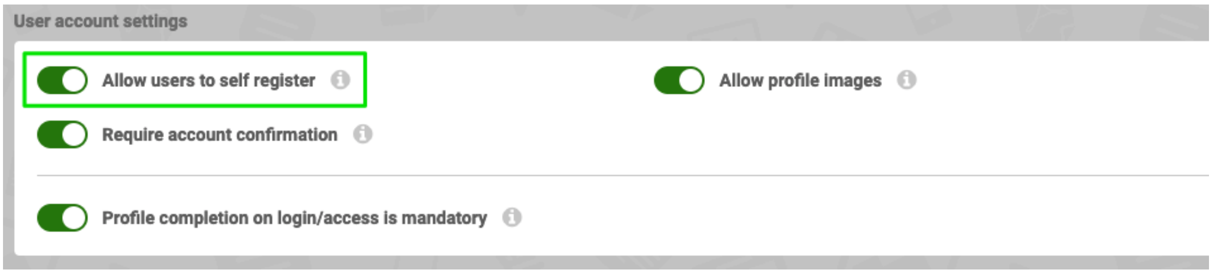


Note: *Users batch uploaded and invited with a "group_sync" column included in the CSV file will only have groups assigned by this feature (as they will not already be in groups so cannot be removed). Group sync is primarily intended as a way to update existing users in your portal, and will not work for pending/invited users i.e. these users can only be added to groups when first invited, and cannot be removed from them using this feature until the invite is accepted.*

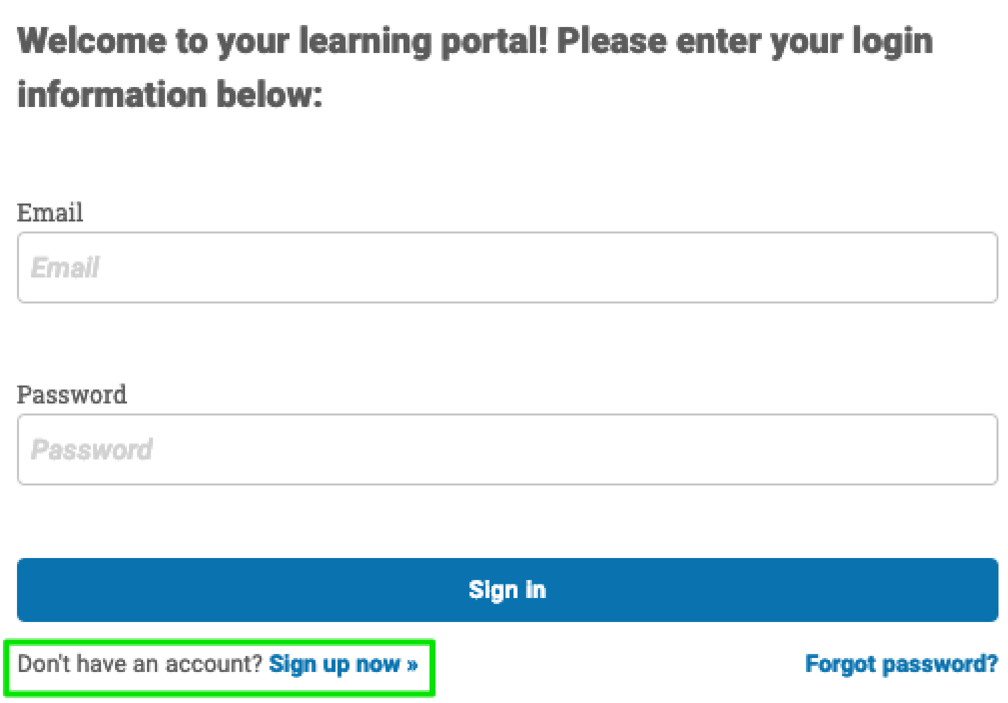
User Self-Registration

You can also allow users to self-register on your portal without the need to create or invite them. To enable this option:

1. Navigate to **Settings > Users > General Settings**
2. Switch the **Allow users to self-register** slider option on.



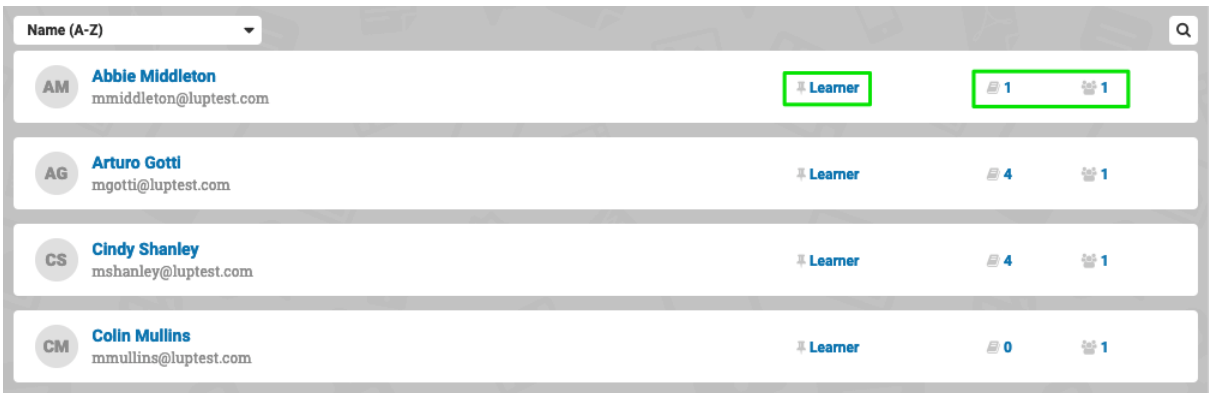
Here, you can also decide whether or not you want users who self-register to first confirm their account via an email confirmation. We recommend that you always enable this option as it helps prevent spam or bot sign-ups to your portal. You can also make profile completion on login mandatory under this setting. Once you enable self-registration, potential new users can sign-up for an account on your login screen .



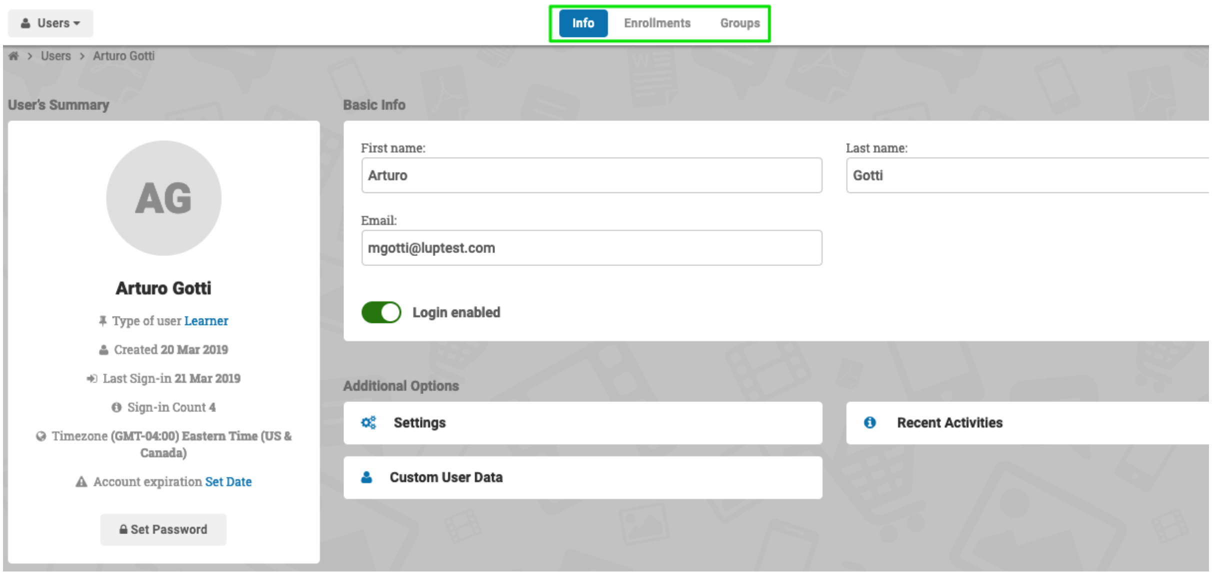
7.3 User Profiles

When you select **Users** from the primary navigation menu, you are taken to the main users page, which lists all registered users in your portal. When you click on a user's name, you are brought to that user's profile page.

***Tip**: On the main users page, there are also a number of quick links to detailed user information.*



Once you click into a user's profile, you are taken to the user profile page.

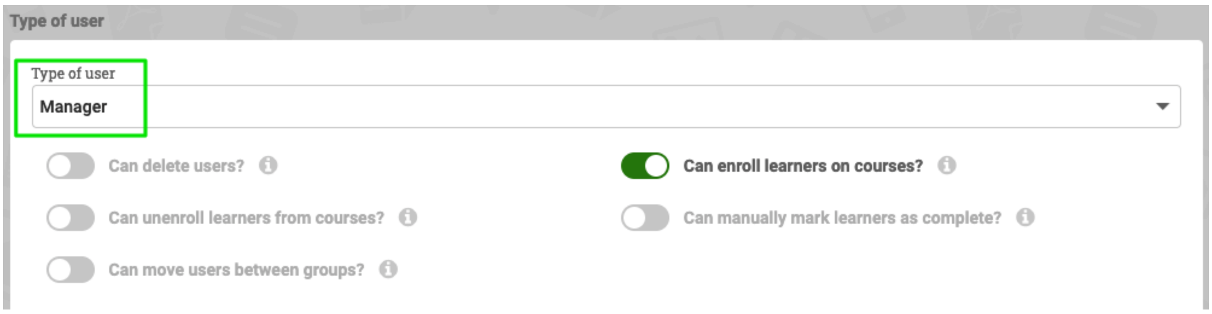


The user profile page contains three sections via the secondary navigation menu. These are "Info, Enrollments, and Groups."

Info

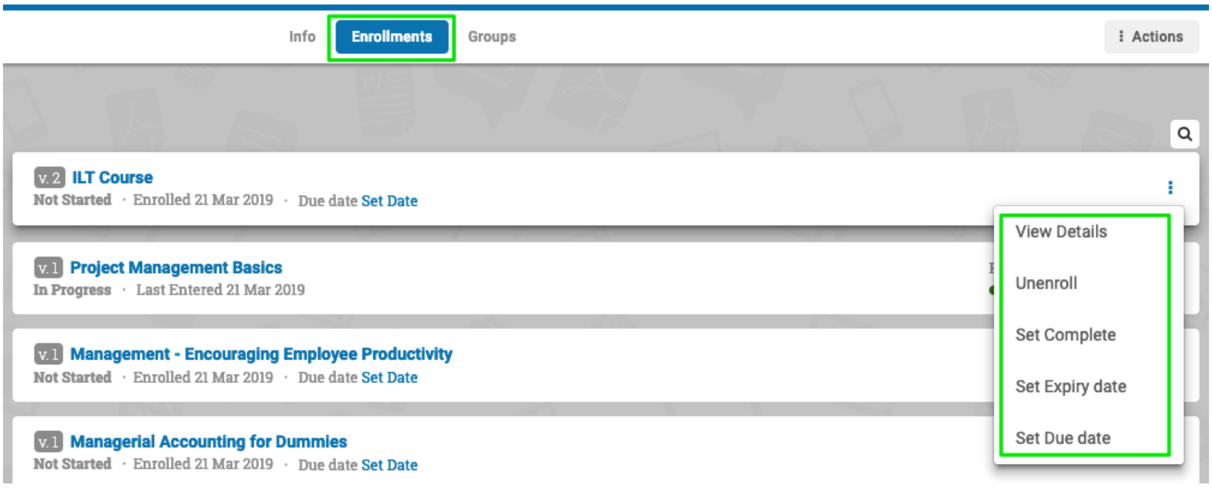
The **Info** page contains basic user info (name & email address), account details (creation date, last sign-in, number of sign-ins etc.) and links to additional options including:

- **Settings** - this is where you can set the user type and apply permissions
- **Custom User Data** - here, you can access and edit this data (if using this feature)
- **Recent Activity** - here, you can track the user's behavior within LearnUpon



Enrollments

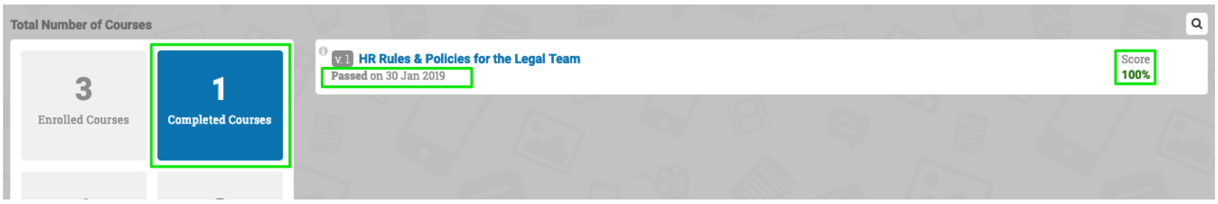
Selecting **Enrollments** from the secondary navigation menu displays a list of all courses (and learning paths) on which the user is enrolled.



Here, you can view the due date, status and progress of the user for each course on which they are enrolled. You can also click into each course to view its component modules and the user's progress on them. Finally, you can click the card action menu next to each enrollment to access a number of actions you can take:

- View Details - to view course modules and learner progress
- Un-enroll - to un-enroll the learner from the course
- Set Complete - to mark the learner as having completed the course
- Set Expiry Date - to set an expiry date for the learner to complete the course
- Edit Due Date - to change the due date for the course

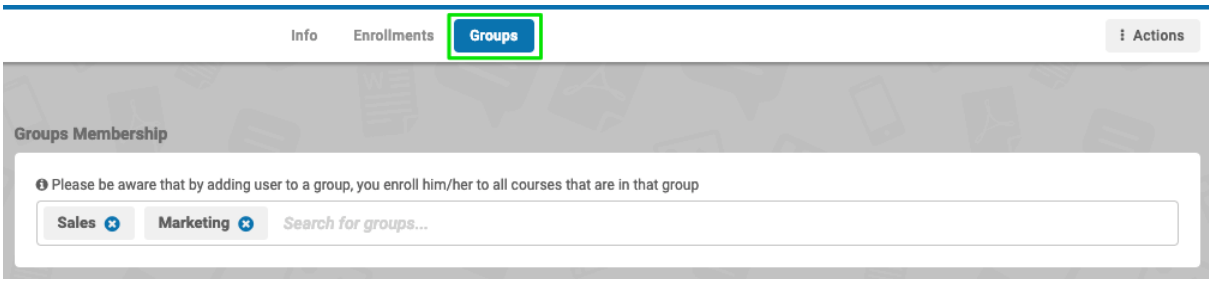
On the enrollments page, you can also click into the user's "Completed Courses" by selecting this from the card option to view the completion date, pass/fail status, and exam score (if any).



***Note**: If the user is enrolled on any learning paths, you will also see an overview of their progress here and the option to remove them from the learning path if required.*

Groups

The third item on the user profile secondary navigation menu is "Groups" . By clicking here, you can view all groups of which the user is a member. You can also add a user to a new group (by searching and selecting it) or remove them from an existing group.



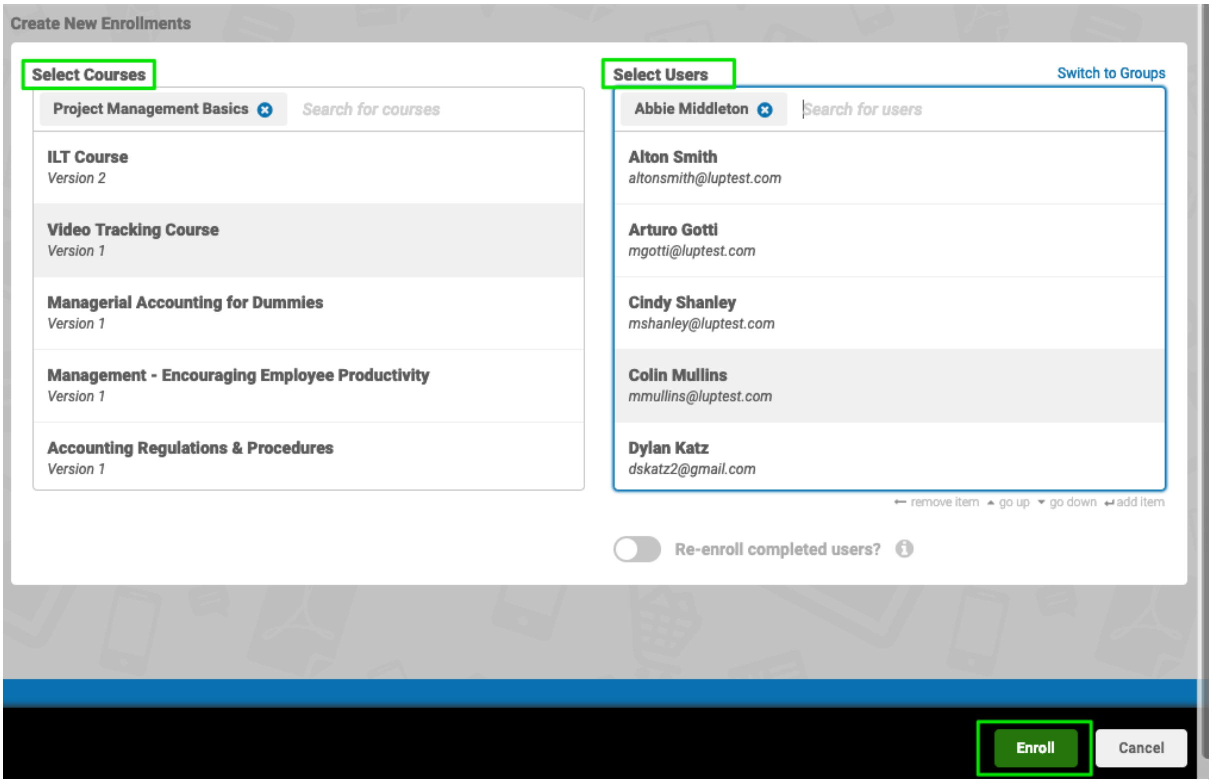
***Tip**: Throughout the user profile page, you can click the "Action" button on the top right hand side and select to change user type, enroll user or delete user.*

End of Section - Click to return to Table of Contents

8. Enrollments

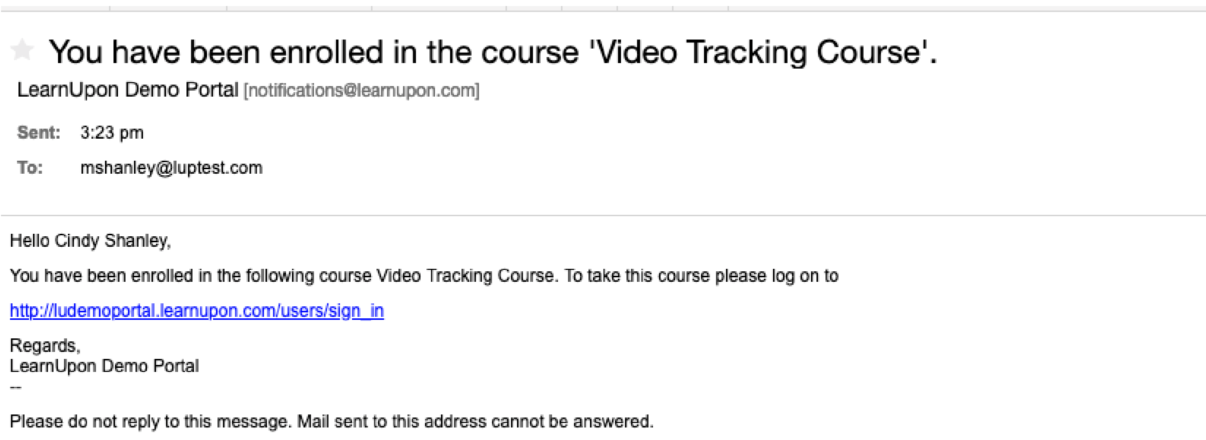
To create a new enrollment for a learner:

1. Navigate to the **Enrollments** page from the primary navigation menu
2. Search and select one or more courses (or learning paths) you wish to create the enrollment for
3. Search and select one or more users or groups
4. Click **Enroll**



***Note**: You can also choose to switch on/off the "Re-enroll completed users?" option here. Activate this switch if you wish to re-enroll any users that you have selected for the new enrollment that have already completed any of the courses selected.*

Your learner(s)/ group(s) will now be enrolled in the course(s)/ learning path(s) selected. If enrollment emails are enabled (within Settings), each learner will receive an email confirming the enrollment with a link to launch the course.



