Administrator's Manual

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Introduction

How do you improve performance, reduce costs and strengthen compliance? Give your team the knowledge they need to excel at their jobs. Training is perhaps the greatest source of untapped value and competitive advantage available to any organization. Training however can be expensive, complicated and frustrating. When arranging training, your organization can come up against all manner of logistical difficulties, which can cost both time and money. With training budgets shrinking and expectations, rising, finding cost effective yet feature-rich solutions should be your objective.

eLeaP eliminates any such problems. The eLeaP learning management system takes the headache out of organizing training, as well as enabling your organization to make big financial savings. eLeaP gives you exactly you need, at a price that you can afford, and with a level of support and accessibility unparalleled in this industry.

The eLeaP LMS system empowers you to rapidly and easily create intuitive online learning courses from your own existing files. No more dependence on inadequate and off-topic pre-existing training courses; with eLeaP you can create the precise training materials that fit your needs.

With eLeaP online learning software, you can incorporate PowerPoint, PDF, pictures, audio, video, Microsoft Office, SCORM and many more file types into your own personalized courses. Or if you find that your busy schedule leaves you unable to find the time to create your courses, you can even send us the files, and we'll use our vast course creation experience to build courses for you to your specifications.

The eLeaP learning management system can save you a vast amount of both time and money, while enabling you to create sophisticated training packages custom-built for the precise needs of your organization.

The purpose of this document is to describe all of the functionality within the eLeaP system that an administrator has access to and how the administrator can easily configure this functionality to have the system up and running quickly and efficiently.

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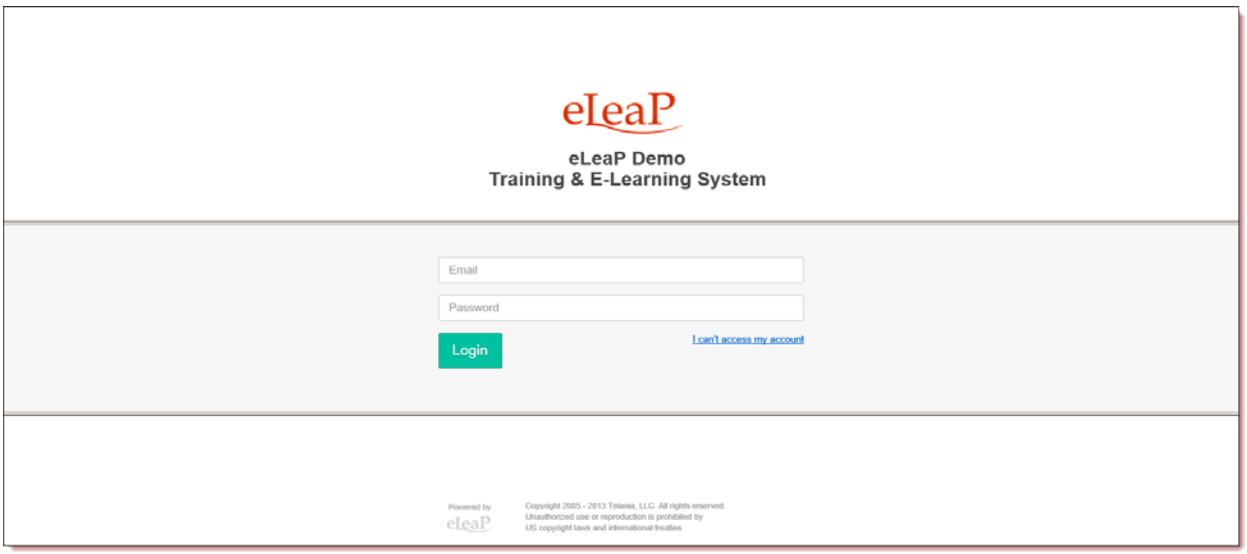
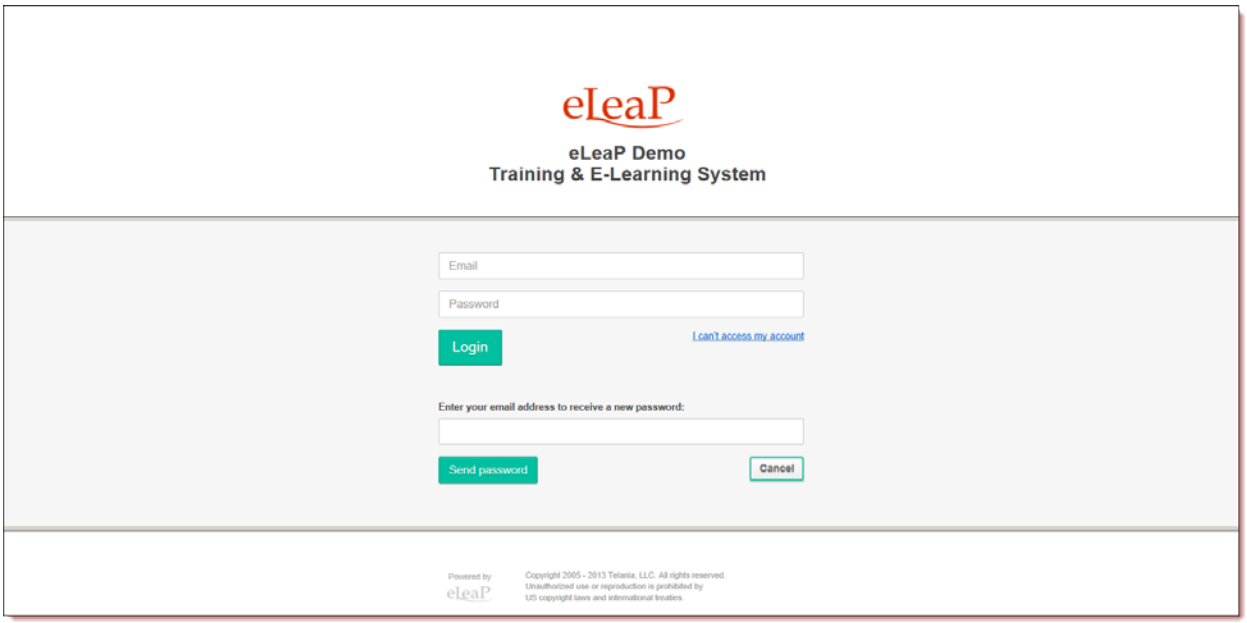
Logging in to the System

Entering the URL for the eLeaP application (your specific account URL) into your browser's address bar displays the **Login** screen, illustrated below. Simply enter your email address within the **Name** field, enter your password in the **Password** field, and then click Login to access the system. If you get an error message or [THIS ACCOUNT HAS BEEN DISABLED] message, check your account website URL to make sure it is correct. Contact eLeaP if necessary.



Click the **I can't access my account** link if you forget your password. The **Login** screen expands, displaying a field into which you can enter your email address for retrieval of your password. Once you have entered your password, click Send password. The system will send you your password.



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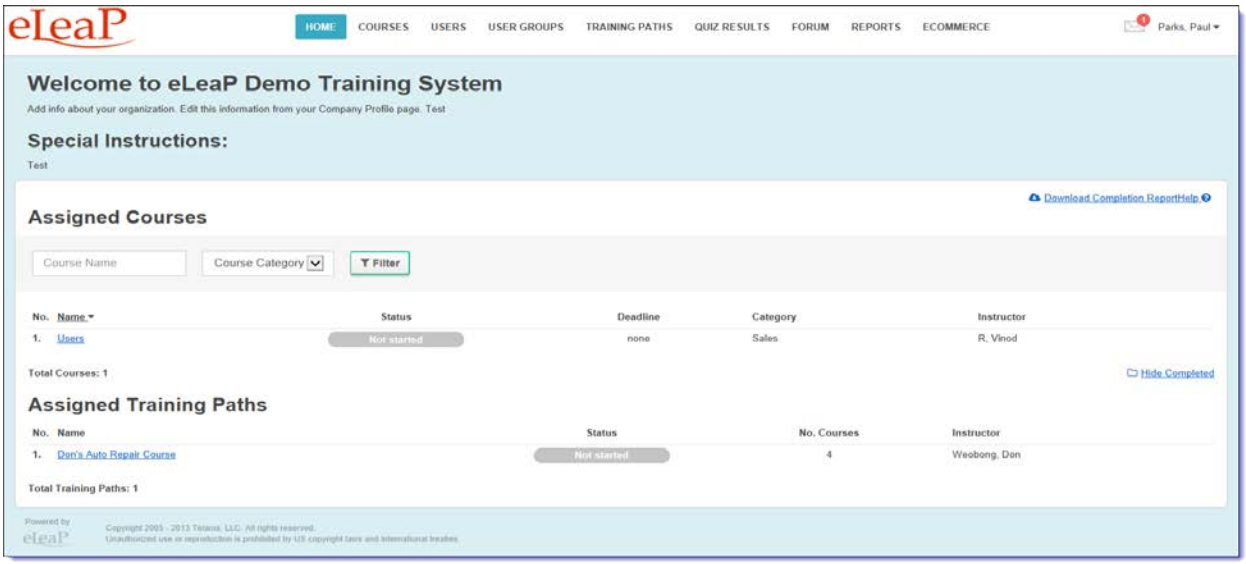
Welcome Screen

The **Welcome** screen, illustrated below, is the first screen you will see each time that you log in to the system. Each Assigned Course that you create will be displayed on an **Assigned Course** list, and you can filter which courses are displayed by selecting a Category from the **Category** list and clicking

. You can also select the **Download Completion Report** link to download all of the Assigned Courses that have been completed. Additionally, you can click the **Hide Completed** link in order to display only those Courses that have not been completed at the current time. Each Assigned Training Path that you create will be displayed on an **Assigned Training Paths** list. Click the [**Help**] icon for additional information.



eLeaP™ Inbox

With eLeaP™ LMS, you have a comprehensive notification and electronic communications system which enables you to set up rules for auto notifications to be sent to your users.

As System Administrator, you can also access your eLeaP™ INBOX to receive updated email notification and communications regarding various activities in your eLeaP account. You can receive Quiz completion notifications, notifications on Course Assignments, Pending Deadline notifications. In short eLeaP™ has developed the tools needed to enable and empower you to do your job in a more effective way. Now you have 360 degree overview and control over all aspects of your e-learning and employee training programs.

When you receive a Notification Email, the **Email** icon to the left of your User Name will indicate that. As shown in the following illustration, clicking on that icon displays the messages in your Inbox. You can select a message's and click the **remove selected messages** link to delete those Emails. Inbox messages are automatically deleted after thirty (30) days. Remember that notification emails also do get sent to your regular email.

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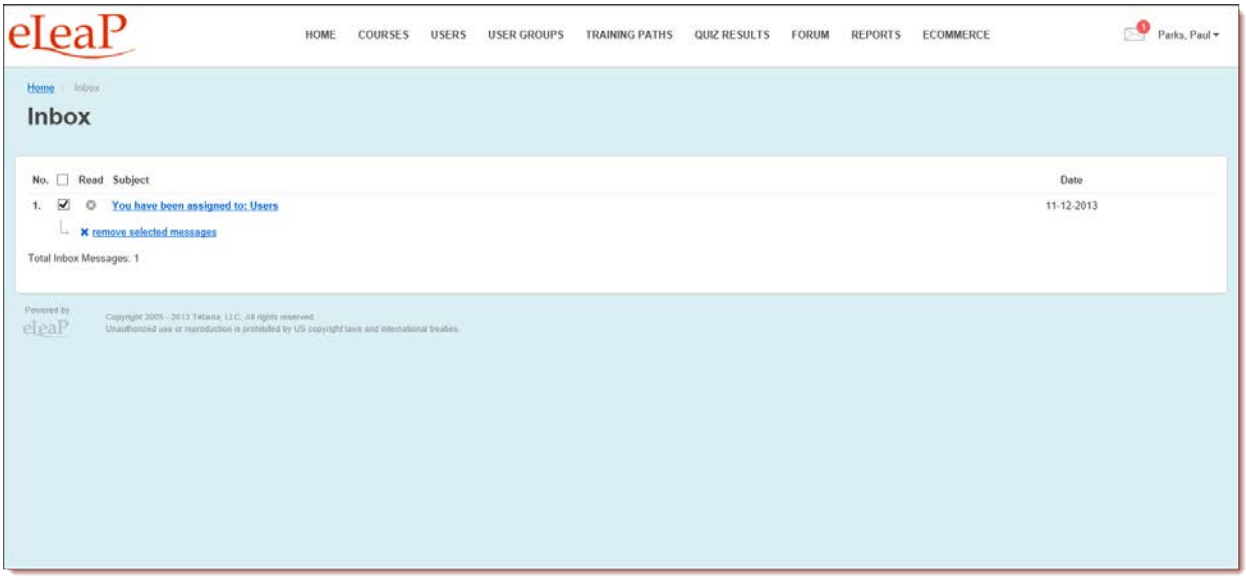
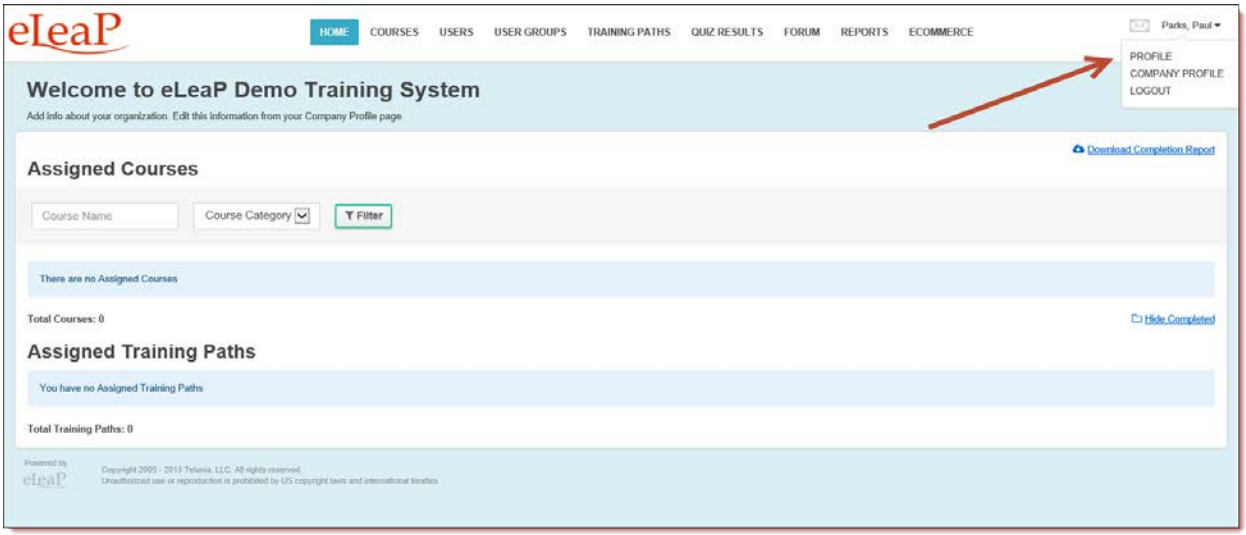


Modifying Your Personal Profile

Selecting the **PROFILE** option on the drop-down menu at the upper right-hand corner of the screen, as shown in the following illustration, allows you to modify your Personal Profile information.



The **User Profile** screen, illustrated below, is displayed. To associate a picture with your Profile, click the **upload picture** link in the upper right-hand corner of the screen, as shown in the illustration.

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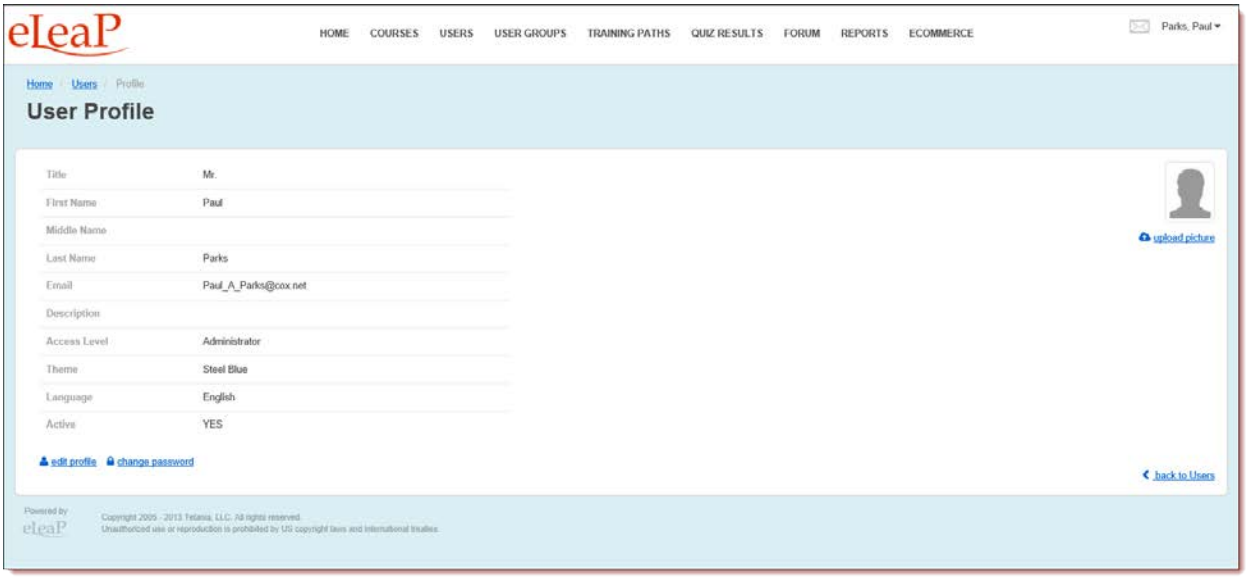
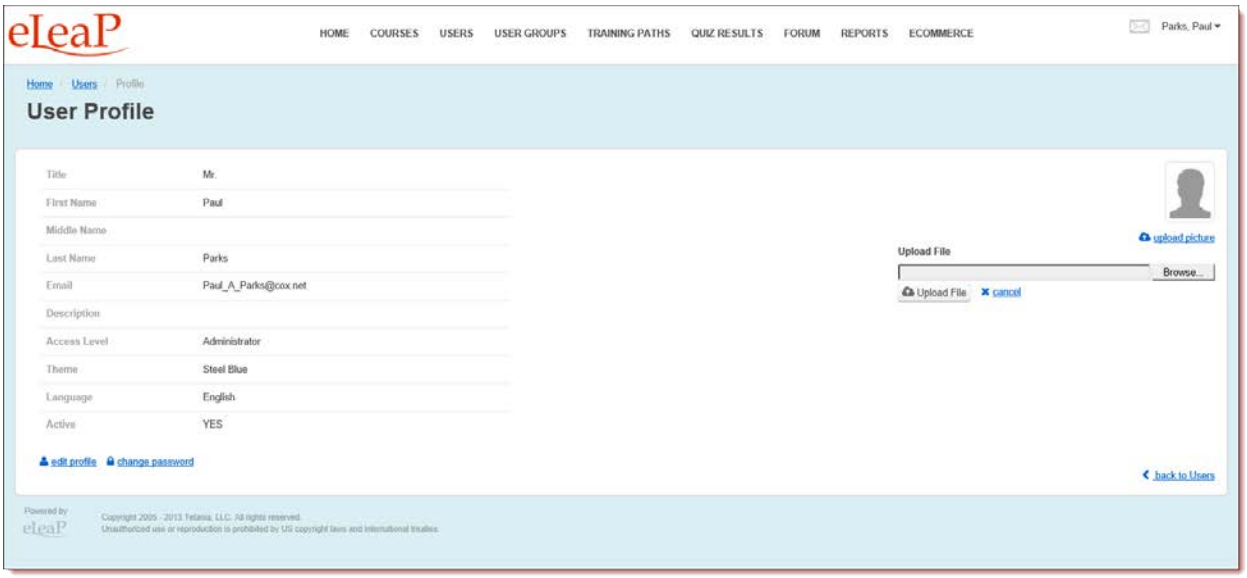


The screen expands, allowing you to navigate to a location on your computer where the picture that you want to associate with your Profile is stored by clicking Browse....