You have been enrolled in the course 'Video Tracking Course'.

LearnUpon Demo Portal [notifications@learnupon.com]

Sent: 3:23 pm

To: mshanley@luptest.com

Hello Cindy Shanley,

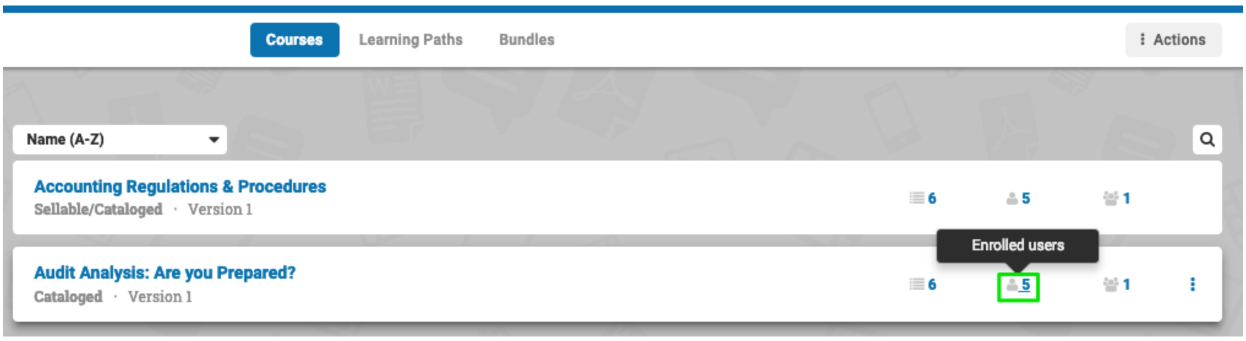
You have been enrolled in the following course Video Tracking Course. To take this course please log on to

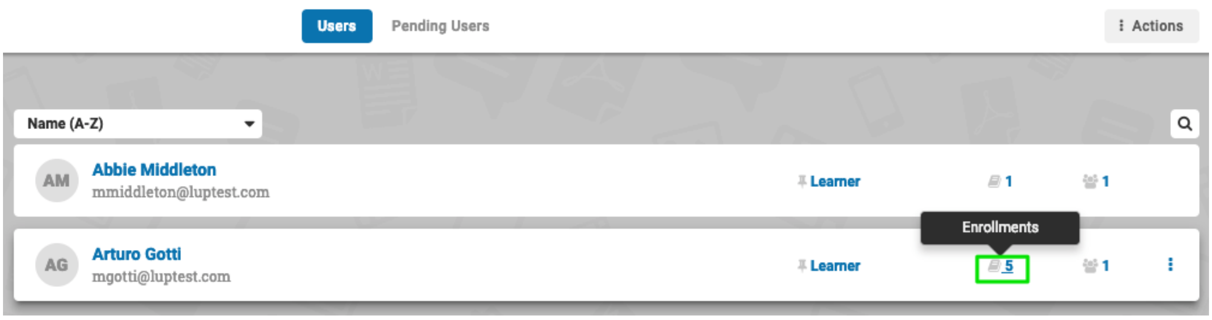
http://ludemoportal.learnupon.com/users/sign_in

Regards,
LearnUpon Demo Portal
--

Please do not reply to this message. Mail sent to this address cannot be answered.

***Tip**: Once your learners are enrolled, you can quickly navigate to enrollment information via quick links on the main courses page or the main users page.*



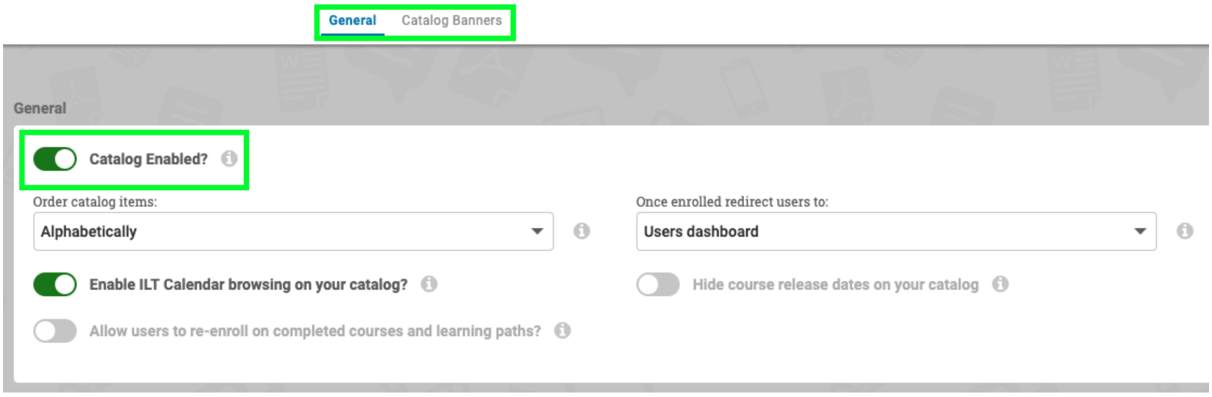


End of Section - [Click to return to Table of Contents]

9. Catalog

The catalog is where learners can browse and self-enroll on courses, learning paths and/or ILT Sessions. To use the catalog in your portal, you must first enable it. To enable the catalog:

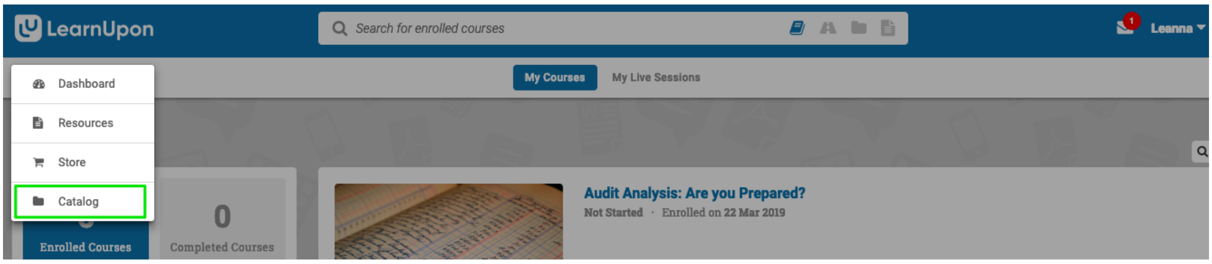
1. Navigate to **Settings > Internal Course Catalog > General Settings**
2. Switch the **Catalog Enabled?** option to on
3. Click **Save**



On this page, you can also choose how catalog items are ordered, enable ILT calendar browsing (displaying ILT sessions on a calendar display) or hide course release dates.

You also have the ability to redirect users once they enroll in a course. You can direct them back to the learner dashboard, the catalog, or directly into the course description.

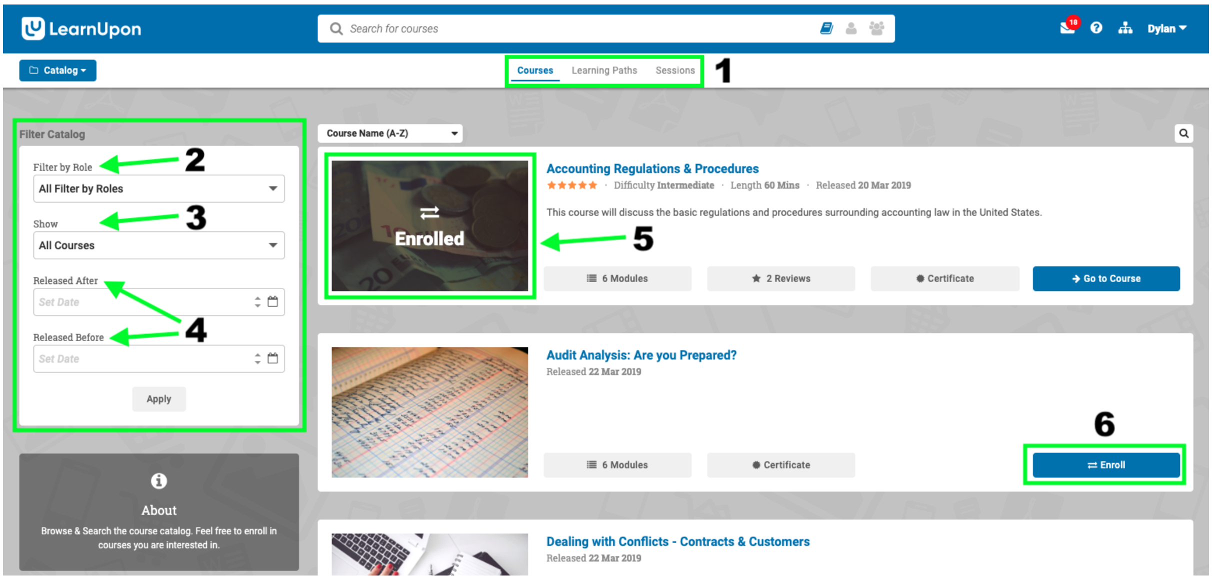
Once enabled, courses can be displayed in the catalog and **Catalog** will appear as an option on the learner's primary navigation menu .



Once a course, learning path or ILT session is created, you can choose to display it in the learner's catalog and also control, using group functionality, which learners can see the course, learning path and/or ILT session in their catalog. See 3.2.3.

***Important**: If your course, learning path or ILT session is sellable (i.e. being sold through your Storefront), then it is generally not advisable for it to be displayed in your catalog (because any learner that views it can self-enroll in it for free without paying).*

When a learner clicks into their catalog, they are taken to the following screen :

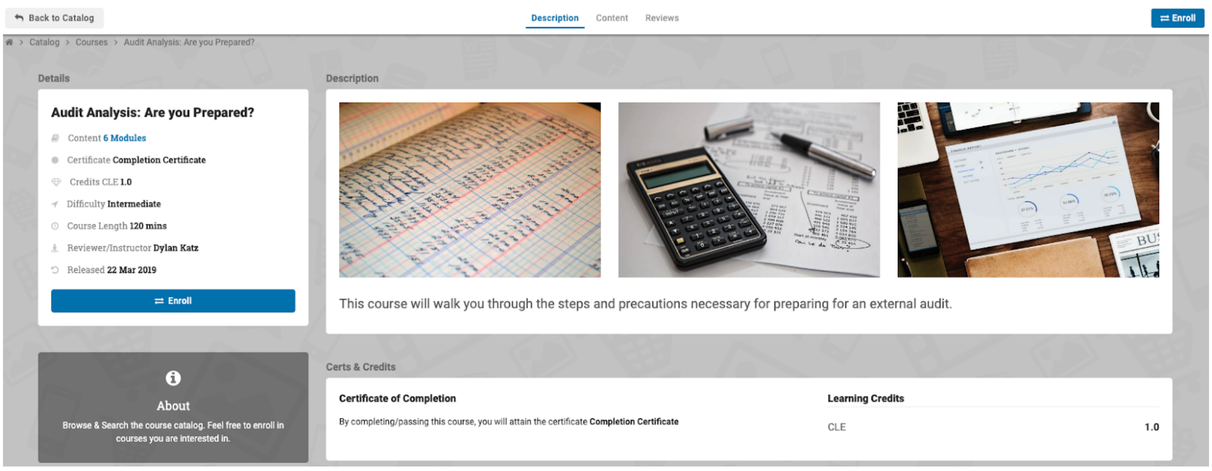


Here, the learner can:

1. Choose **Courses**, **Learning Paths** or **Sessions** from the secondary navigation menu to browse all types of content made available to them for self-enrollment.
2. Filter the catalog by category (based on the course and resource category options created in settings and assigned to your courses/learning paths).
3. Show all courses in the catalog or just those available for enrollment.
4. Filter courses by release date - courses released either before or after a specific date.
5. If a learner is enrolled in a course, an overlay will appear on the course thumbnail showing the learner's current status: Enrolled, In Progress, or Passed.
6. Clicking the **Enroll** button allows a learner to self-enroll in a course.

If the learner clicks the course title, they will be taken to the course description page where they can find information about the course. Under the secondary navigation menu , along with the description, they can view:

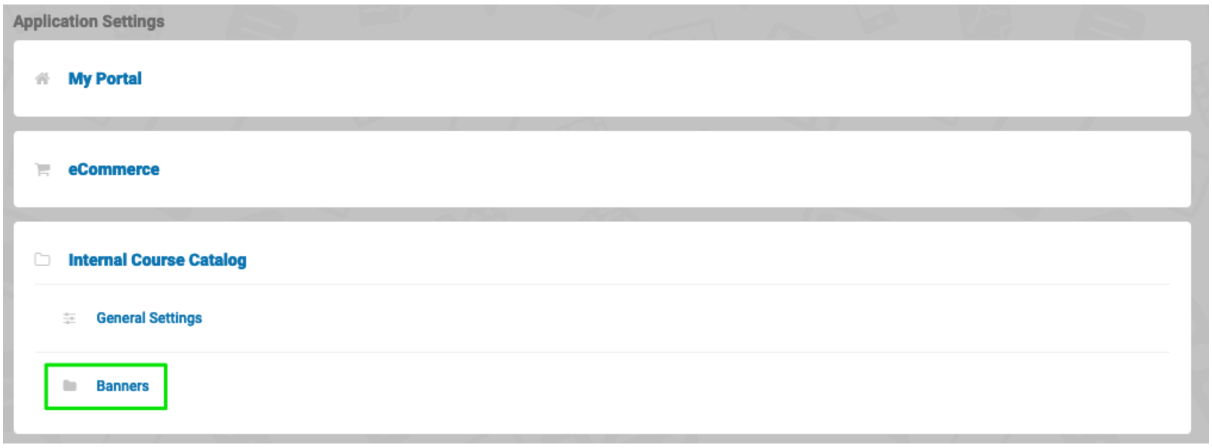
- Content - detail on each of the modules within the course
- Certs & Credits - detail on any certification or learning credits awarded
- Reviews - browse any reviews submitted by previous learners



Your learners can also enroll in the course from this page. Once a learner enrolls on a course, learning path or ILT session through the catalog, it will display in their dashboard (under Enrolled Courses) for them to launch and complete at their convenience.

9.1 Catalog Banners

Catalog banners provide further options for branding, promotion and communication, specifically within your catalog. They have the same functionality as dashboard banners but exist independently and only appear within the catalog. They can be customized to contain rotating multimedia, image or (standalone) centered content banners. To enable/edit catalog banners, click into **Settings > Internal Course Catalog > Banners**.



You will then be taken to the banner editing screen. For full detail on how to edit and enable the different banner types, please see **Section 2.2**.

End of Section - [Click to return to Table of Contents]

10. Client Portals & Licensing

LearnUpon allows you to create client portals and license courses to those portals. A client portal is a sub-portal of your main (parent) portal that can be branded and customized for a particular client or alternative user group. The client portal has its own URL, separate users, and optional separate administrator(s).

***Note**: The number of client portals you can create varies by LearnUpon plan - the higher your plan, the more client portals you can create. Client portals have the same functionality as the top-level parent portal except you cannot create portals, license courses, or access LU support from a subportal.*

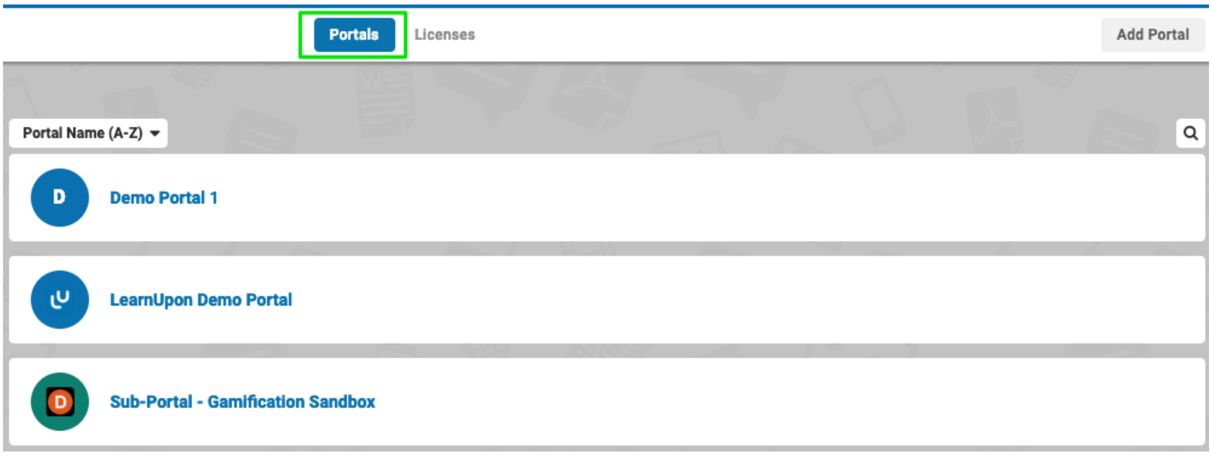
10.1 Client Portals

To create a new Client Portal:

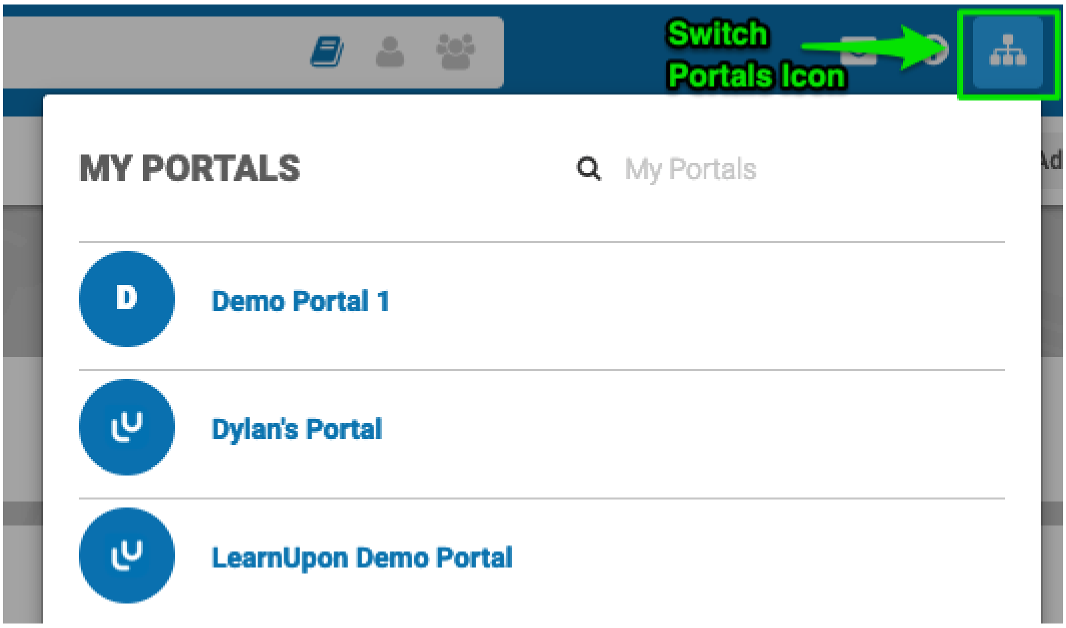
1. Select **Portals & Licenses** from the primary navigation menu
2. Click **Add Portal**
3. Enter a name, description and subdomain for the new portal . The subdomain (colored green in following example) forms part of the URL to access the Portal e.g. http://**abcclient**.learnupon.com
4. You will also see an option to copy over the settings of the top-level portal. This will copy email settings/templates, welcome messages, SSO Settings, Categories, Catalog settings, and several more options.
5. Click **Save**

Once created, you can manage and access your client portals at any time by selecting **Portals & Licenses** from the primary navigation menu. This will take you to a list of your client portals where you can click into a Portal to access it.