A **Choose File to Upload** dialog, illustrated below, is displayed. Select the file that you would like to associate with your profile and click Open.

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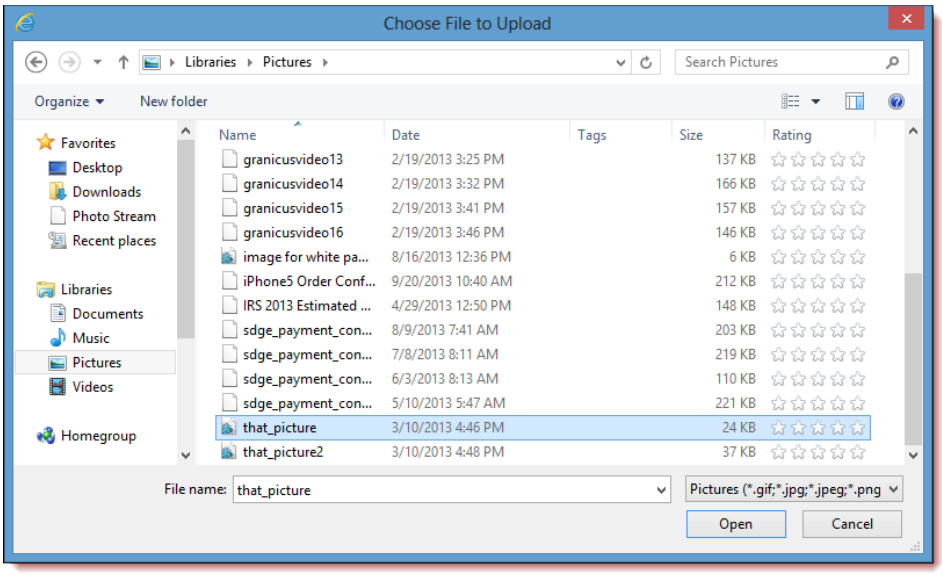
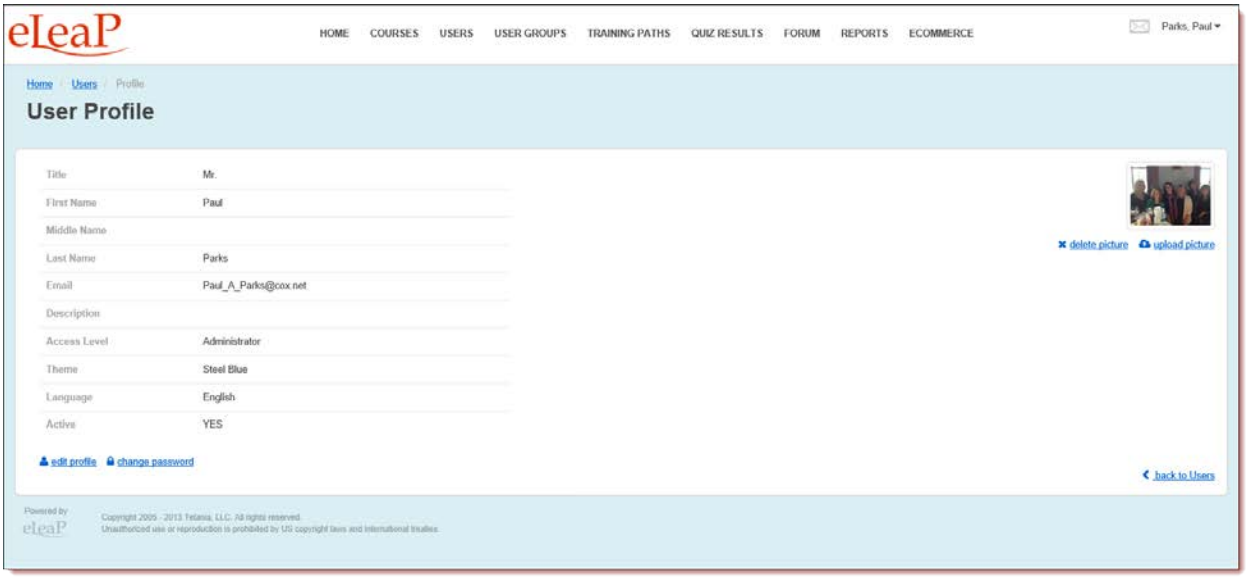


As shown in the following illustration, the image file is added to your Profile.



To edit your Profile Details, select the **edit profile** link located in the bottom left-hand corner of the screen. The **Edit User Profile** screen, illustrated below, is displayed. Make any modifications necessary within the **Title**, **First Name**, **Middle Name**, **Email**, **Description**, **Access Level**, **Language** and **Active/Inactive** settings.

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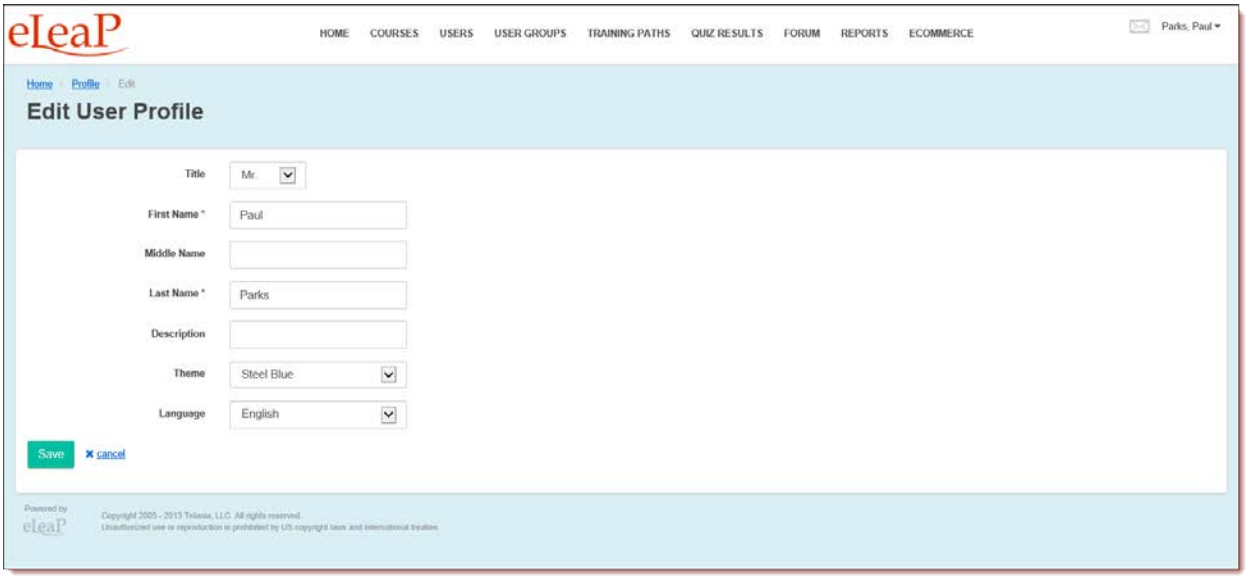
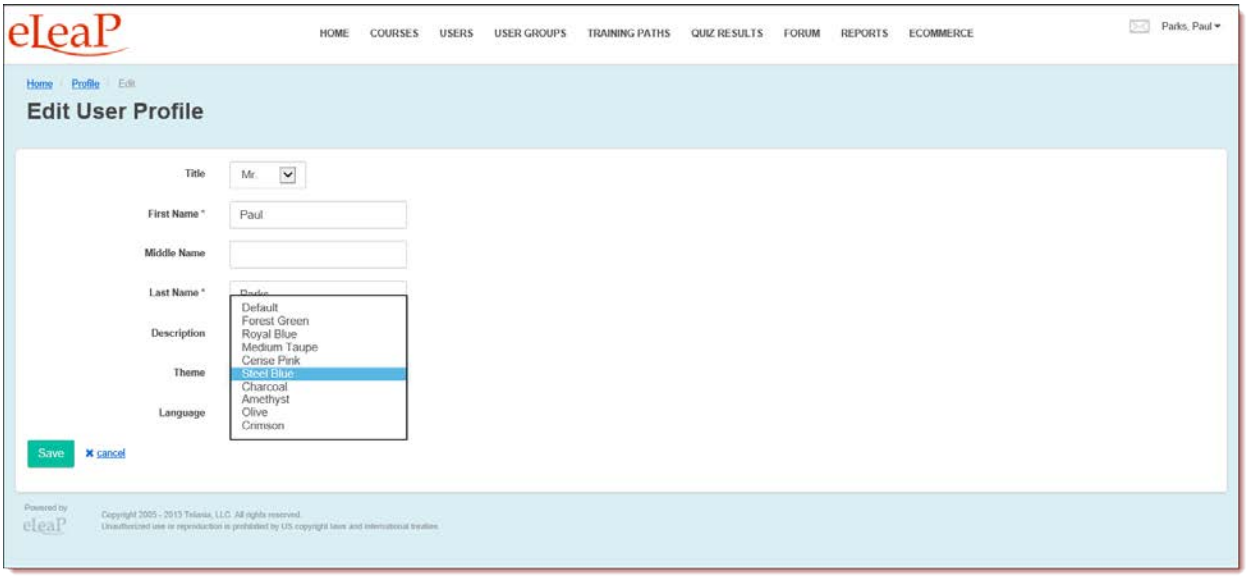


Additionally, you make a selection from the **Theme** drop-down, if desired, as shown in the following illustration.



Click

to save any changes to the system. As shown in the following illustration, the changes to your profile have been saved.

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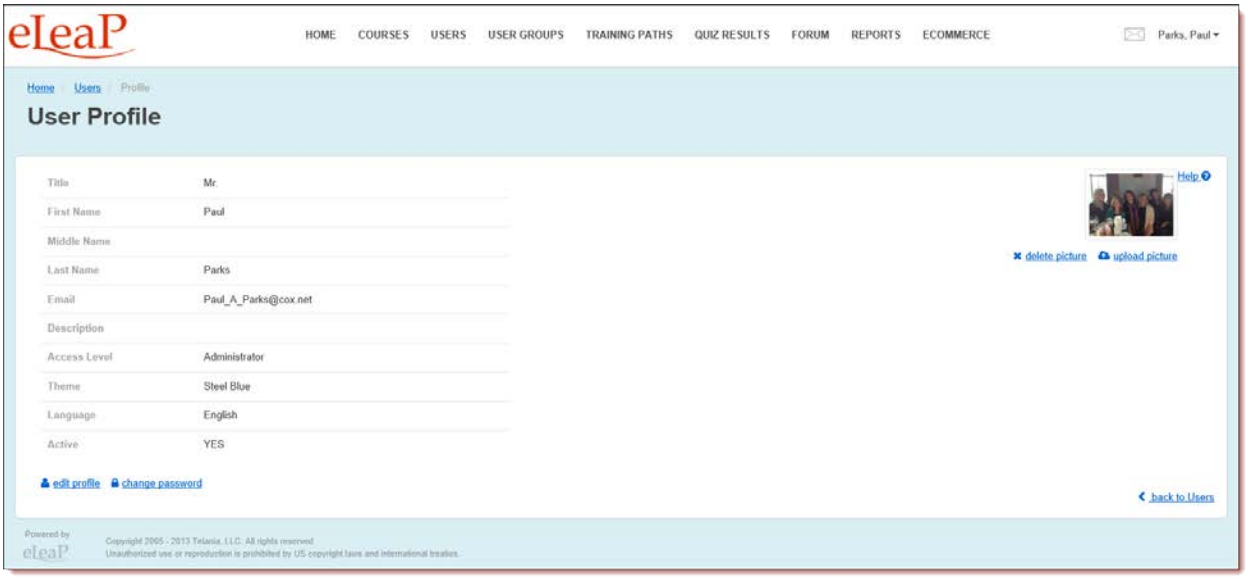
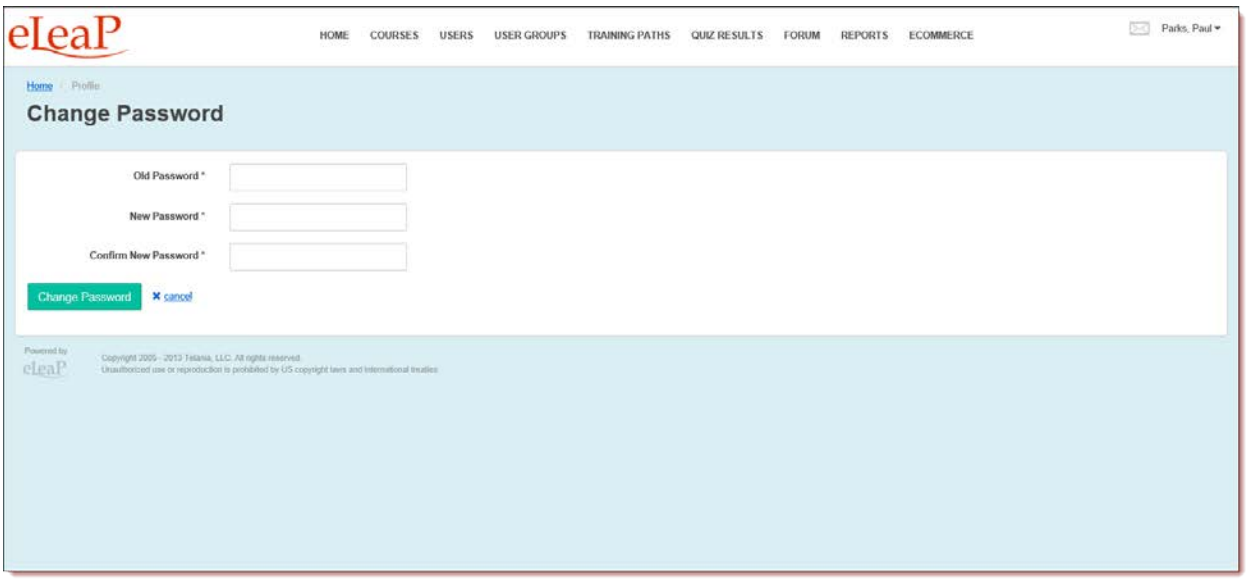


Changing Your Password

Clicking the **change password** link allows you to reset your password. As shown in the following illustration, the **Change Password** screen is displayed. Enter your old password in the **Old Password** field, enter your new password in the **New Password** field, re-enter the new password in the **Confirm New Password** field, and then click Change Password.



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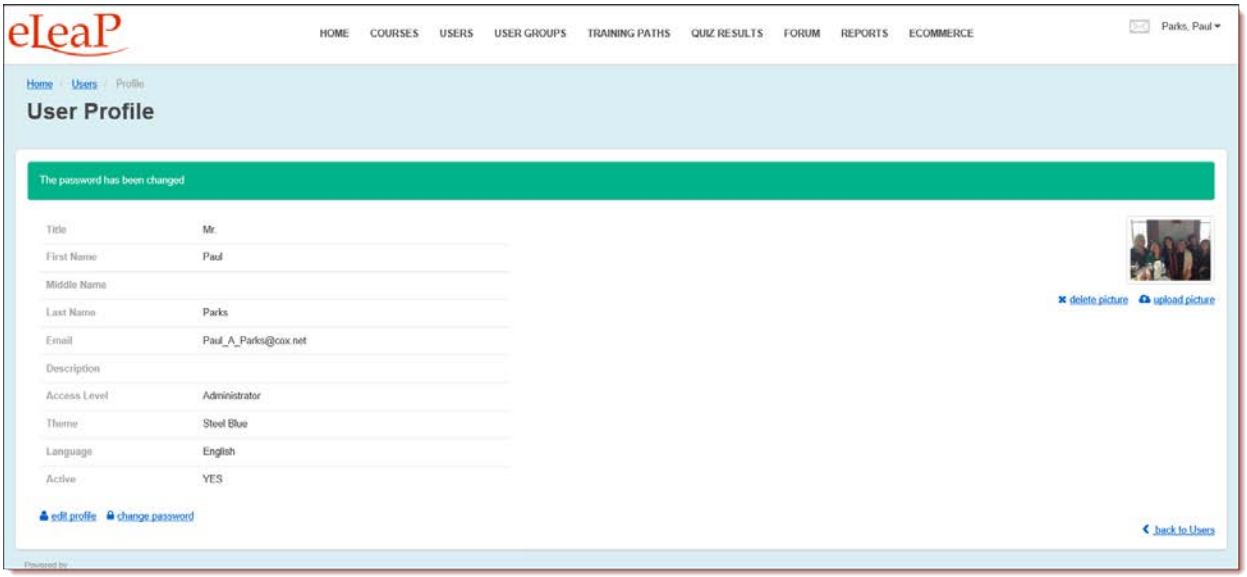
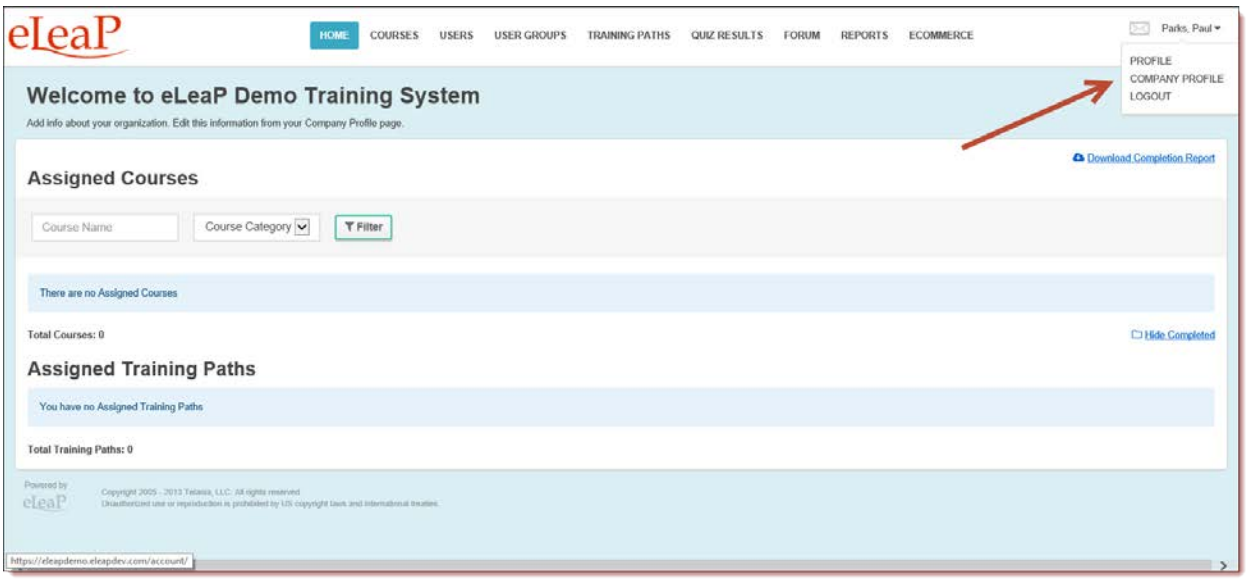
As shown in the following illustration, the system confirms that the password has been changed.



Modifying Your Company Profile

Selecting the **COMPANY PROFILE** option on the drop-down menu at the upper right-hand corner of the screen, as shown in the following illustration, allows you to modify your Company Profile information.



The **Company Profile** screen, illustrated below, is displayed. This screen consists of four tabs: **Company Profile** (displayed by default), **Billing**, **Receipts** and **API**. Clicking the **edit profile** link, located in the bottom left-hand corner of the screen allows you to modify the **Company Info**, **Instructions**, **Theme**, **Notification email**, **Language** and **Date format** settings for your account. Clicking the **Upload logo** link allows you to upload your company's logo, which will be displayed within the upper left-hand corner of the screen.