Tip: Client Portals provide several key benefits, which you may find useful. Aside from separate branding and the ability to license down your Courses, they enable you to delegate responsibility for the Client Portal to a separate Administrator (i.e. who you can choose to only have access to the Client Portal).



You can also navigate between portals via the Switch Portals button. Once you click the icon, located in the top-right corner of your screen, you will be presented with a searchable list of all of your Portals.



10.2 Licensing

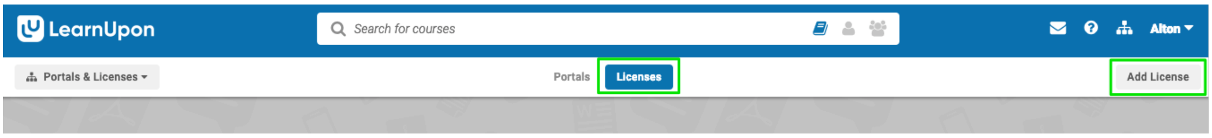
Once you have created a client portal, you have the option to license out courses from your parent portal to your client portals. There are several benefits to doing this:

- You can control access to the Licensed Course by specifying:

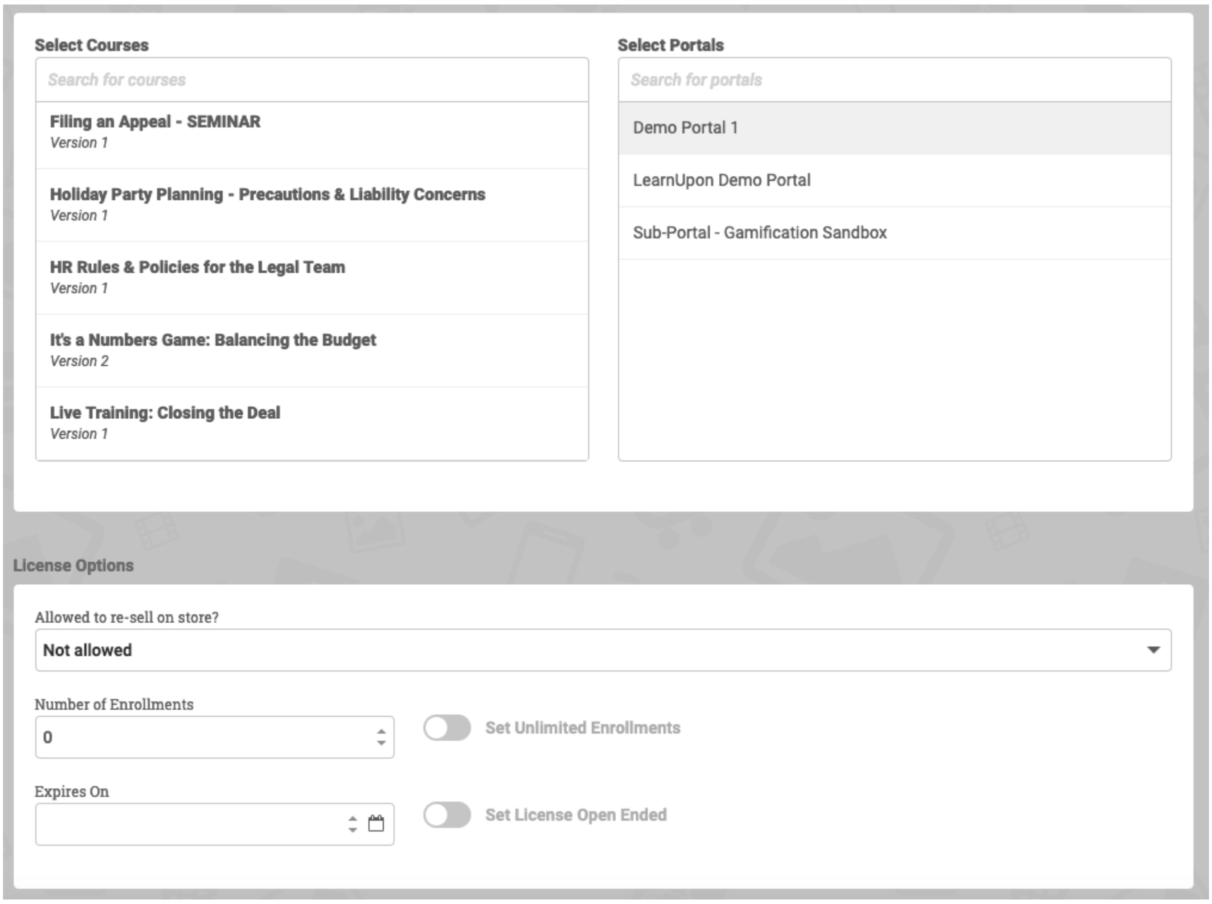
- the number of Licenses available to the Client Portal i.e. the number of learners within the Client Portal that can enroll in the Course.
- An expiry date, after which learners within the Client Portal will no longer be able to access the Course.

- If you make any changes to the Course within your Parent Portal, these changes will automatically trickle down to all Licensed versions of the Course. This can be very useful i.e. if you have the Course licensed to many different Client Portals.

To create a new Course License:
1. Select **Portals & Licenses** from the primary navigation menu
2. Select **Licenses** from the secondary navigation menu
3. Click **Add License**



4. Select the course(s) and corresponding portal(s) you wish to license to
5. Configure the license options (discussed below). Click **Save.**

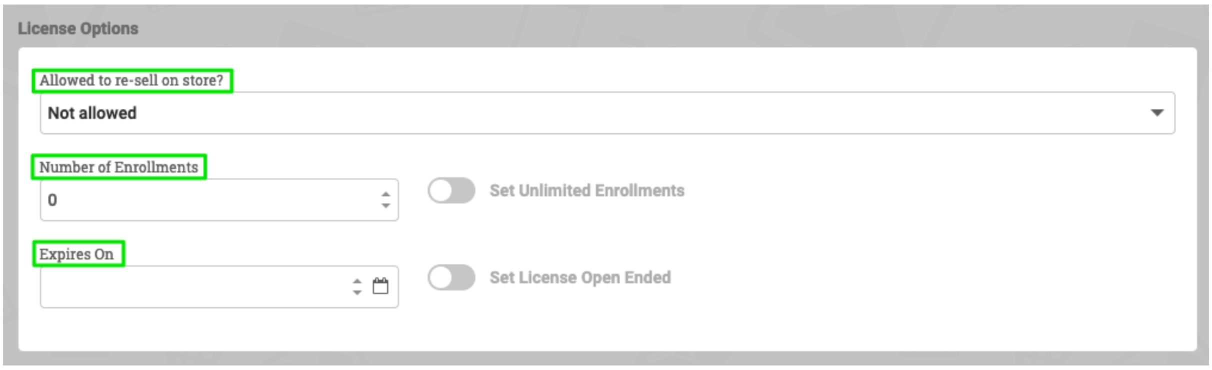


There are a number of different license options :
- Allowed to re-sell on store? - this contains three sub-options, which are:

- Not Allowed - the Client will not be able to display the Course in their Storefront for sale
- Allowed without price change - the Client will be able to display the Course in their Storefront for sale, but only at the price you have set
- Allowed with price change - as above but the Client can set the price of the Course when displayed for sale in their Storefront

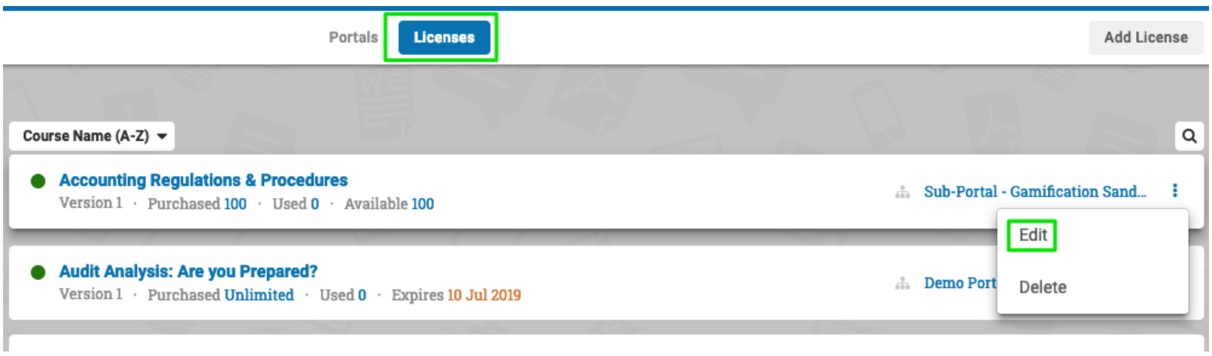
- Number of Enrollments - you can enter the number of enrollments allowed on the Course, or alternatively toggle the **Set Unlimited Enrollments** switch to on.

- Expires On - you can set an expiry date for the Licensed Course, after which it will no longer be accessible to Client Portal learners. Alternatively, you can switch the **Set License Open Ended** toggle to on, thereby applying no expiry date.

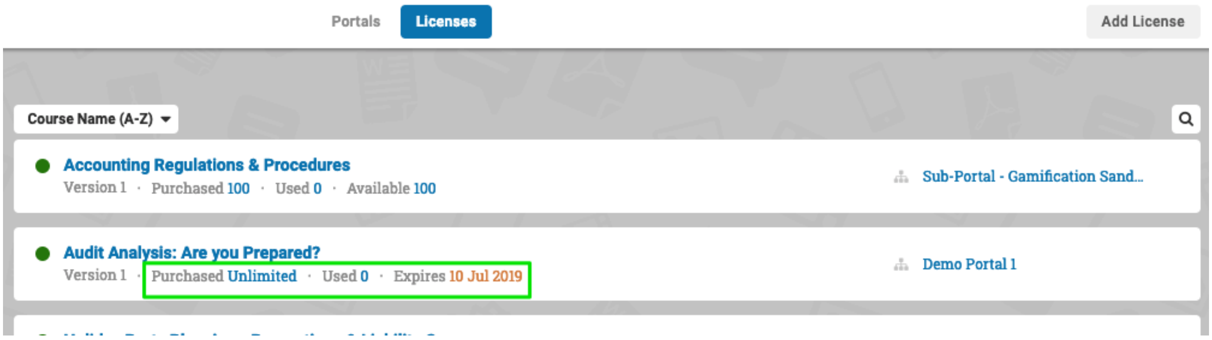


Once created, you can edit a Course License at any time. To edit a Course License:

1. Select **Portals & Licenses** from the primary navigation menu
2. Select **Licenses** from the secondary navigation menu
3. Click the Card Action Menu next to the License you wish to edit
4. Click **Edit**



From this Licenses page on your Parent Portal, you can also view all Licensed Courses and the license usage of each Client Portal . This information can be useful in terms of predicting future client License requirements/ renewals etc.



End of Section - [Click to return to Table of Contents]()

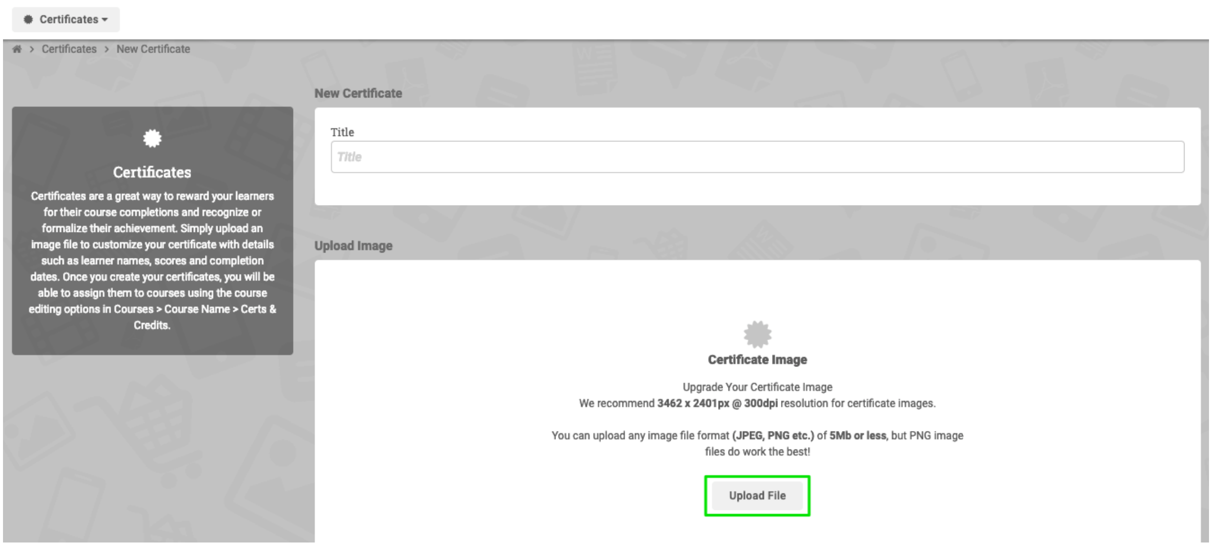
11. Certificates

In LearnUpon, you can import, customize, and award certificates to your learners upon completion of a course. Certificates are a great way to reward your learners and recognize their achievements. Once you create your Certificates, they are stored in LearnUpon and can be assigned to any Course and/ or Learning Path.

11.1 Creating a Certificate

To create a Certificate, you must first import a template Certificate:

1. Select "Certificates" from the primary navigation menu
2. Click "Add New Certificate"
3. Name your Certificate and click "Upload File"
4. Browse and select a Certificate template to upload
5. Click "Save"

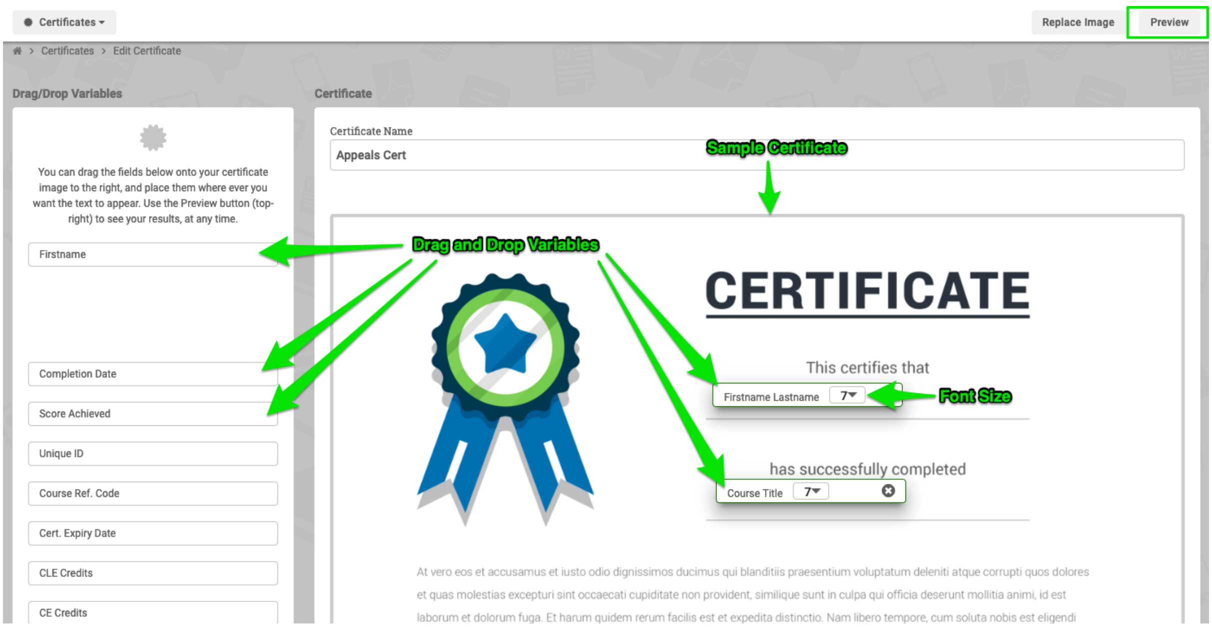


Tip: The Certificate template can be any image type (e.g. GIF, JPEG, PNG), and we recommend a size of 3000 x 2250 pixels at a resolution of 300 dpi. If you upload a Certificate at or close to these specifications, it will result in a high quality Certificate, which is less grainy when viewed and printed.

Once your template is imported, there are a number of variables you can choose to drag and drop on to your Certificate. These include:

- First Name
- First Name, Last Name
- Course/ Learning Path Title
- Completion Date
- Score Achieved
- Number of Learning Credits (if enabled)
- Certificate Expiry Date
- Unique Certificate ID
- Any Custom User Data field (if set up in your Portal e.g. Dept, Location etc.)

Simply drag and drop these variable fields onto your Certificate image wherever you would like the text to appear. Once placed, you will choose your preferred font size for each variable. Finally, you can preview your Certificate by clicking the **Preview** button in the top right of your screen.

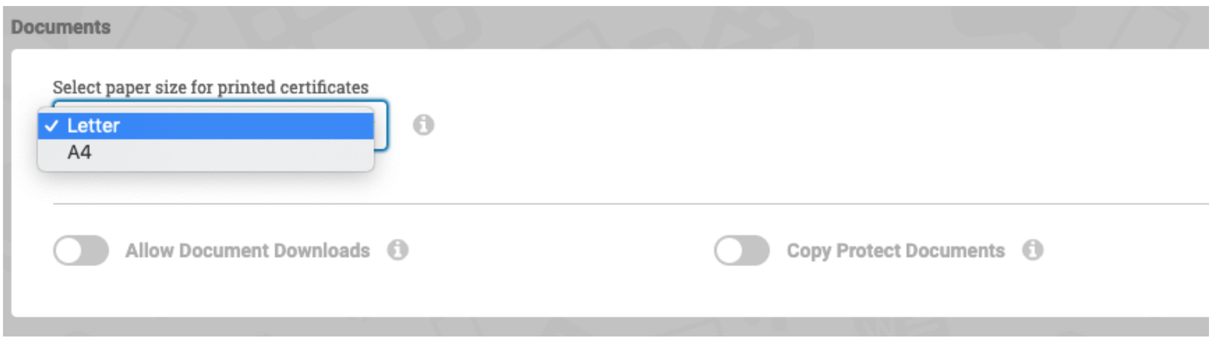


Tip: While there is no right or wrong approach to how you design your certificates, a font size of ~10 for the Learner Name and the Course Title field tends to work best. A smaller font of ~7 works well for other variables like Score Achieved, Completion Date, Number of Credits, etc.

Previewing your certificate generates a PDF of the draft . You can use this preview feature to adjust your variables (type, size, placement etc.) until you are satisfied with the finished product.

Certificates can be printed in Letter format (commonly used in the US) or A4 format (commonly used in Europe) depending on your preference. To select one of these options:

1. Navigate to **Settings > Courses > General Settings**
2. Under **Select paper size for printed certificates**, select **A4** or **Letter**
3. Click **Save**



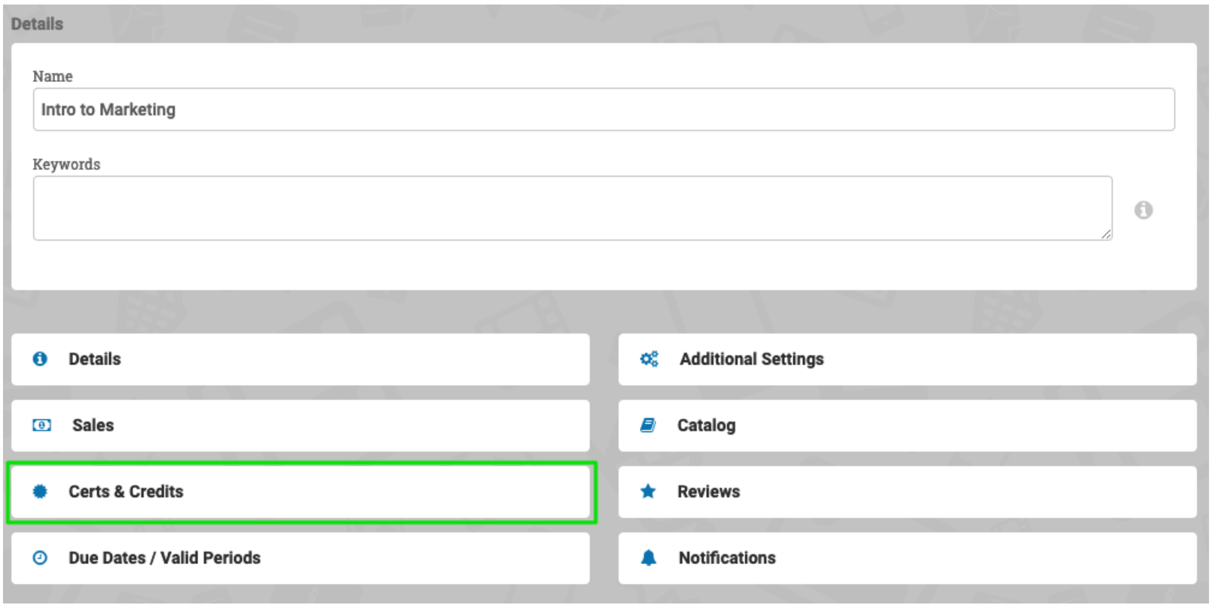
***Note**: This is a Portal-wide setting, which will apply to all current and future Certificates.*

11.2 Linking a Certificate to a Course or Learning Path

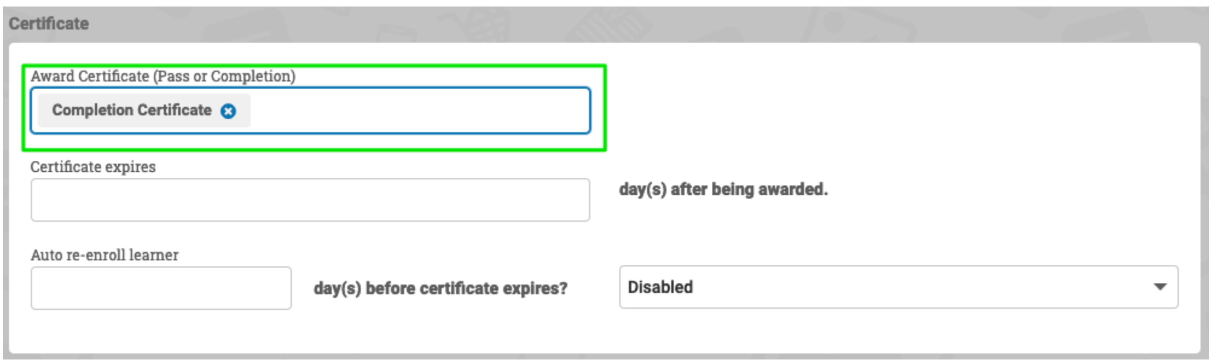
Once you have created your certificate(s), you will want to link it to your course(s) or learning path(s) so that it will be awarded to the learner upon successful course completion.

To link a Certificate to a Course navigate to **Courses > Course Name > Certs & Credits**

To Link a Certificate to a Learning Path, navigate to **Courses > Learning Paths > Learning Path Name > Certs & Credits.** Learning Path certificates can be awarded in addition to the course certificates, or instead of them.



Enter the name of the Certificate to be awarded upon course completion and click **Save**.



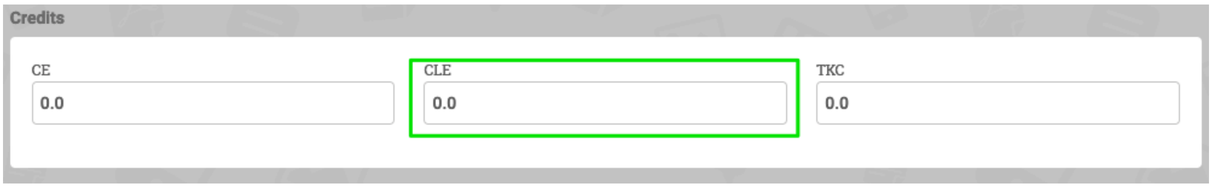
You will notice a number of additional options on this page:

- **Certificate Expires** - enter a value to expire the certificate a specific number of days after being awarded to the learner.

- **Auto Re-Enroll Learner** - enter a value to automatically re-enroll every learner on this Course a specific number of days before their original Certificate expires.

- **Disabled/Enabled** - this selection simply enables the Auto re-enrollment option.

***Note**: LearnUpon also enables you to award c. 15 different Learner Credits to your Learners for completing a Course. These must first be enabled under Settings > Courses > Learning Credits. Once enabled, they will appear on the "Certs & Credits" page as an option to award to Learners on Course completion.*



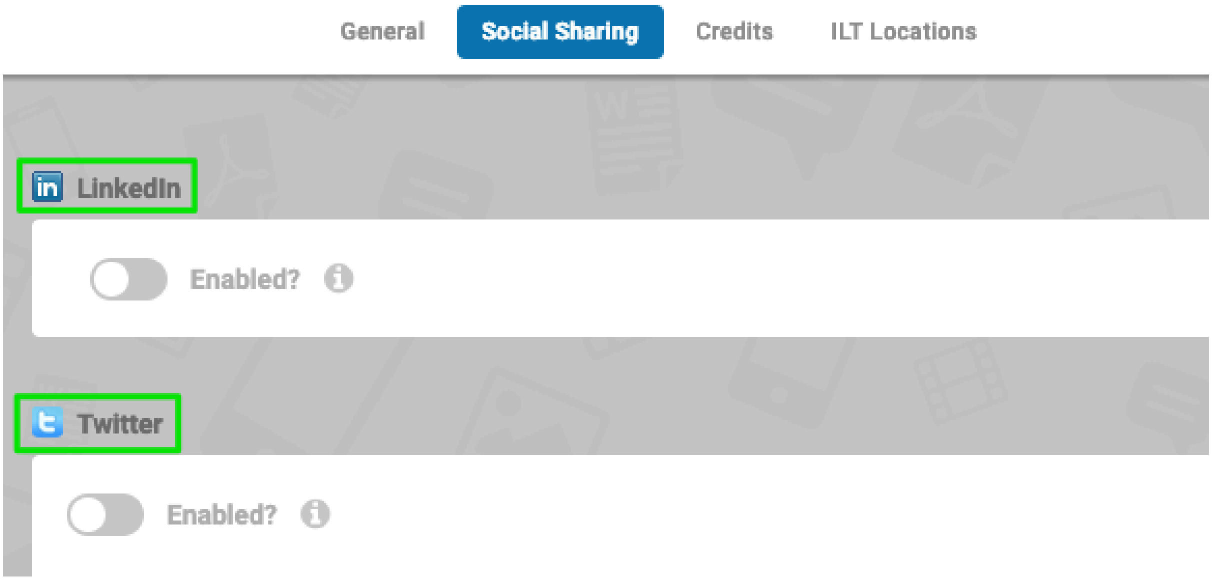
***Tip**: As an Administrator, you can download a Learner's Certificate if required. To do this:*

1. *Select **Users** from the Primary Navigation menu*
2. *Click into the user's Profile*
3. *Select **Enrollments** from the Secondary Navigation menu*
4. *Click the **Completed Courses** card*
5. *Click the ellipses on the right of the relevant Course Name row*
6. *Click **Download Certificate***

11.3 Social Sharing of Certificates

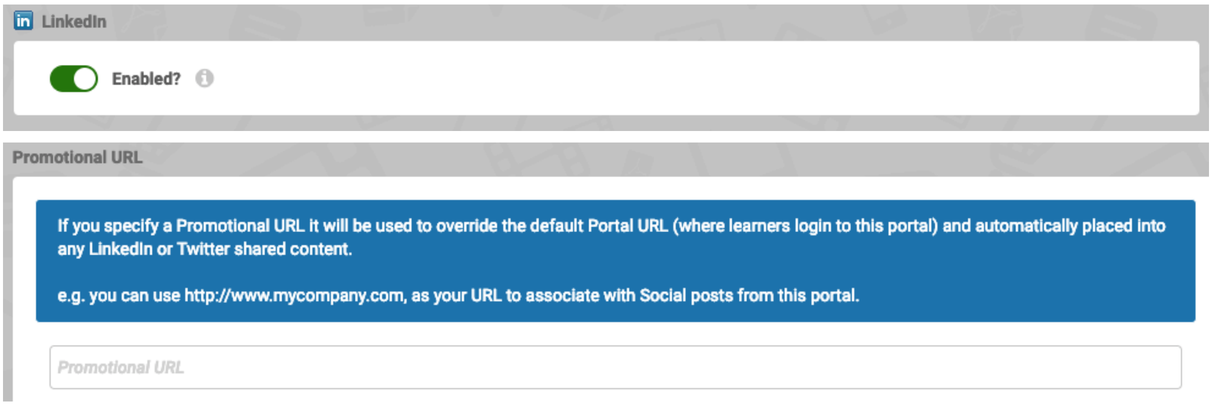
A fun feature of LearnUpon Certificates is that they can be shared by learners on Social Media via their LinkedIn or Twitter accounts. This enables your learners to push their Certificates to their LinkedIn profiles using LinkedIn's "add to profile" feature or to tweet their Course completions directly to their Twitter feeds. To enable this sharing feature for your learners:

1. Select **Settings** from the primary navigation menu
2. Click **Courses** and then **Social Sharing**
3. Enable the setting for LinkedIn and/or Twitter as desired
4. Click **Save**

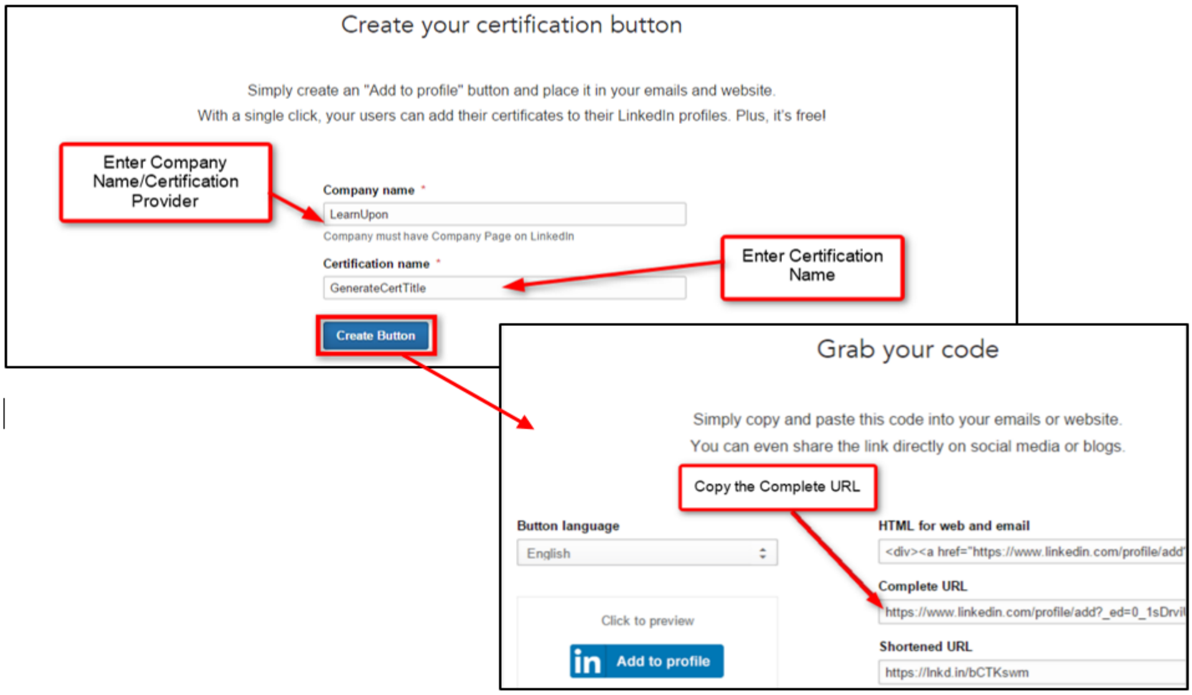


LinkedIn Sharing

If LinkedIn Sharing is enabled, learners can post their earned certificate(s) to their LinkedIn profile page. To set this up for your learners, you will be asked to enter a LinkedIn URL. To establish that URL, click the **i** icon and then the **LinkedIn Profile** link.



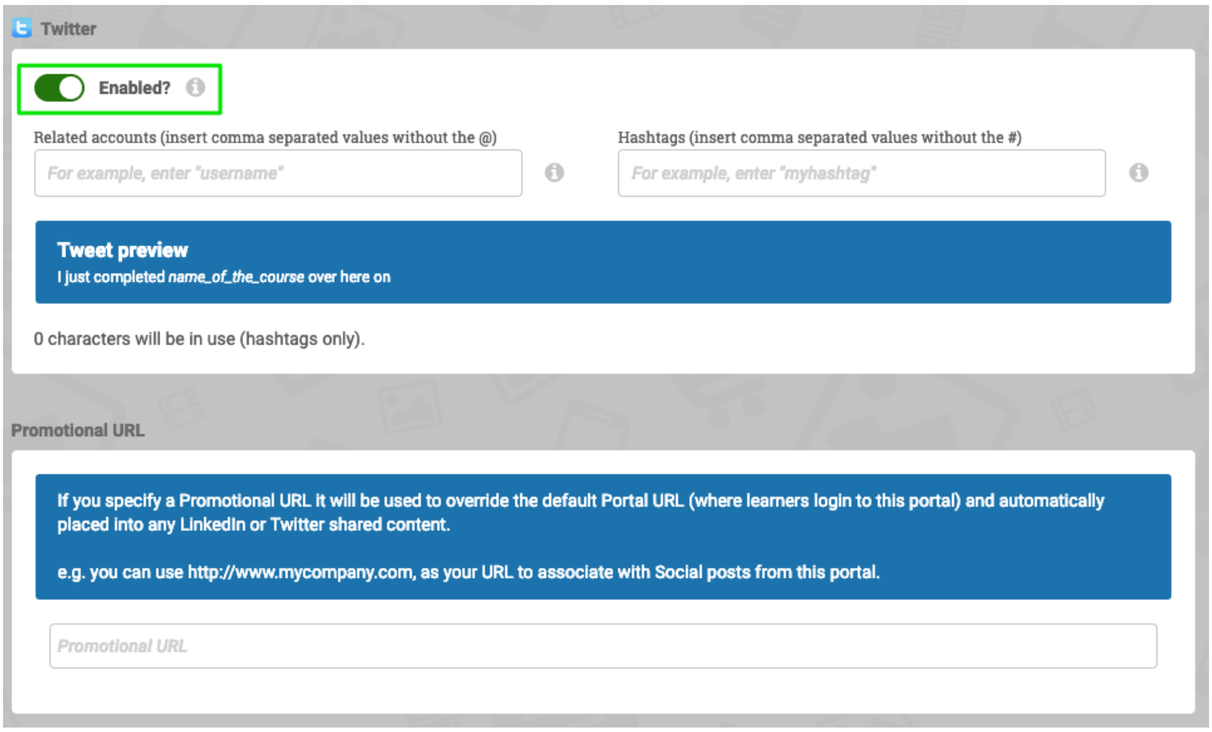
A new tab will open. Under the **Getting Started** section, you must log in to your company LinkedIn account and enter your LinkedIn credentials. Then, enter your company name as it appears in LinkedIn, a certification name, and click the **Create Button** option . You can then copy the **Complete URL** code and paste it into the **API URL** field in LearnUpon and click **Save**.



Your learners will now be able to push their Certificates to LinkedIn.

Twitter Sharing

If Twitter sharing is enabled, learners can tweet their Course completions directly to their Twitter feeds. To enable this, switch the Twitter **Enabled?** toggle on .



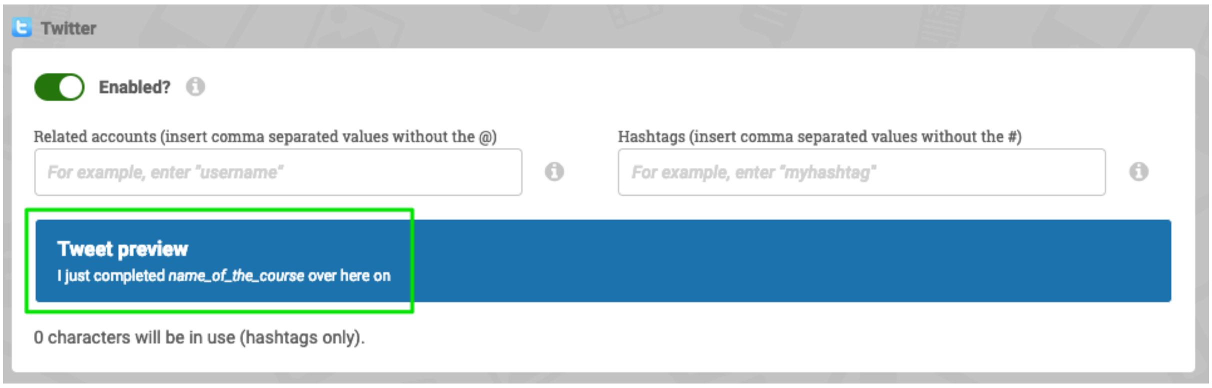
Once enabled, two additional options will appear:

- Related accounts - here, you can list Twitter accounts that will be suggested to learners to follow after they have posted a tweet. This is a great way to promote related Twitter feeds to your Portal. Twitter will display at most two suggested accounts (that the learner does not yet already follow). If the learner already follows all the suggested accounts, no accounts will be displayed.