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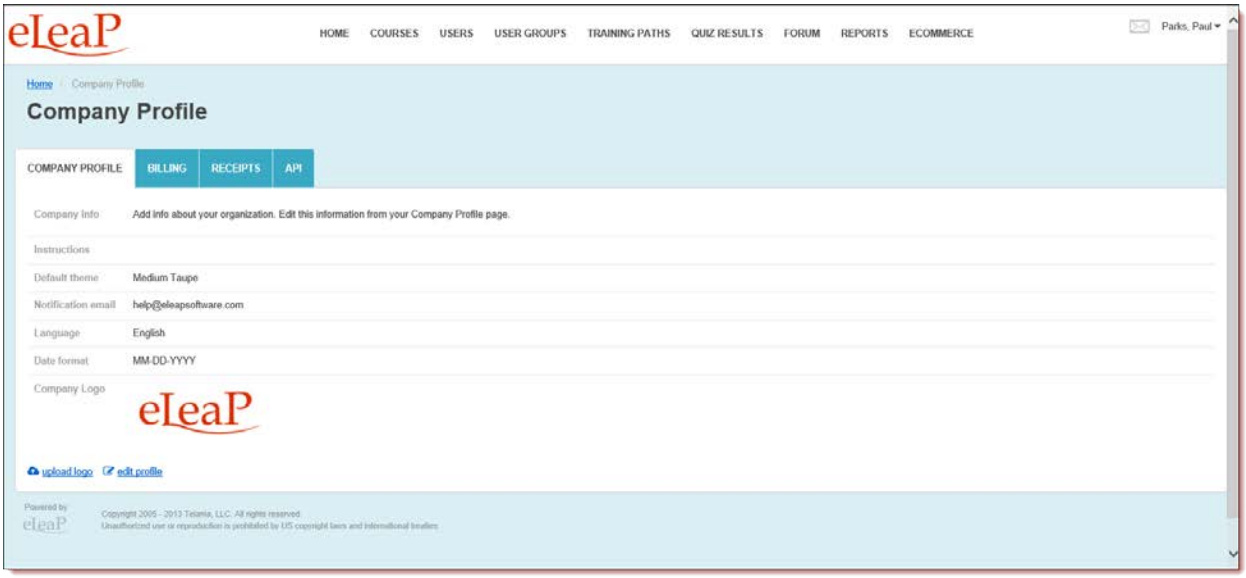
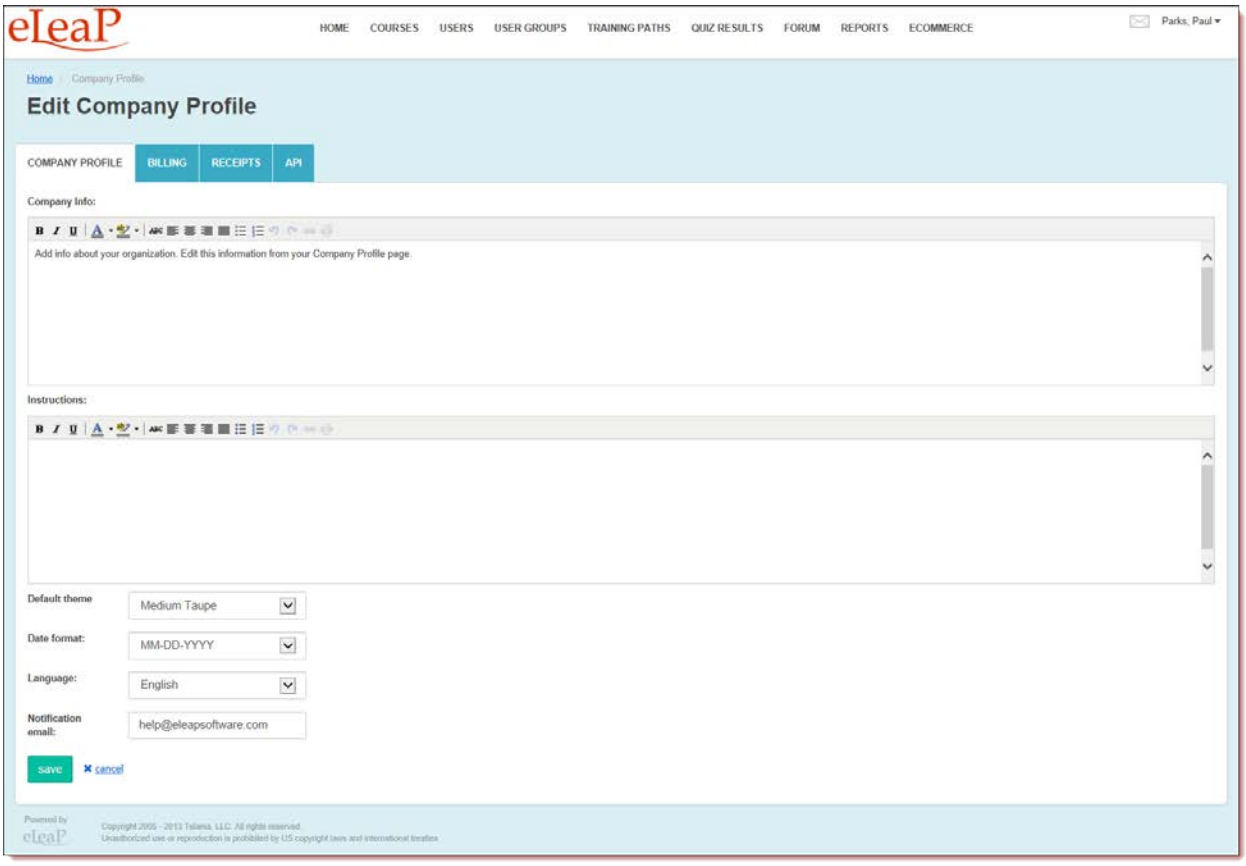


Editing Your Profile Fields

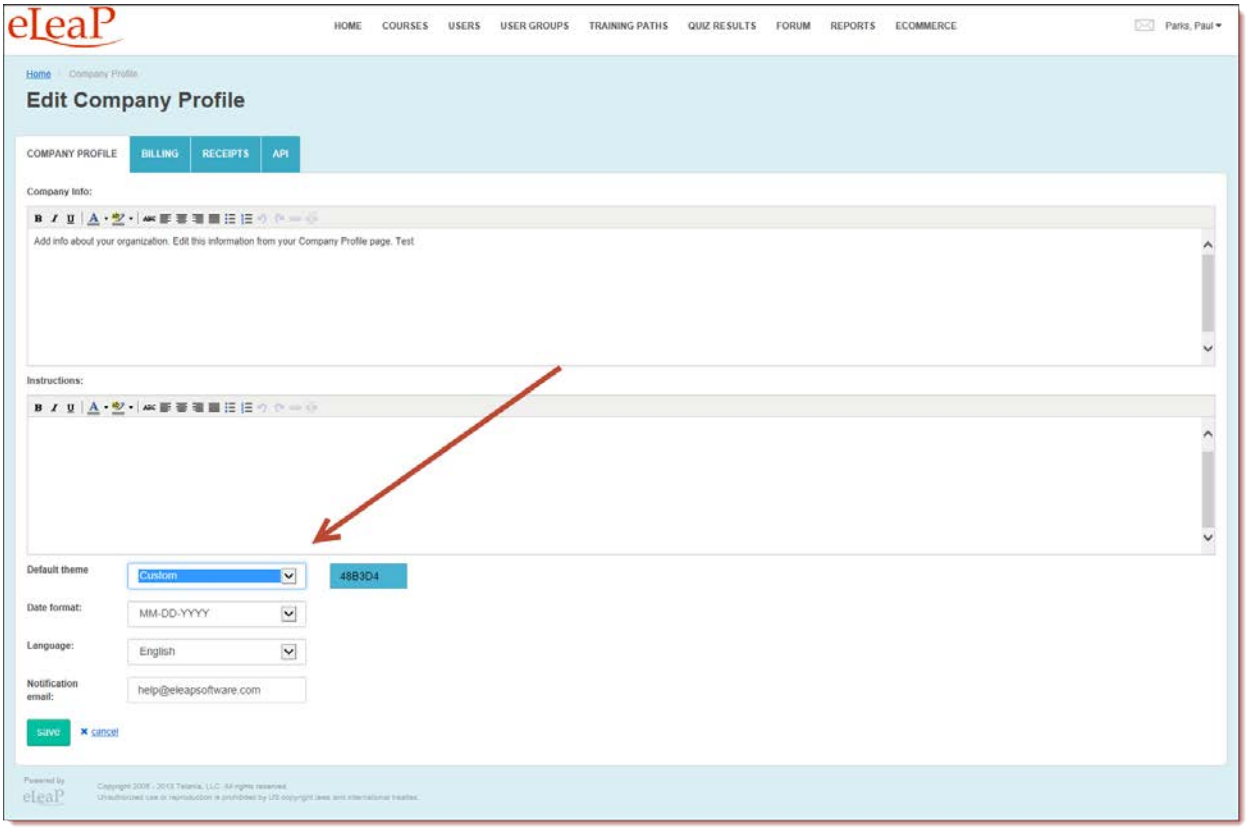
As mentioned above, clicking the **edit profile** link on the **Company Profile** screen allows you to make changes to your Company Profile's settings using the **Edit Company Profile** screen, as shown in the following illustration. Use the steps below to successfully make changes to your Company Profile using this screen.