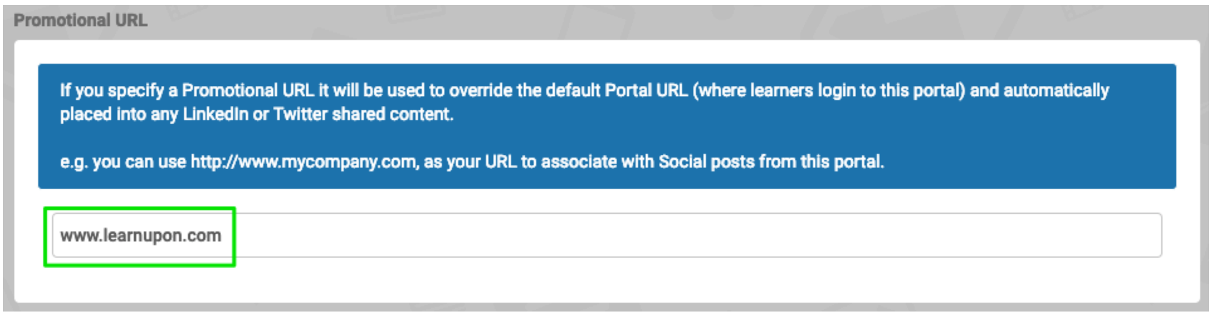
- Hashtags - here, you can associate certain hashtags with completion tweets. For example, if you enter “completed,course,finished” here, it will be shown as #completed #course #finished in the learner’s feed.

Note*: Keep in mind that a tweet can be no more than 280 characters and the hashtag does not count towards the 280 character limit.*

Once saved, a preview of the learner’s tweet will appear .



Finally, you can specify a different Promotional URL (i.e. other than the one for your LearnUpon Portal) to be included on any Social Media posts sent from the LearnUpon system. For example, you might enter your company’s corporate website so that followers of your learners on Twitter/ LinkedIn will see that site instead of the learning portal site.



End of Section - [Click to return to Table of Contents]

12. Reports

Reporting functionality in LearnUpon allows you to access and analyze your data, gather insights into your learners' performance, and help with decision-making relating to your Courses and learners. Your data can be exported and/or scheduled for automated reporting to chosen stakeholders at regular intervals. Reports can be customized using many different filtering options.

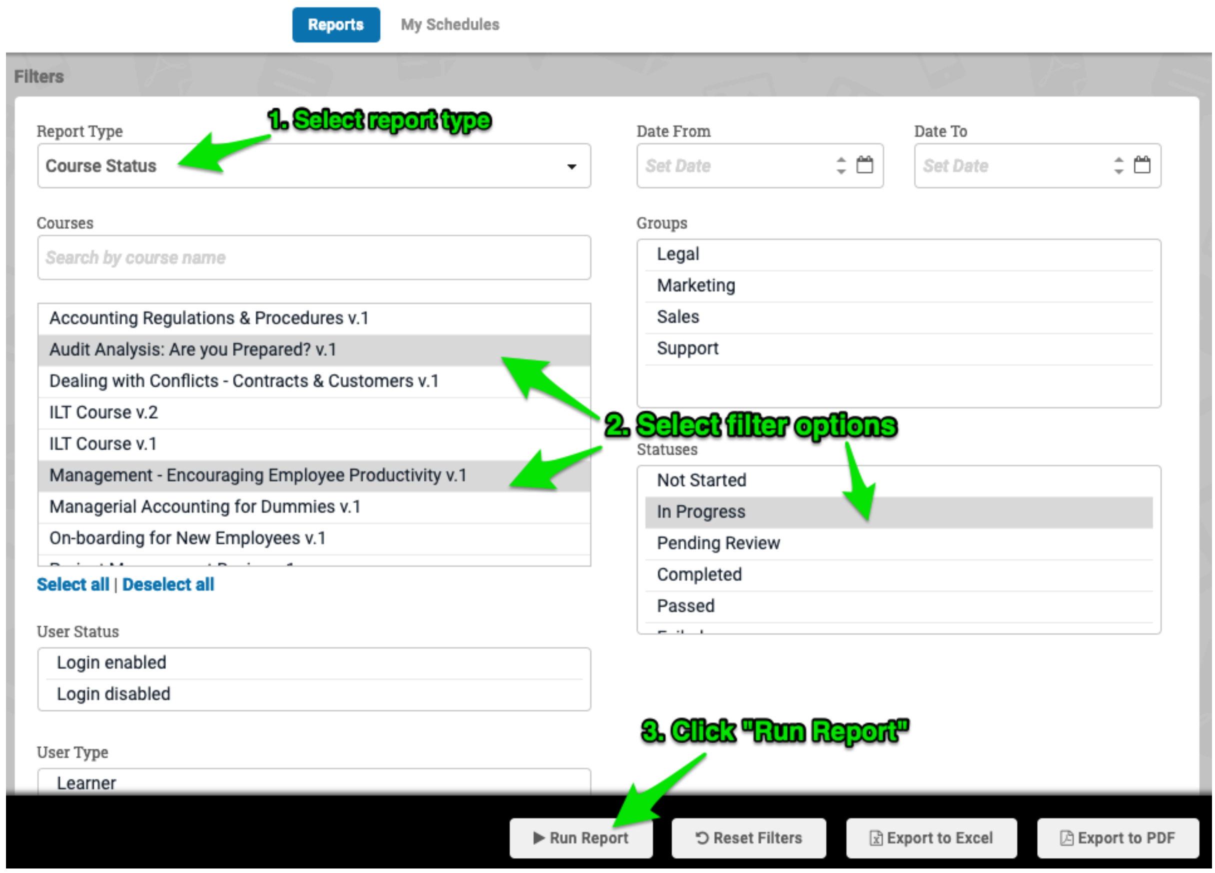
12.1 Report Types

There are twelve Report types in LearnUpon. These are:

- **Course Status Report** - enables you to view learner progress on a specific Course or Courses
- **Course Modules Report** - enables you to view learner progress by Module on a specific Course or Courses
- **Course History Report** - provides a breakdown of learner Enrollments by Course and completion status.
- **Course Sales Report** (only available if you have enabled e-Commerce) - provides a breakdown of Courses sold through your Storefront
- **Learning Paths Report** (only available if you have enabled Learning Paths) - enables you to view learner progress on a specific Learning Path
- **Certifications and Credits Report** (only available if you have created a Certificate or enabled Credits) - enables you to view Certificates or Credits acquired by learner
- **Exams Report** (only available if you have published Exams) - enables you to view a breakdown, by list or chart, of how learners are answering your Exam questions
- **Surveys Report** (only available if you have published Surveys) - enables you to view a breakdown, by list or chart, of how learners are answering your Survey questions
- **SCORM Exams/ Interactions Report** (only available if you have published SCORM Courses) - enables you to view a breakdown, by list or chart, of learner SCORM exam results
- **Tin Can Exams/ Interactions Report** (only available if you have published Tin Can Courses) - enables you to view a breakdown, by list or chart, of learner Tin Can exam results
- **ILT Report** (only available if you have enabled Instructor Led Training) - enables you to run an ILT report by Course, User, Instructor or Location.
- **Gamification Report** (only available if you have enabled Gamification) - enables you to view Leaderboard and Points History information.

To run a report:

1. Select **Reports** from the primary navigation menu
2. Select the Report you wish to run from the menu
3. Set the filter options you wish to apply to your Report
4. Click **Run Report**

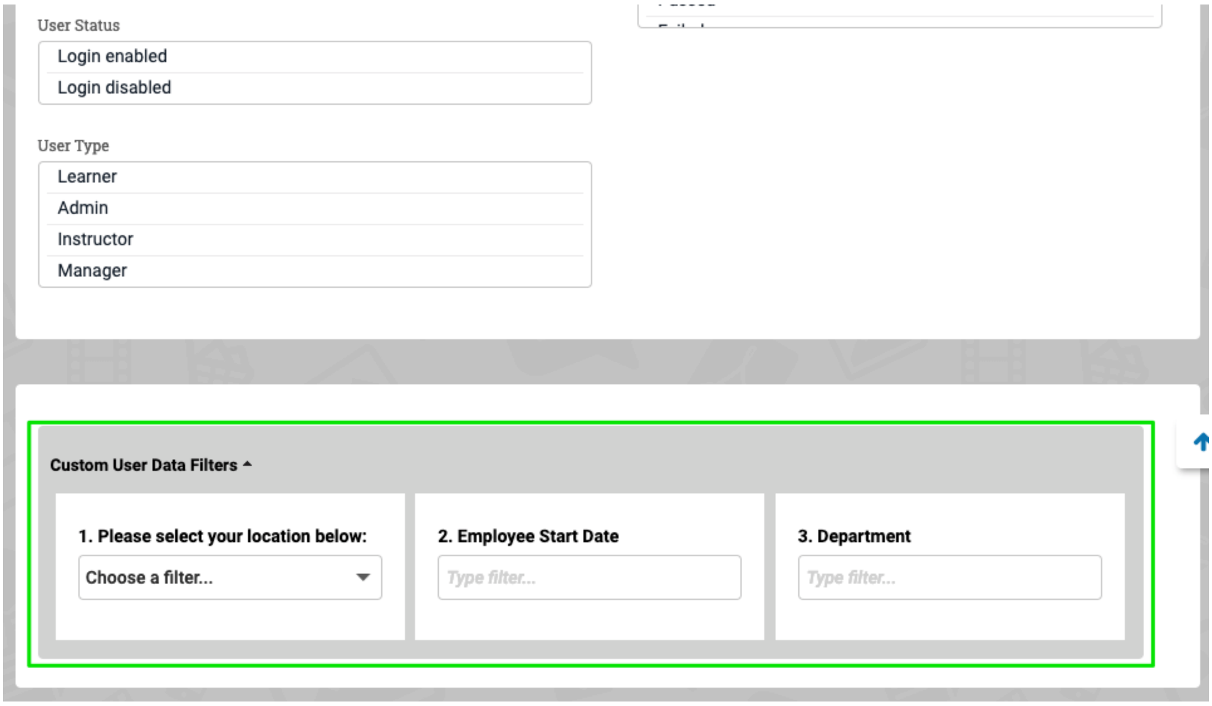


***Tip**: Hold down the Ctrl key to multi-select options within a filter menu e.g. Courses above.*

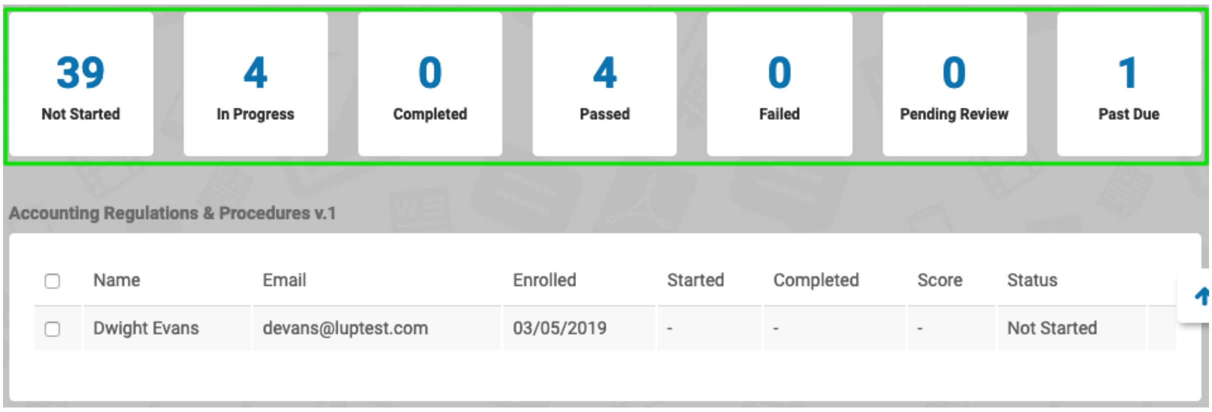
Depending on the Report you are running, there exist a number of different filter options:

- Course - to report on one or more specific Courses
- User - to report on one of more specific users
- Output format - chart or transcript
- Date Range (optional - if no dates are selected, all data is returned)
- Group - to report on one or more specific Groups
- Course Status - to report by one or more of the following Course Status: Not Started, In Progress, Pending Review, Completed, Passed, Failed and/or Past Due

***Important**: A very useful feature in LearnUpon is the ability to filter your Reports by Custom User Data. If you have enabled Customer User Data (within Settings) to collect certain information about your Learners, these data fields will appear at the bottom of the "Filter Options" menu and you can run reports against them e.g. in the example below, a report can be filtered by Location, Employee Start Date, and/or Department.*

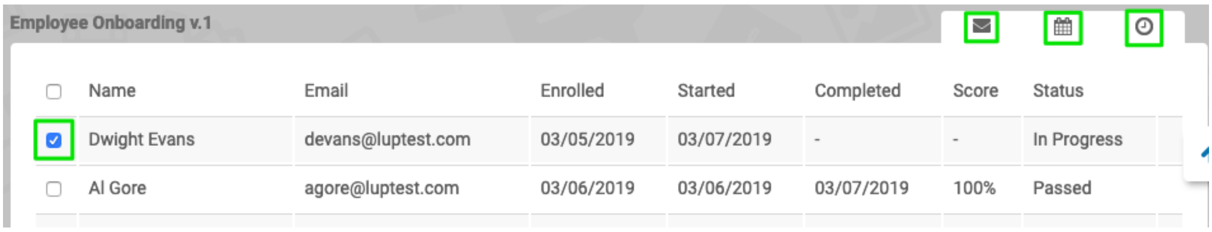


Once you run a report, a summary of results is displayed along the top followed by detailed individual records beneath .



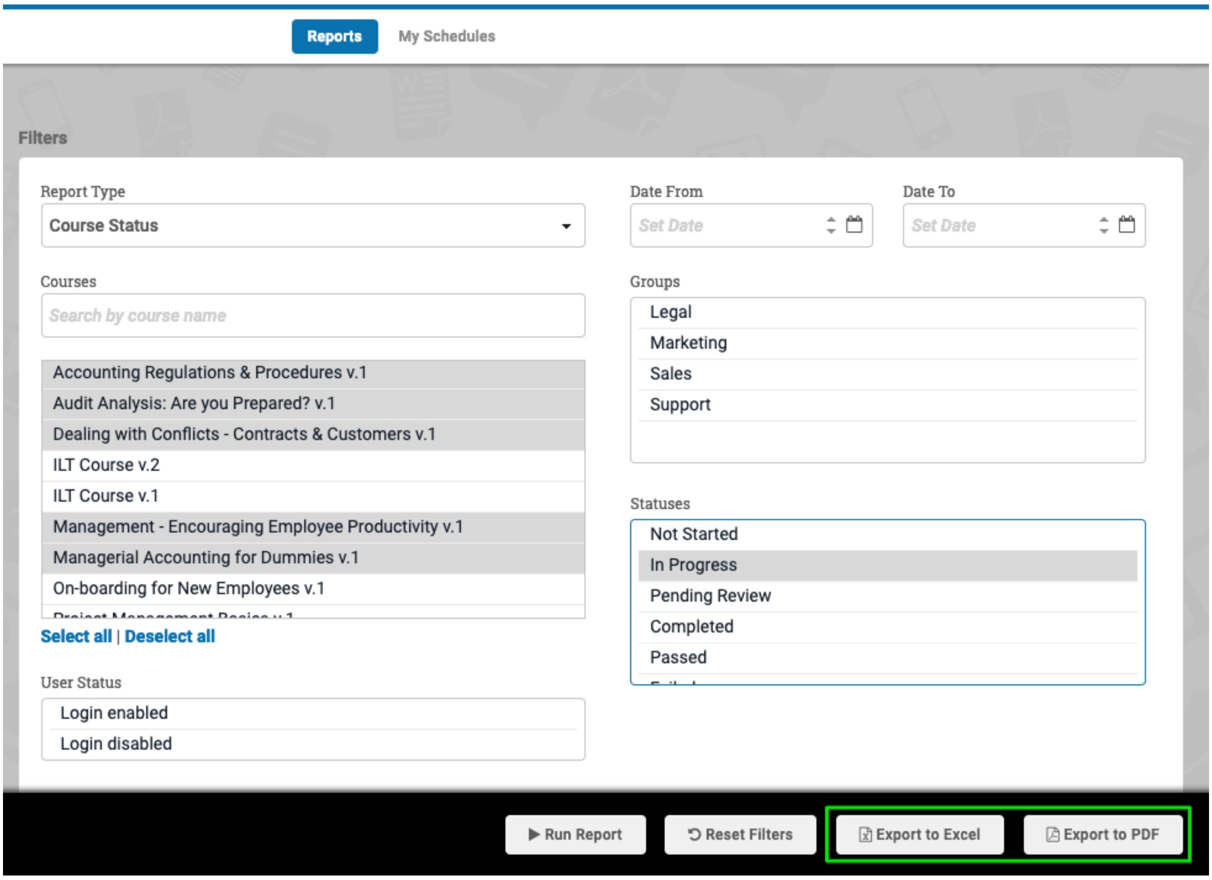
You can click on any of the summary results cards to further filter the detailed records displayed beneath. A very useful feature on the detailed record results screen is the ability to directly message a learner(s), amend their Course Expiry Date, or reset their Course Due Date.

To do this, tick the checkbox beside the relevant learner and click the Message icon to send a direct message, the Calendar icon to change the Expiry date, or the Clock icon to reset the Course Due Date.

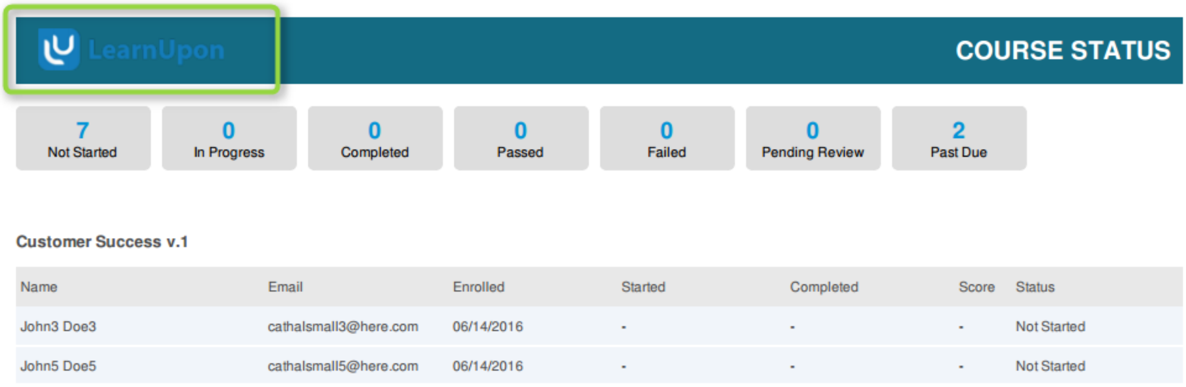


12.2 Exporting Report Data

All LearnUpon Reports can be exported to PDF (for printing) or to Excel (for granular detail and analysis). Export options can be found at the bottom of the Reports screen :



An export to PDF will by default contain your logo and colors.



For the most detailed (granular) data, it is recommended to export your Report to Excel e.g. the table in outlines the data available from a Course Status Report once exported to Excel.

enabled	Yes / No
expires	Yes / No
course_name	Course Name (Text)
enrolled	Date
started	Date
last_accessed	Date
last_accessed_module	Module Name (Text)
completed	Date
pass_mark	%
score	%
status	Passed / Not Started / In Progress
can_re-attempt?	Yes / No
percentage complete	%
Expiration date	Date
Custom Fields	Free Text / or Selected from drop down

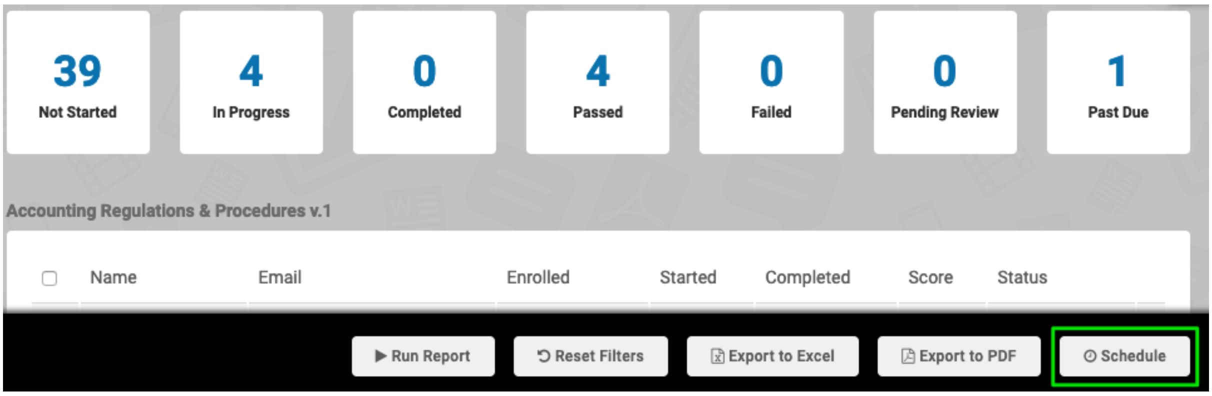
***Tip**: LearnUpon reports exported to Excel always contain the most detail and information.*

12.3 Scheduling Reports

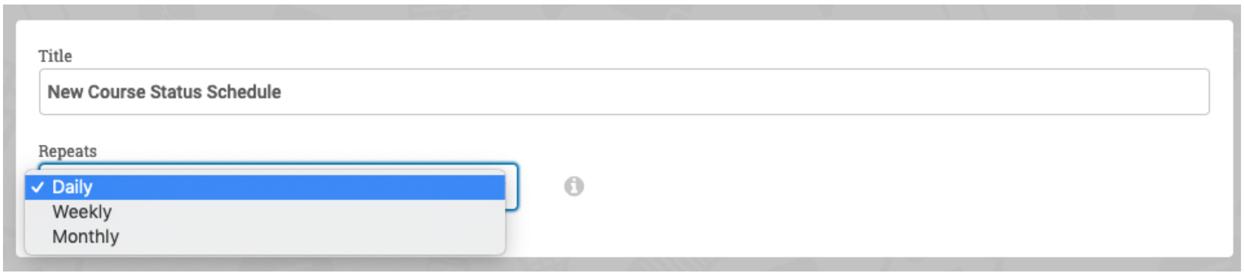
LearnUpon also allows you to schedule reports to run automatically daily, weekly, or monthly and to be sent to specified stakeholders.

***Note**: Please be aware that Scheduled Reports only capture information since the last ran Scheduled Report i.e. it provides a snapshot of activity during the interval period between reports. If there is no Learner Activity since the last Scheduled report, no report will be sent.*

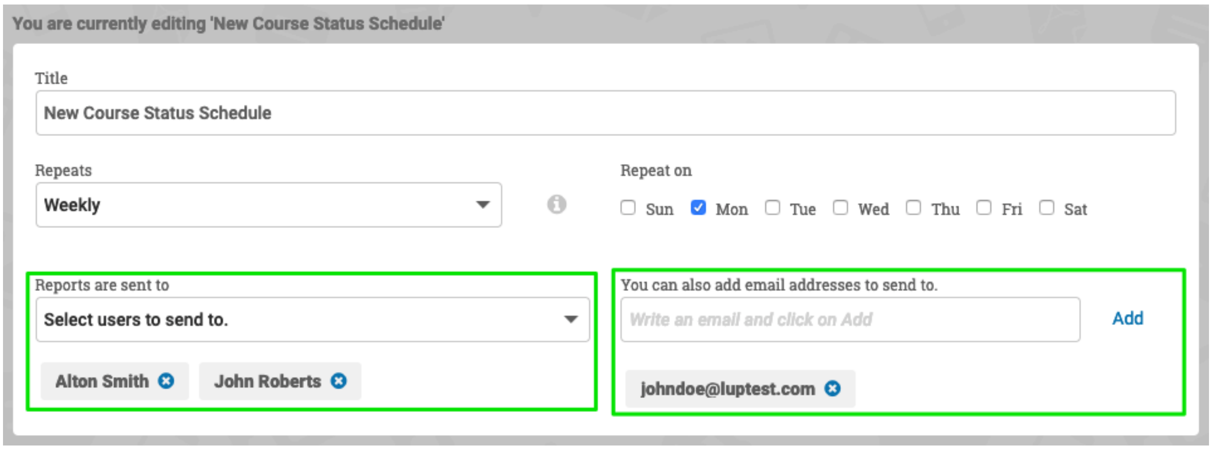
After you run a Report, in addition to options to export it to Excel or PDF, you will notice a **Schedule** button appears.



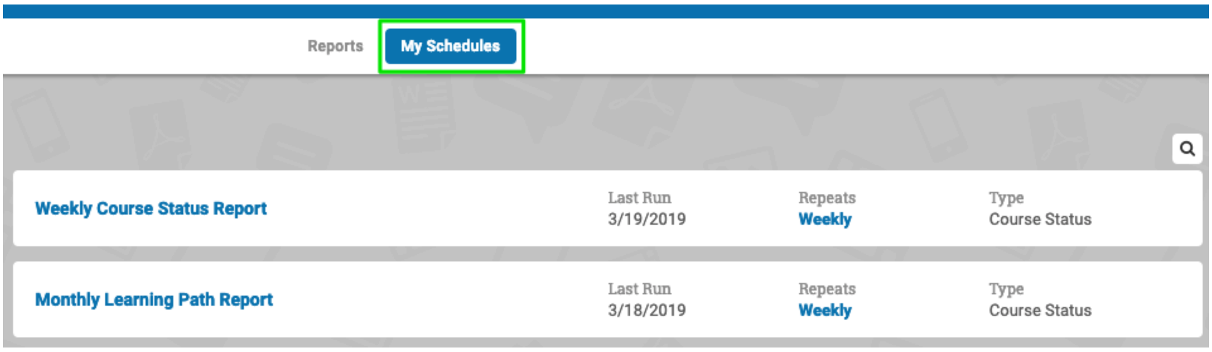
Select **Schedule** to land on the page displayed below. Here, you can set the frequency of your Scheduled Report to daily, weekly, or monthly.



Once you have selected the Report frequency, you can decide which stakeholders are to receive it. This is achieved by selecting from any existing user in your Portal or by entering an external email address . The Reports will arrive as a zip file containing both Excel and PDF formats.



***Note**: View, edit or delete your Scheduled Reports by clicking **My Schedules** and then the ellipsis to the right-hand side of a Scheduled Report.*

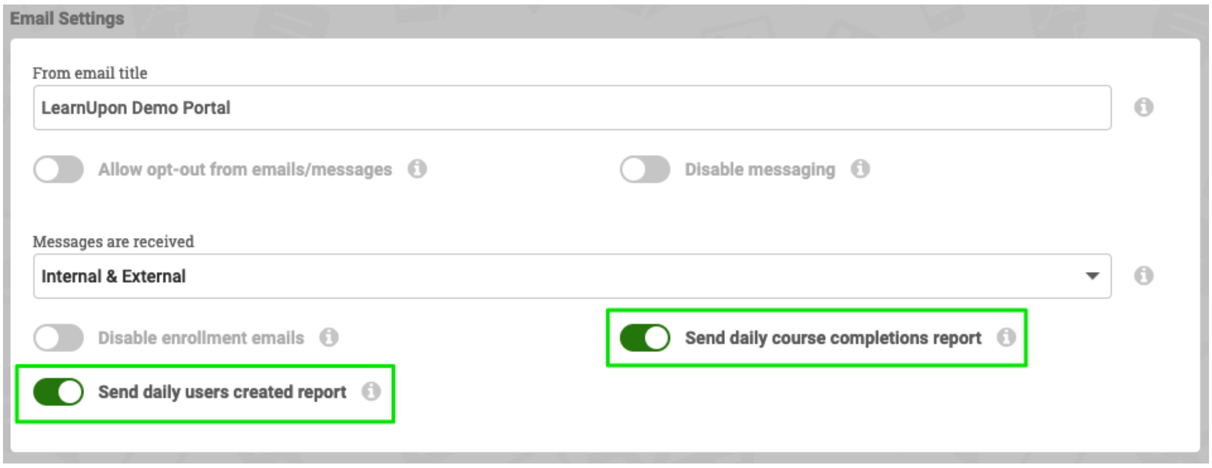


Finally, Administrators can also turn on two daily reports in Settings. These are:

- **Daily Completion Report** - a summary of all Course completions, including user details, Status, Scores etc.
- **Daily Users Created Report** - a summary of all users created in the past 24 hours (note - users created via Batch Upload will be excluded from this Report).

If enabled, all Administrators of your portal will receive these reports daily. To enable these daily Reports:

1. Select **Settings > Email > General Settings**
2. Toggle on/off the Reports you wish to enable
3. Click **Save**



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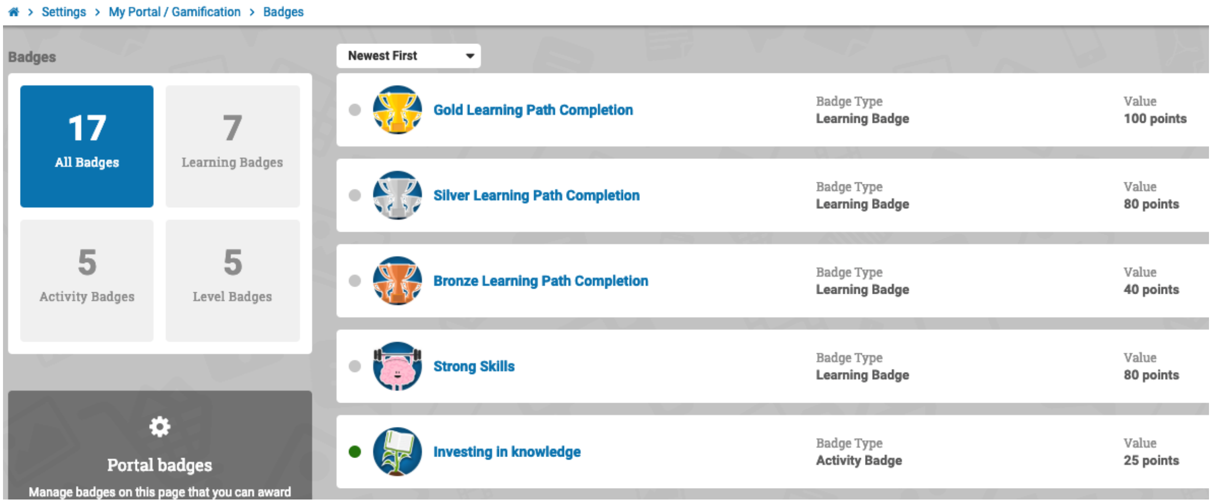
13. Gamification

Gamification encourages learner motivation and engagement. It awards badges and points to learners based on their activity within the portal; learners points will move them up levels within the game and view their performance relative to peers through Group or Portal Leaderboards.

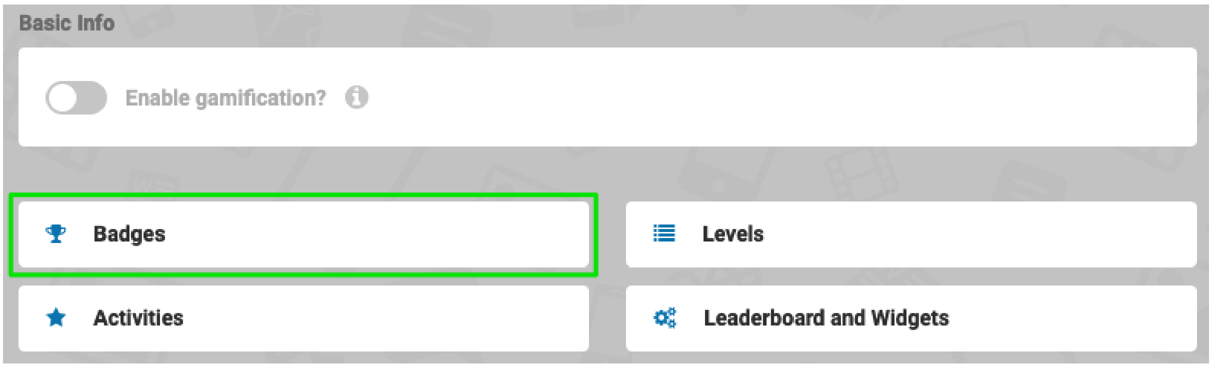


To access and enable Gamification settings, select **Settings > My Portal > Gamification**. It is recommended you customize the four Gamification settings (Badges, Levels, Activities, and Leaderboards and Widgets) prior to enabling Gamification in your Portal.

***Important**: As soon as you enable Gamification, it becomes 'live' across the Portal. First consider how you wish to use Gamification, and then customize settings prior to switching the **enable gamification** toggle on. If gamification is disabled, point values are frozen, not reset.*

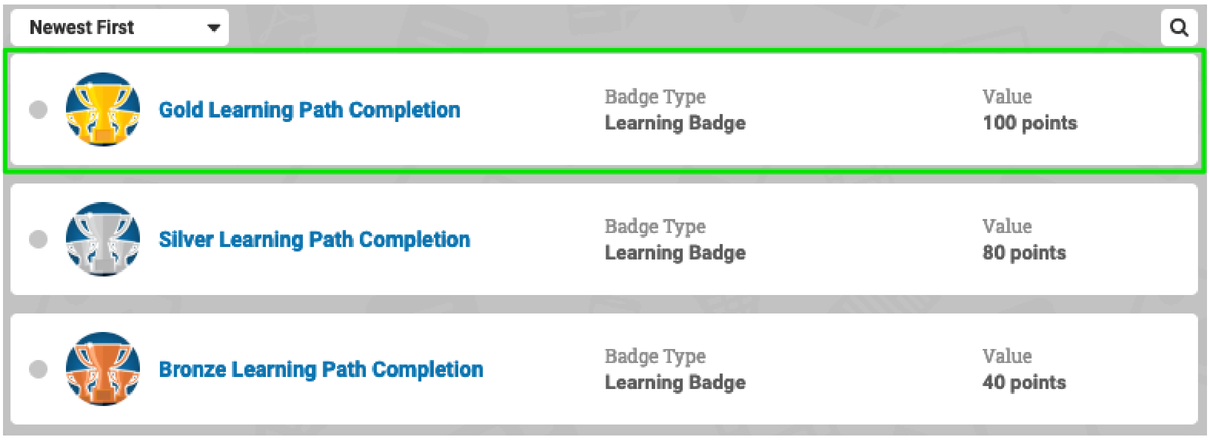
13.1 Badges

Badges are your starting point for customizing Gamification. Administrators can edit existing LearnUpon badges, create new badges, attach a points value to each badge, and customize the name and look of them.

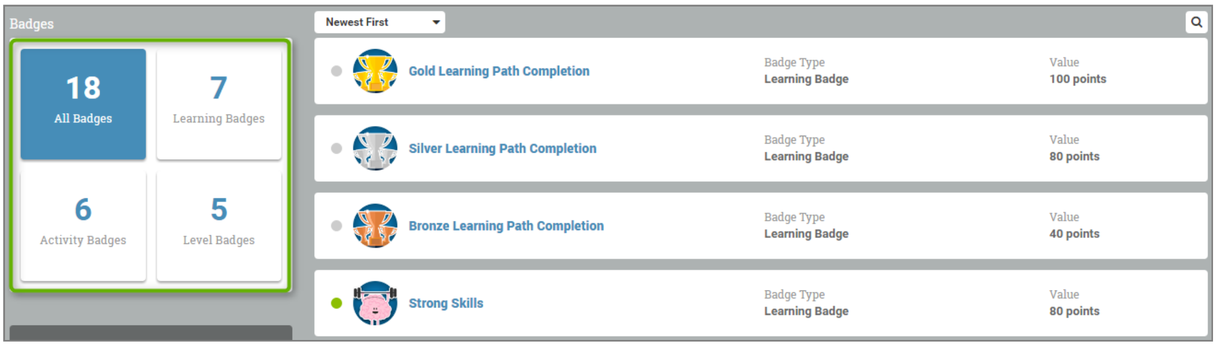


There are three set badge types within LearnUpon. These are:

- **Learning badges** - awarded to learners on completion of a Course or Learning Path.
- **Activity badges** - awarded to learners for completing specified activities.
- **Level badges** - awarded to learners for accumulating specified points amounts.



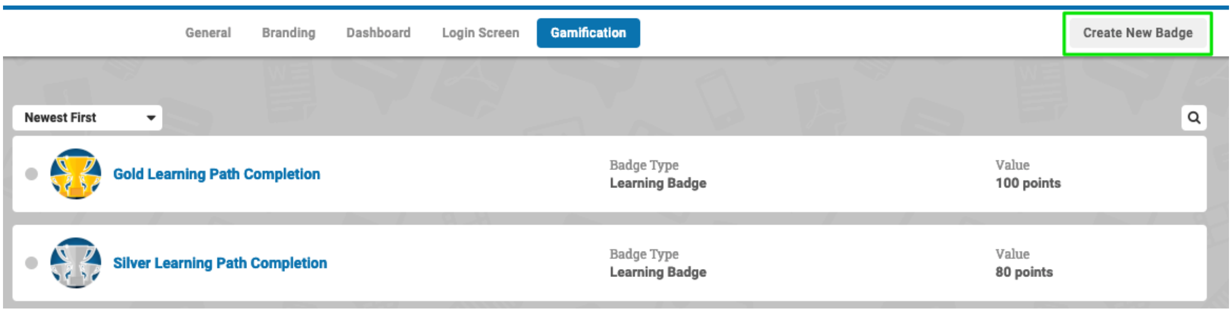
You can view all badges by clicking into **Dashboard > Settings > My Portal > Gamification > Badges**. Here you will see a filter panel for viewing the three set badge types :



All badges are customizable - after clicking into the badge, you can edit the badge name, upload a new badge image, and specify a points value for it.