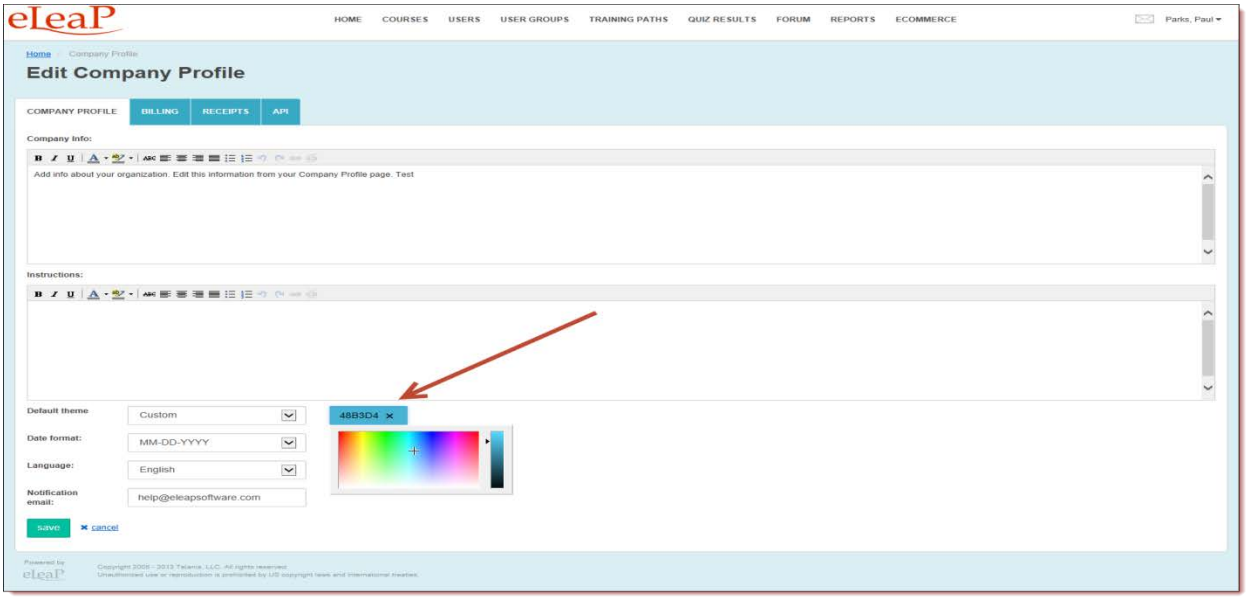
1. Use the **Company Info Editor** to add information about your Company.
2. Use the **Instructions Editor** to add Instructions.
3. Make a different selection on the **Default Theme** list to change the look of your instance of the eLeaP application.
4. Make a different selection on the **Date format** list to use one of the other available date formats.
5. Change the Email Address within the **Notification email** field to change the address to which Notification Emails will be sent.
6. Click save to save your changes to the system.

Using the Custom Theme Option

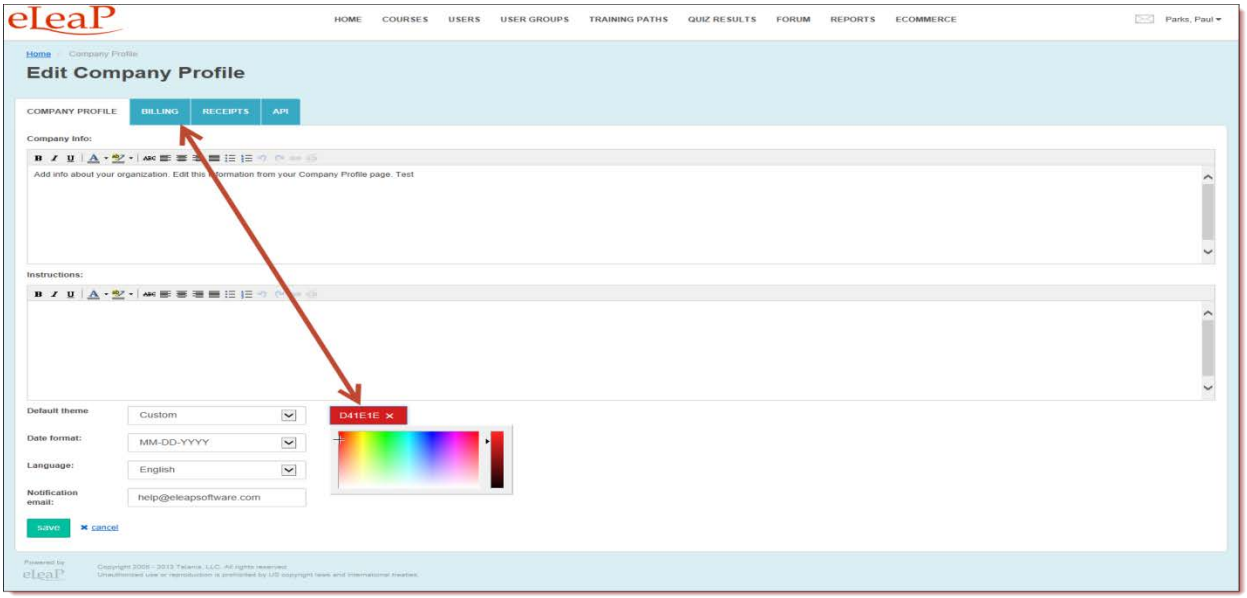
You can use the Custom Theme option to match your organization's color scheme, if desired. Simply select the Custom option on the Theme drop down, as shown in the following illustration.



To change the color scheme for your profile, click to display the color picker, as shown in the following illustration.



Select a new color for your Custom Theme. As shown in the following illustration, our new selection is quite different than the color scheme currently in place.



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Click

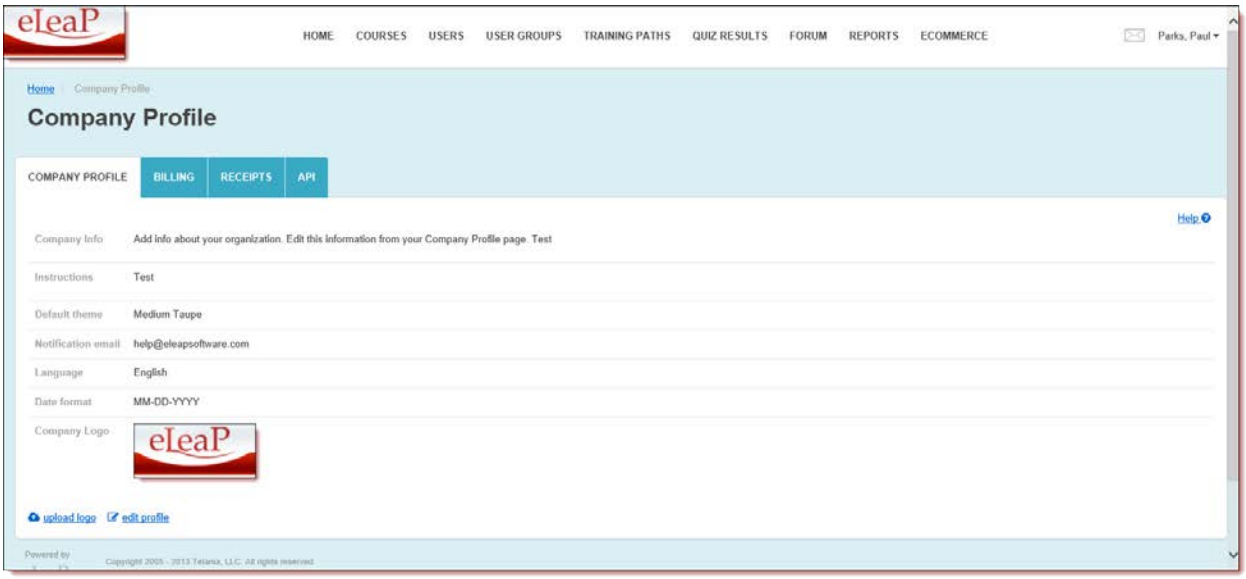
. As shown in the following illustration, the tab colors change to the new color.

Note: When you set up a Custom Theme before creating Trainees, those Trainees inherit the custom settings. However, the system also allows your end users to set their own theme by making a selection on the **Theme** list within their Profile.

For users who selected a different Theme prior to you customizing the color scheme, they will need to select the **Organization** on their Theme list in order to see and enjoy the organization-wide color Theme.

Uploading your Company Logo

Clicking the upload logo link on the **Company Profile** screen allows you to incorporate your company logo into the theme of your instance of the eLeaP application. As shown in the following illustration, the **Company Profile** screen expands to include an **Upload File** portion of the screen.



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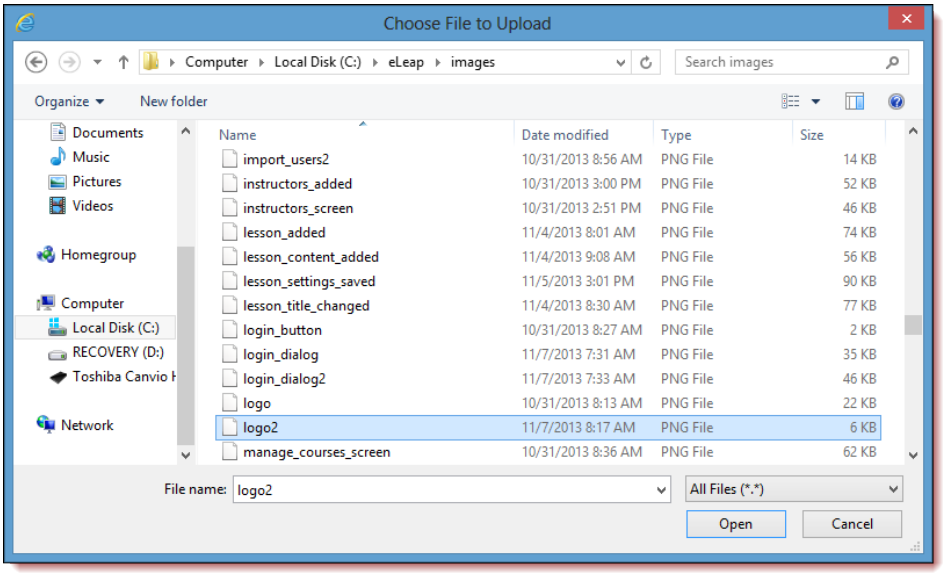
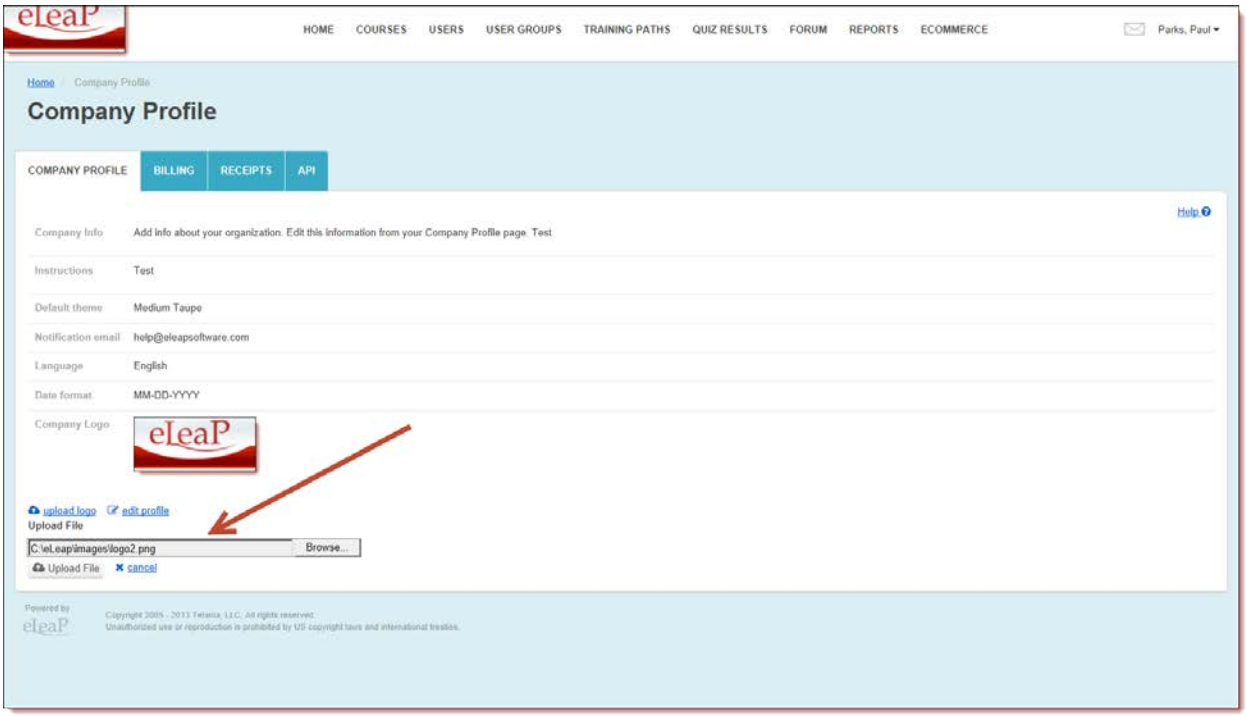
Click Browse... to navigate to the location on your computer where your logo file is stored using the **File to Upload** dialog, shown in the following illustration. Select the logo file and click Open.