To add a new badge:

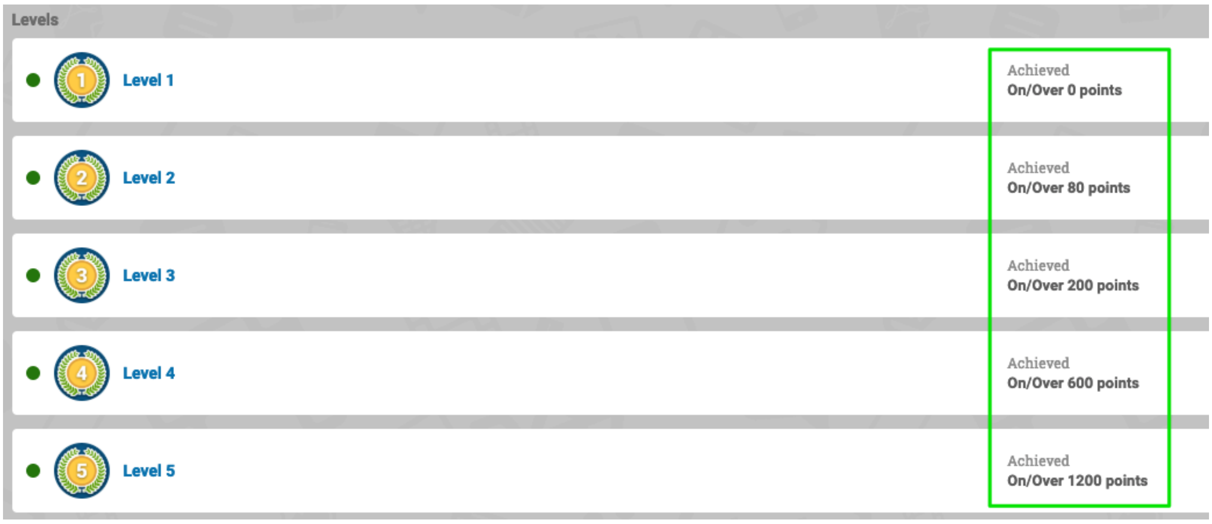
1. Select **Badges > Create New Badge**
2. Enter a name, type and points value for your badge and choose an existing badge image or upload a new one
3. Click **Add**



Your new badge is now created and is ready to be attached to an appropriate Course, Activity or Level (depending on the Badge Type).

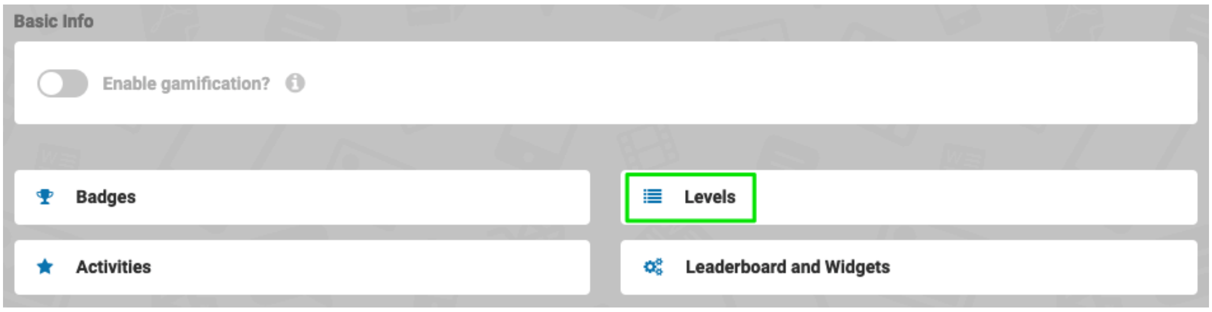
13.2 Levels

Every badge awarded carries a set number of points (customized by you). As learners complete courses and activities, their number of points accumulates. As their point total increases, learners can progress through five different levels of your game. You can set the points for each level, rename the levels, and enable/disable them as required. Once a learner achieves the fifth level, they will continue to acquire points associated with any actions taken on the system.



To edit a Level:

1. Select **Settings** > **My Portal** > **Gamification > Levels**
2. Click into the level you wish to edit
3. Enter a name, points total, and attach the associated badge
4. Enable/disable the levels as required.

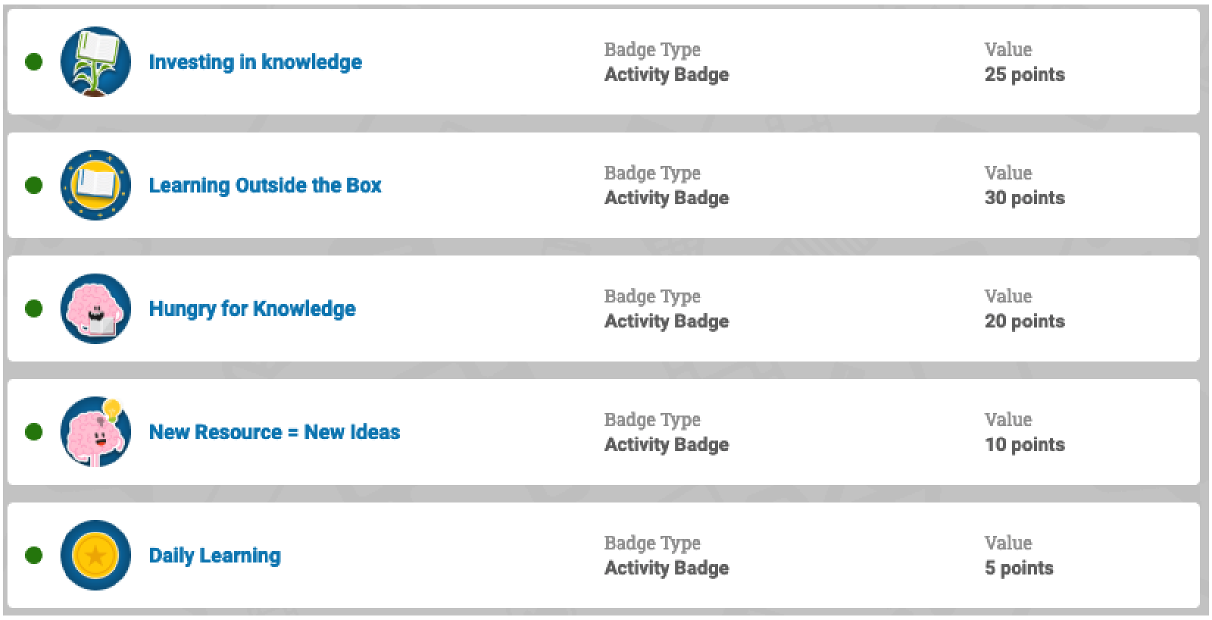


***Tip**: When deciding on points and level values, we recommend considering the number of courses a typical learner will take each month. This will guide your decision for the number of points needed to achieve each level. Create level point-values slightly higher than expected learner activity with a greater point spread the higher the level. Also, instead of Levels 1 to 5, why not be creative and rename them "Novice" to "Master" or "Padawan" to "Jedi"!*

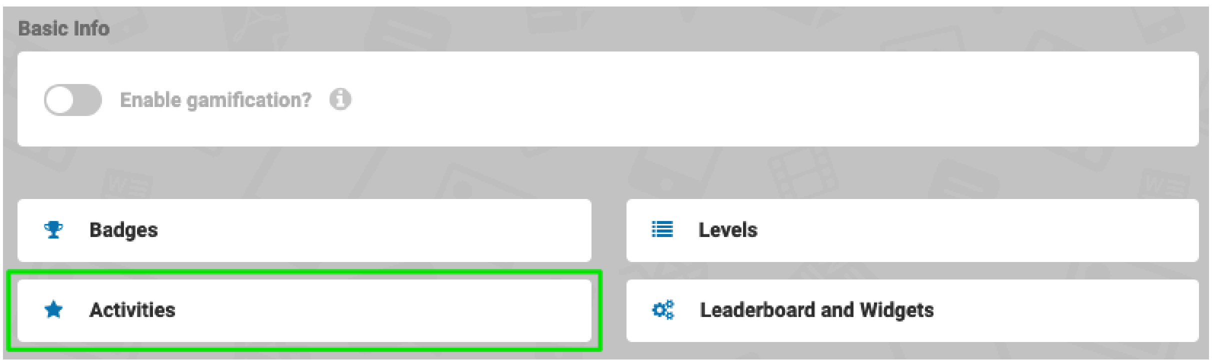
13.3 Activities

There are five preset activities that a learner can undertake to achieve an Activity Badge in LearnUpon.

- **Investing in Knowledge** - awarded when a learner purchases a Course from your Storefront (visible on Storefront-enabled Portals only).
- **Learning Outside the Box** - awarded for an item of external training approved by the learner's instructor (visible on Association-enabled Portals only).
- **Hungry for Knowledge** - awarded when a learner self-enrolls on a Course through your Catalog.
- **New Resource = New Ideas** - awarded when a learner views or downloads a Resource (up to one a day).
- **Daily Learning** - awarded when a learner starts or resumes a Course (up to one a day).



To view your Activities and determine the badges that each activity will be awarded, select **Settings > My Portal > Gamification > Activities.**

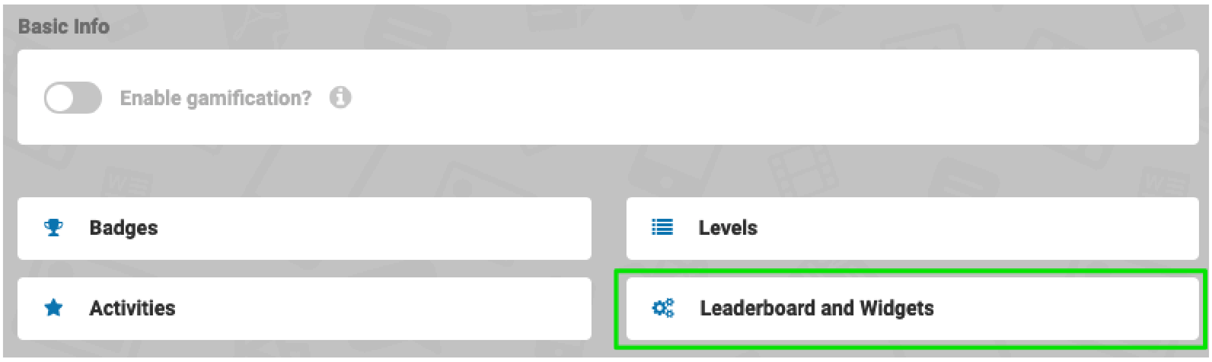


Here, you will see the activities available in your portal. By clicking into each activity, you can determine whether that activity is active or not. If, for example, you do not want to award a badge to learners for logging into the Portal each day, simply disable the **Daily Learning** badge. If you would like to change the name, points value or image associated with an Activity Badge, remember you can edit your Activity Badges within the Badges section.

13.4 Leaderboards and Widgets

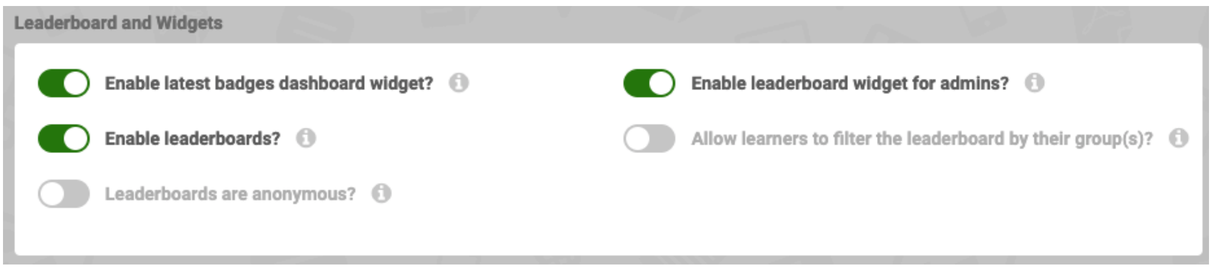
Leaderboards are a great way of fostering friendly competition among learners. If enabled, learners can track their overall performance relative to other learners within your Portal and the Groups of which they are a member.

To enable leaderboards, first click into the **Leaderboards and Widgets** card:



Here, you will find the following options:

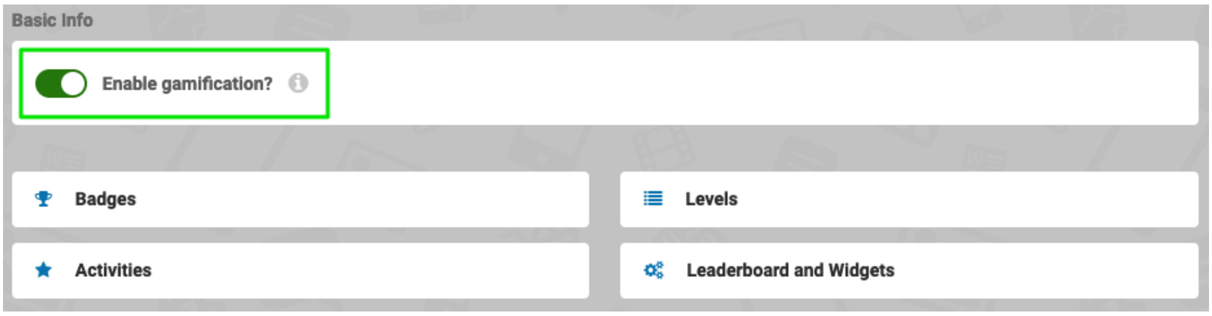
- **Enable latest badges dashboard widget?** - this will enable a small widget to appear on the learner's **My Courses** page displaying the latest badges acquired.
- **Enable leaderboards** - enables portal-wide leaderboards, which all learners can access via their **My Achievements** page.
- **Leaderboards are anonymous** - Enabling this will show all other users as "Anonymous" on leaderboards rather than displaying their name.
- **Enable leaderboard widget for admins?** - Enabling this will display a widget on the Admin Dashboard that displays the Portal leaderboard.
- **Allow learners to filter the leaderboard by their group(s)** - enabling this enables learners to filter their Leaderboard by the Groups of which they are a member.



Congratulations - you are now ready to enable Gamification!

13.5 Enabling Gamification

Once you have reviewed and customized your Badges, Levels, Activities, and Leaderboard and Widget options; you are ready to enable Gamification. Select **Settings > My Portal > Gamification > Enable Gamification > Save.**

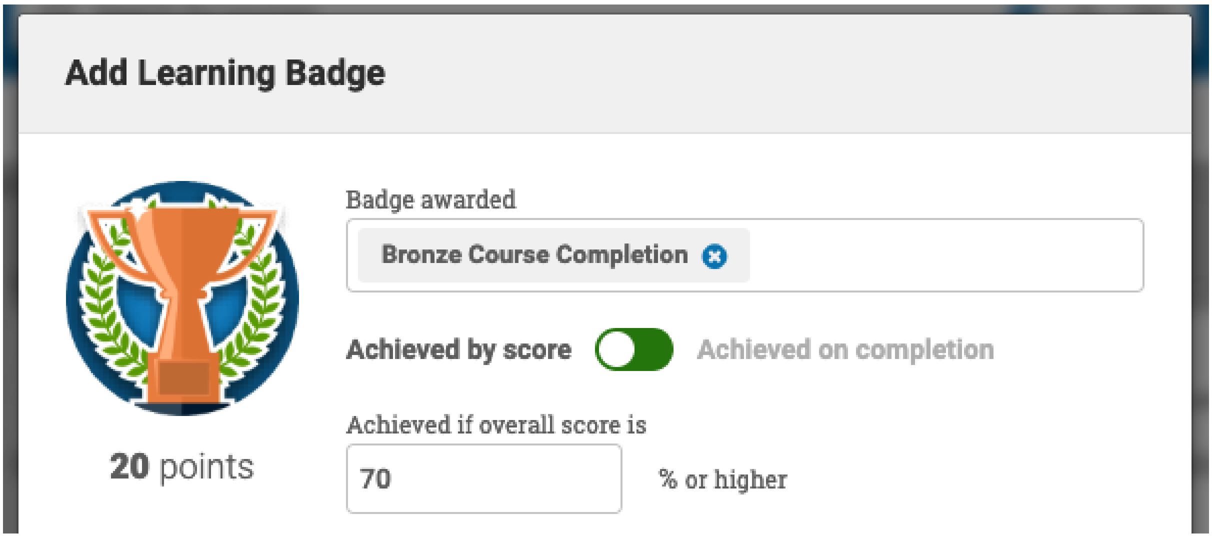


Attaching a Badge to a Course

Next begin attaching Learning Badges to your Courses and Learning Paths. To attach a Learning Badge to a course:

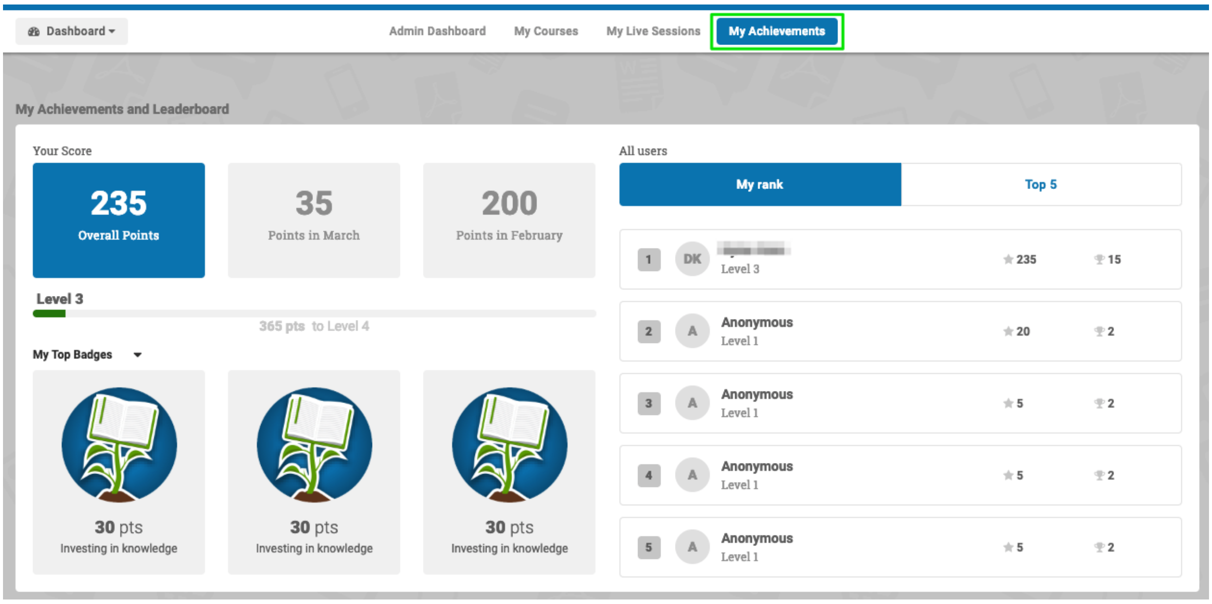
1. Select **Courses > Course Name > Learning Badges > Add Learning Badge**
2. Select the **Badge Awarded > Achieved By** > **Save**

Tip: *You can add up to five badges to one Course or Learning Path. When adding a badge to a Course with an Exam, you can specify for the badge to be awarded on completion, or on achieving an overall score. For example, you may choose to award a Silver Badge to learners who achieve an 80% and a Gold Badge to Learners who achieve 90% or above when completing the Course*



Learner's 'My Achievements' Page

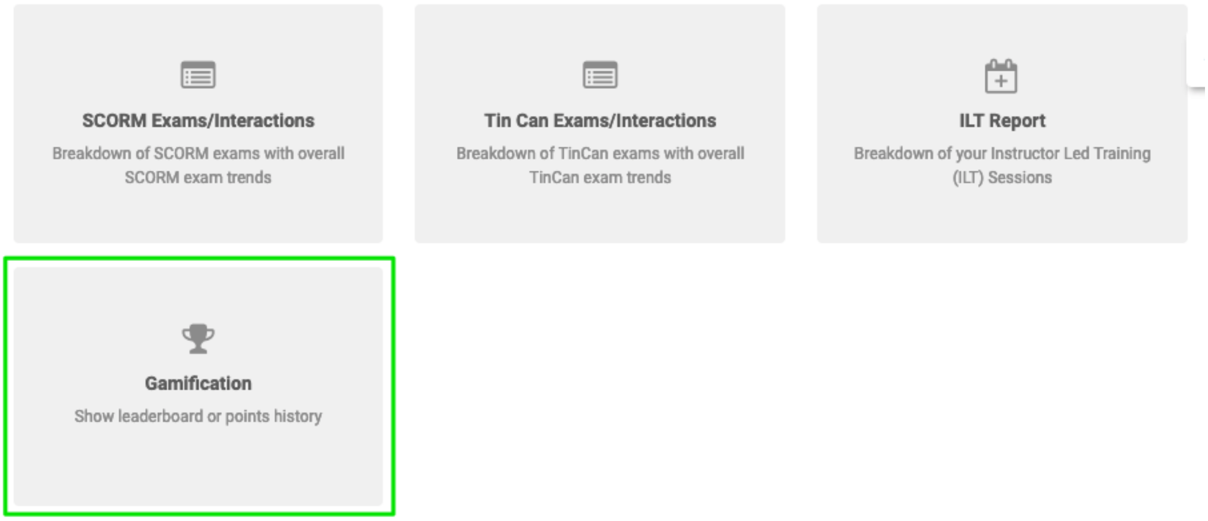
Once Gamification is enabled, all learners will see an additional tab called **My Achievements** on their secondary navigation menu:



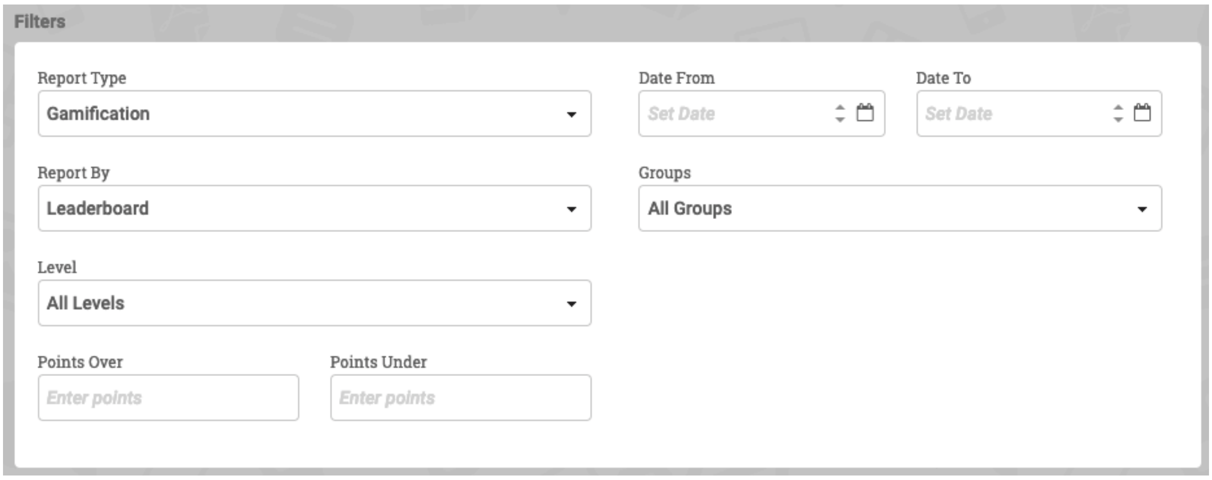
Here, the learner can view their accumulated points total, badges attained, points required to reach the next level etc. If Leaderboards are enabled, the learner can compare their performance against other learners across your Portal and within their Groups.

13.6 Gamification Report

Alongside the Leaderboard widget for Admins, to view gamification related data in your Portal, run a Gamification Report. Due to the amount of data returned, the Gamification Report can only be exported to Excel in six month increments of time.
To run a Gamification Report select **Reports > Gamification > Export to Excel.**



The report can be filtered Group, Date, Level, No. Points and/or Leaderboard or Achievement History :



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14. Additional Features

LearnUpon is always working on improving and expanding to meet additional needs. Review new features and get suggestions for adoption on your Quarterly Checkin calls with your Customer Success Manager

14.1 Selling Your Courses - eCommerce Storefront

Customize and enable a Storefront on your LearnUpon portal to advertise published courses/ learning paths/ ILTs for sale to the public, sold through PayPal or Stripe.

Setting up and customizing your Storefront is quick, easy and non-technical. For full information on how to do so, please log in to your portal and visit our eCommerce Guide.

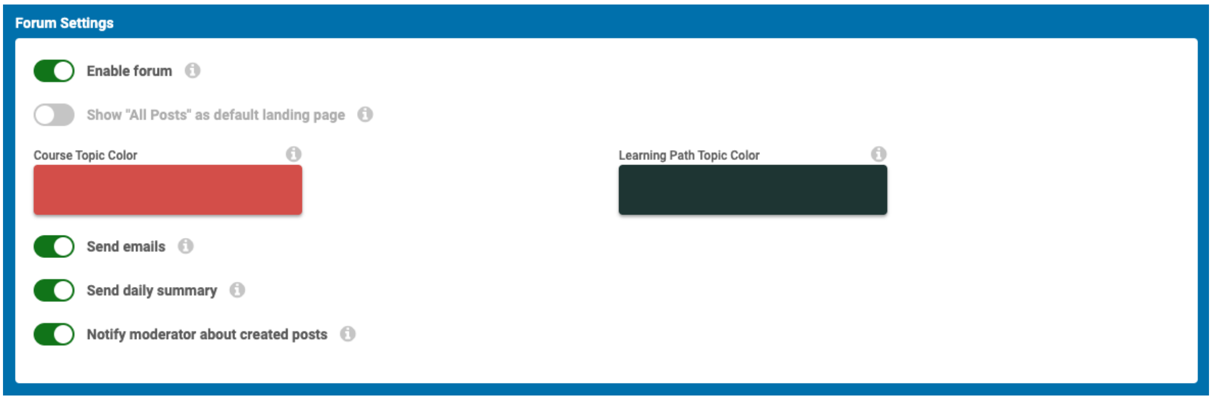
> ***Note:*** *E-Commerce Storefronts are only available on specific plans. If you are interested in upgrading to utilize E-Commerce, please contact your Customer Success Specialist or email success@learnupon.com.*

14.2 Forums

Empower users to create conversations, engage with one another, and respond to learning topics in a course or learning path's discussion forum. Have subject matter experts and need a place for them to share information? Create a forum topic for their area of expertise and make them a moderator.

To enable forums:

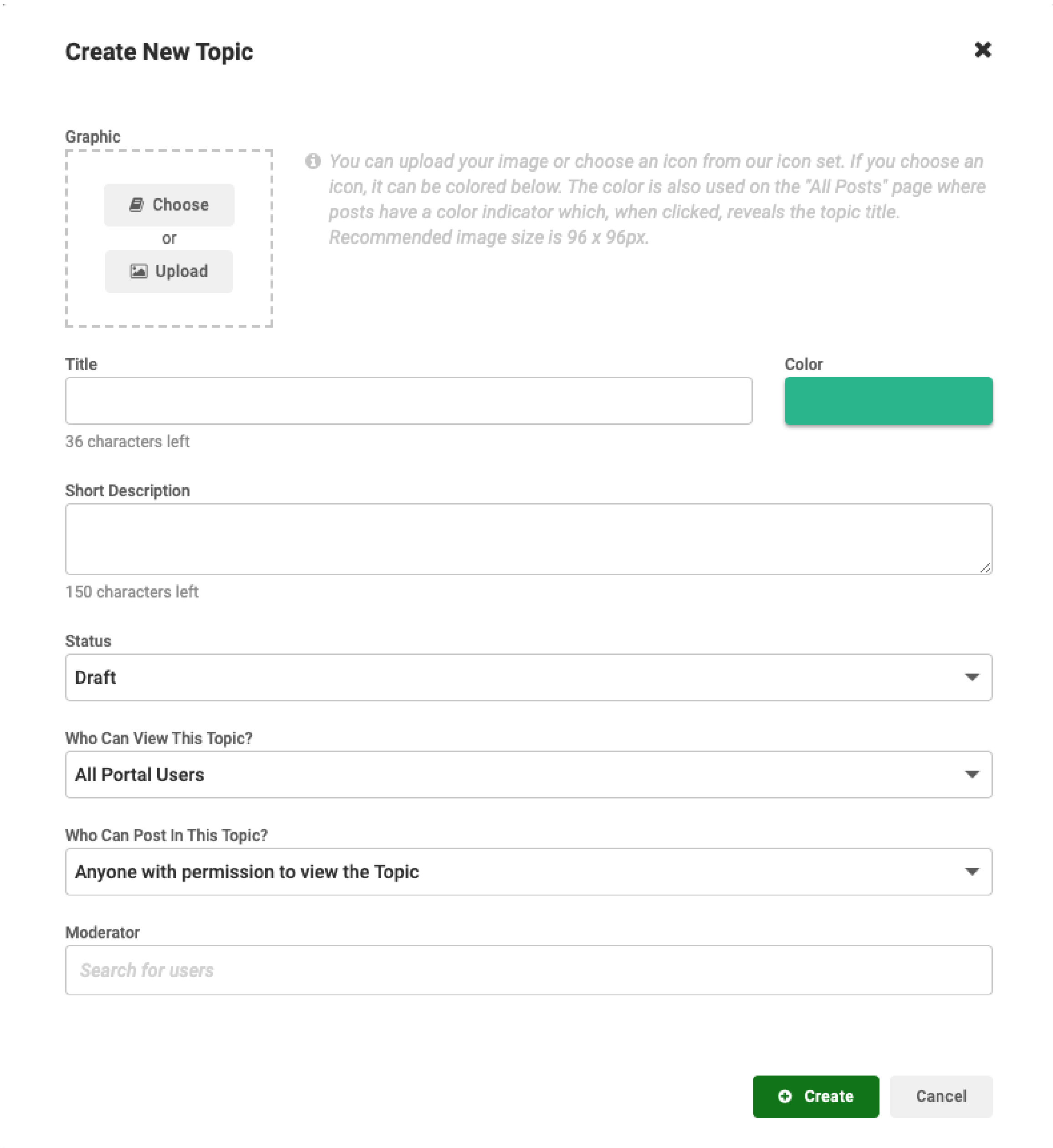
1. Navigate to **Settings > My Portal > General Settings**
2. Under **Forum Settings** Opt to **Enable Forum**
    a. This feature is plan specific. If this setting does not exist, please contact your dedicated Success Team member to enable this feature if available
3. Enable **Show All Posts as default landing page** to change the Forum's landing page from all topic tiles, to all post tiles.
4. Select the color wheel to identify the badge color on Forums for Course and Learning Paths.
5. Disable **Send Emails** to prevent forum notifications via email all together
6. If **Send Emails** is enabled, **Send daily summary** can be enabled to send system admins a summary of posts made in forums the day before. **Notify moderator about created posts** can be enabled to send emails to moderators each time a post is made within the moderator's topic.



Create Forum Topics

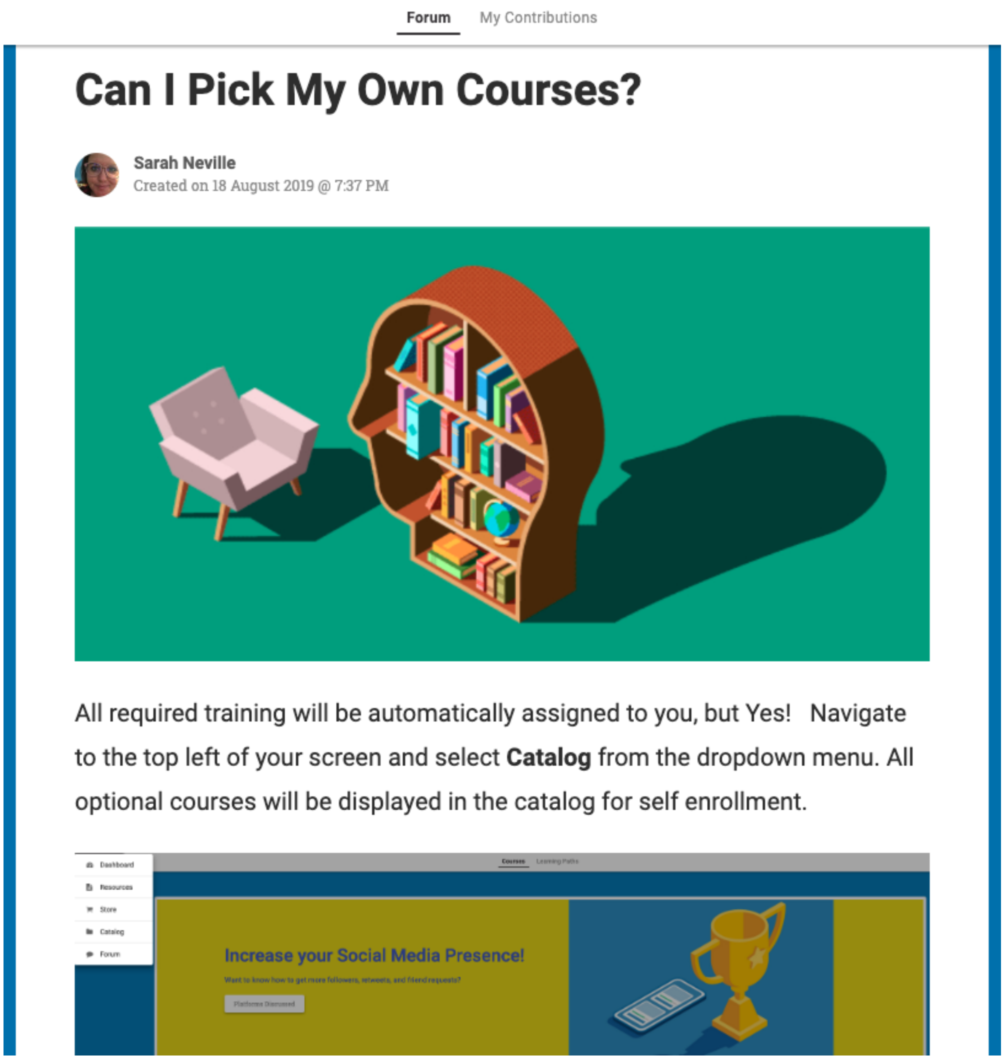
1. Navigate to **Forums** from the main navigation menu
2. Select **Create New Topic**
3. **Choose** or **Upload** the graphic that will display on the Topic's Tile
4. Enter the **Title** and select the tile badge's **color**
5. Enter the **Short Description** to display on the topic's tile

6. Select if the Post is a **Draft** or should be **Published**
7. Identify if **All Portal Users** can view the topic or **Restrict by Group** and enter the group(s) that should have access.
8. Identify if **Anyone with permission to view the topic** can post, or if **Only Admins and Moderators**
9. Enter the names of any LearnUpon user(s) as Topic Moderator(s)
10. **Save**



Create Forum Posts

1. From within a Forum Topic, select **Create New Posts**
2. Enter the **Post Title**
3. If desired, **Upload Image** to display on the post's tile
4. Enter **tags** that learners should be able to find your post with
5. Post text content, images, embedded media
6. Select **Publish** to make public or **Save** to keep as draft.



14.3 White-Labeling

White-Labeling allows for the removal of LearnUpon references, within the URL, portal footer, and via system generated emails. Rather than emails being sent from notifications@learnupon.com they can be sent from whateveryouwant@yourcompany.com.

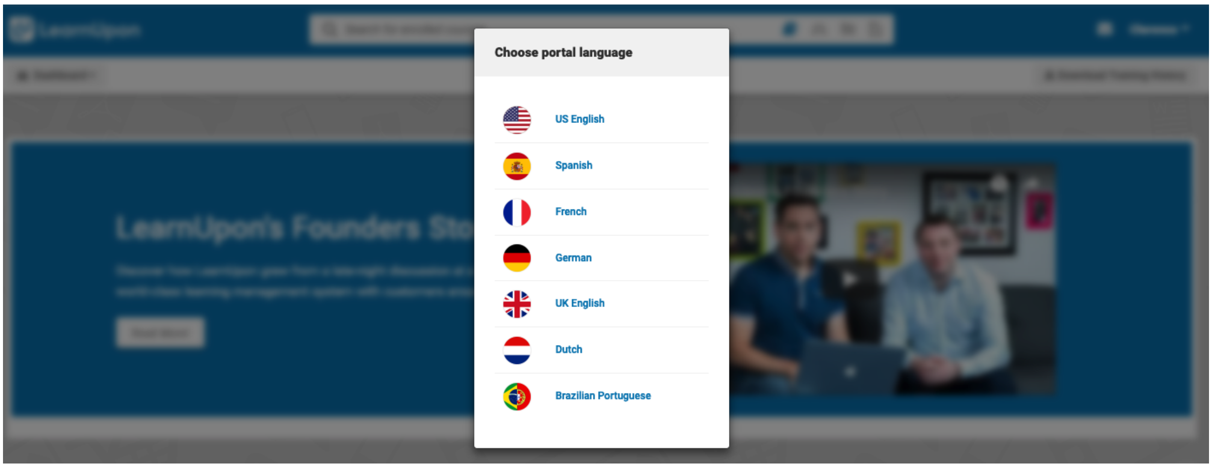
This feature is particularly useful to customers wishing to brand a portal as their own to create, sell, or manage client portals for third party clients. For full information on how to white-label, once logged in to your portal visit our [Knowledge Base article](#).

Note: *White-Labeling is only available on particular plans. If you are interested in upgrading to utilize White-labeling, please contact your dedicated Customer Success Specialist or email success@learnupon.com.*

14.4 Multiple Languages

LearnUpon is currently available in the following languages:

- US English
- UK English
- Spanish
- French
- German
- Dutch
- Brazilian Portuguese
- Italian
- Russian
- Polish
- Japanese
- Chinese (simplified)



Multiple Languages is particularly useful to our multinational customers and those selling into foreign markets. Learners can specify their preferred language and, if using multiple Client Portals, each Portal can be set to its own default language.

Note: *Multiple Languages are only available on particular plans. If you are interested in upgrading to utilize Multiple Languages, please contact your dedicated Customer Success Specialist or email success@learnupon.com.*

14.5 Salesforce Integration

LearnUpon enables you to integrate your Portal with Salesforce. You can simply install our app on your Salesforce Org and then link this to your Learning portal. With single-sign-on, learning data tracking in real-time and custom reports all within Salesforce, your learners will never have to leave Salesforce to access their training.

If you wish to learn more about Salesforce integration options, please visit the LearnUpon Knowledge Base or contact your Customer Success Specialist.

Note: *Salesforce Integration is only available on particular plans. If you are interested in upgrading to integrate with Salesforce, please contact your dedicated Customer Success Specialist or email* success@learnupon.com.

14.6 Chat Integration

Specific plans enable you to integrate a ZenDesk Chat on your portal for live chat support with portal users. If you wish to offer real-time support via chat and want to learn more about Chat Integrations, please visit the LearnUpon Knowledge Base or contact your Customer Success Specialist.

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15. The LearnUpon Knowledge Base

To access the Knowledge Base:

1. Log in to your main Portal
2. Click the **?** icon in the top right of your screen
3. Click the **LearnUpon Knowledge Base**
4. Select the subject tile or start searching to discover videos, guides, and how-to articles