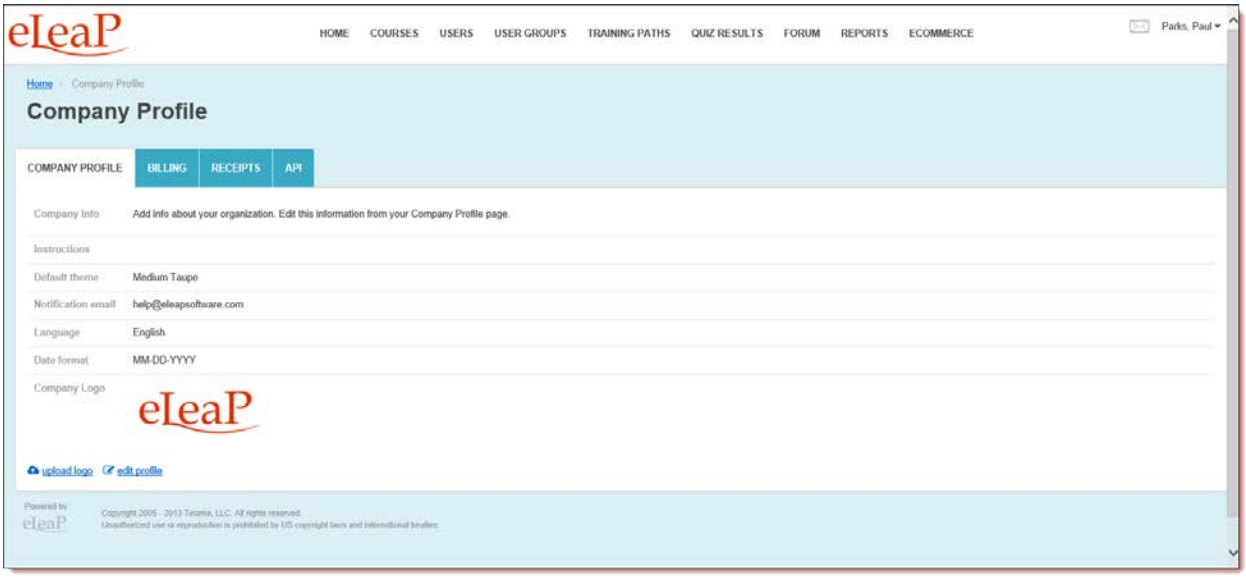


As shown in the following illustration, the file that you've selected now populates the **Upload File** field.

Click Upload File to upload the file to the system.

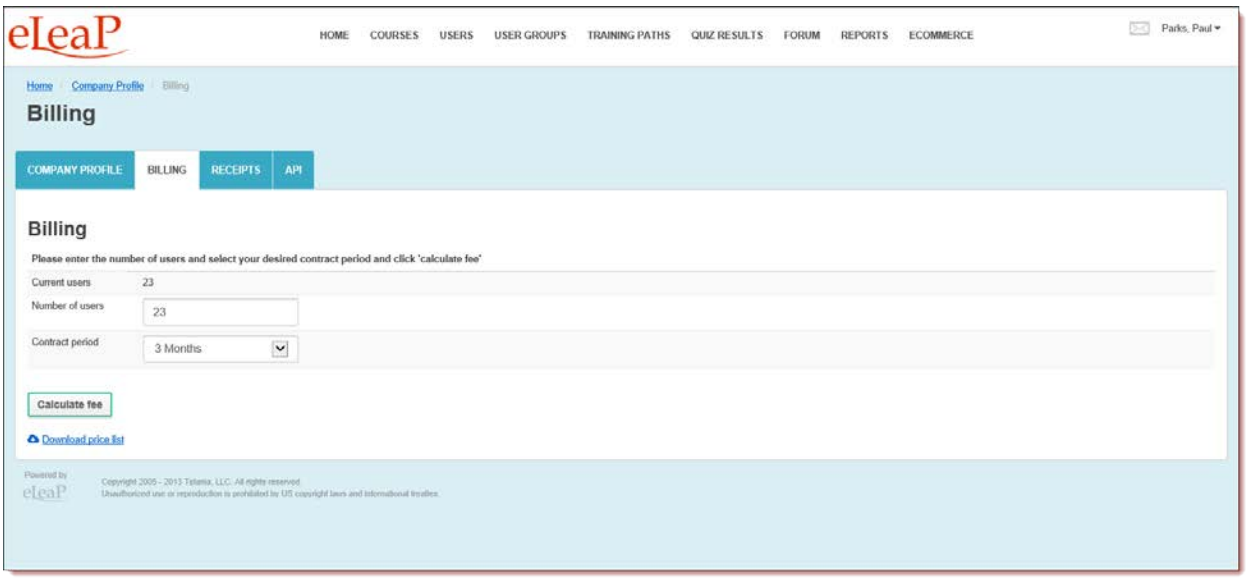


As shown in the following illustration, the logo file is added to the Theme of your instance of the eLeaP application.



Billing

Selecting the **BILLING** tab on the **Company Profile** screen displays the **Billing** screen, as shown in the illustration below. The **Current users** field and the **Number of users** fields are pre-populated based on the Users associated with your account. You can change the Contract Period associated with your account by making a different section from the **Contract period** list. When you make a change here, be sure and click to recalculate the fee associated with your account, based on the new Contract Period.



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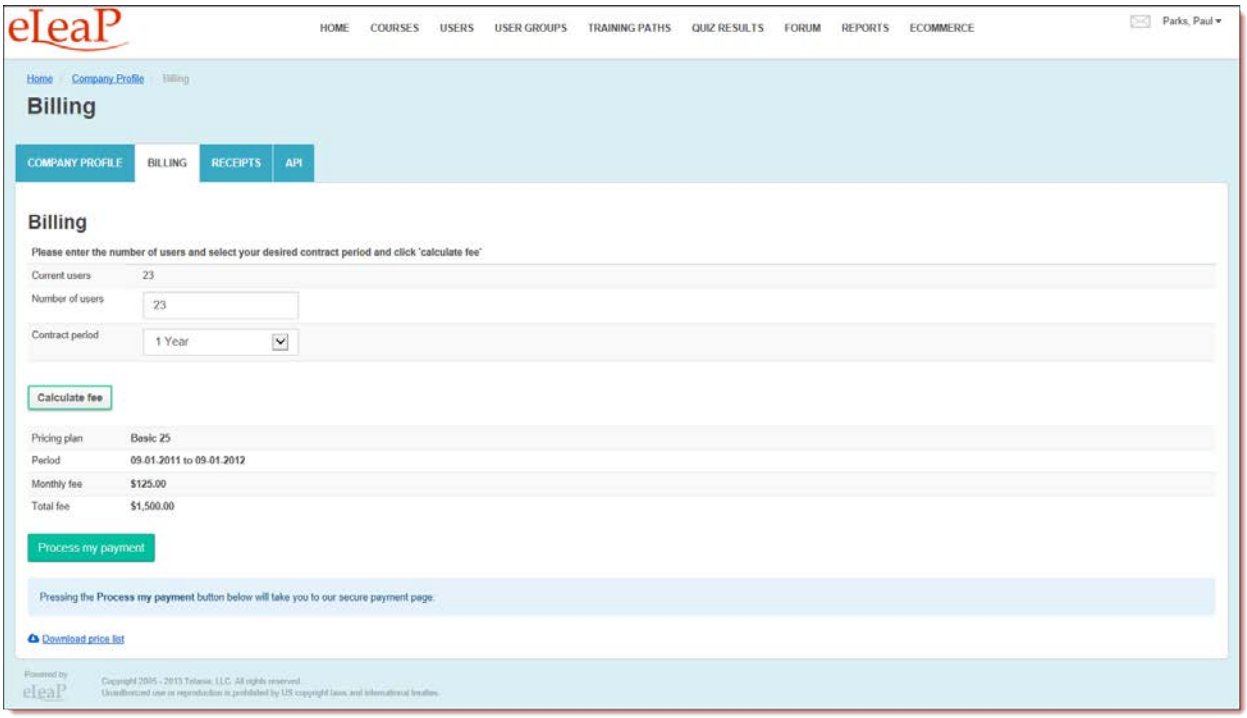
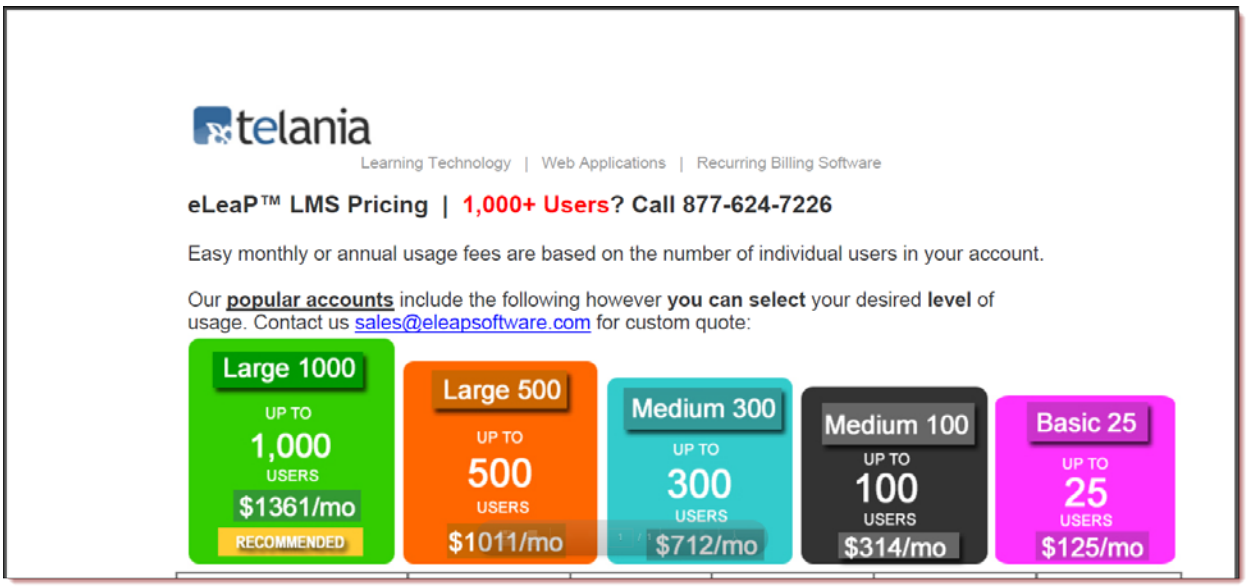
As shown in the following illustration, selecting **1 Year** rather than **3 Months** has the system recalculate the fee associated with your account. You can then click Process my payment to process your payment, which will take you to eLeaP's **Secure Payment** page.



Click the **Download price list** link to download the current price list to a local drive on your computer. As shown in the following illustration, the **price-accounts.pdf** file opens in your browser, where you can use the Bookmark function to always have access to this information.



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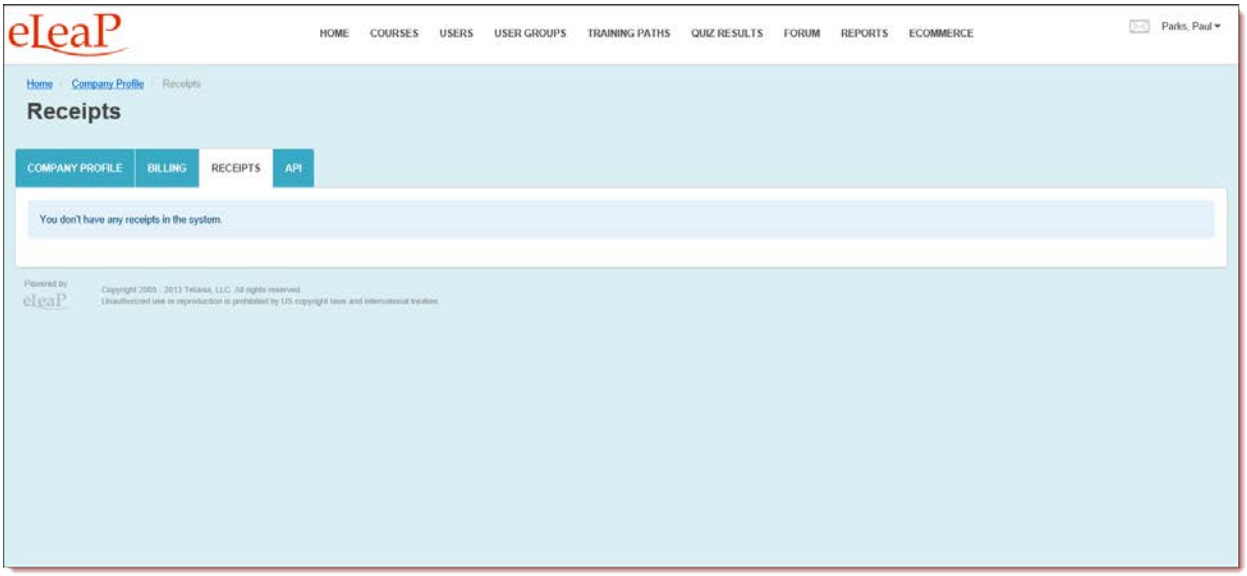
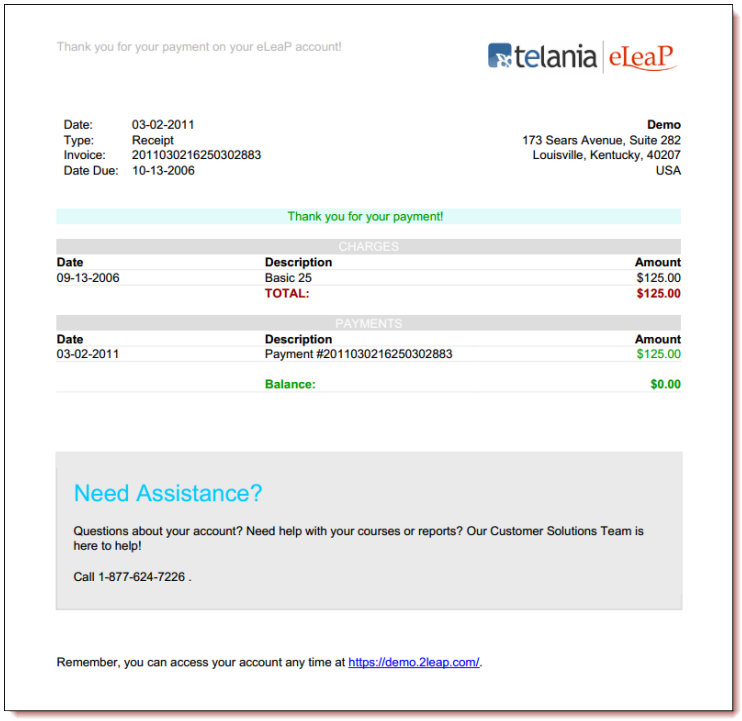
Receipts

Selecting the **RECEIPTS** tab on the **Company Profile** screen displays the **Receipts** screen, illustrated below. This screen will show all of your payments received on a **Receipts** list.



Upon payment, the Customer will receive a Receipt similar to the following example.



Thank you for your payment on your eLeaP account!

telania eLeaP

Date: 03-02-2011
Type: Receipt
Invoice: 2011030216250302883
Date Due: 10-13-2006

Demo
173 Sears Avenue, Suite 282
Louisville, Kentucky, 40207
USA

Thank you for your payment!

CHARGES

Date	Description	Amount
09-13-2006	Basic 25	$125.00
	TOTAL:	**$125.00**

PAYMENTS

Date	Description	Amount
03-02-2011	Payment #2011030216250302883	$125.00
	Balance:	**$0.00**

Need Assistance?

Questions about your account? Need help with your courses or reports? Our Customer Solutions Team is here to help!

Call 1-877-624-7226 .

Remember, you can access your account any time at https://demo.2leap.com/.

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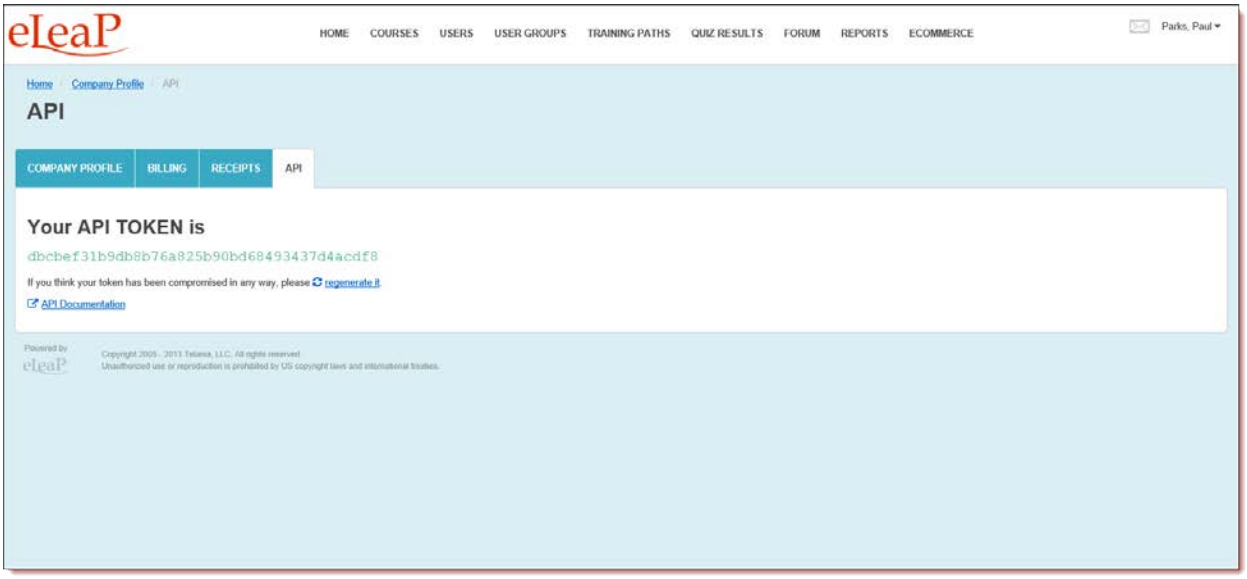
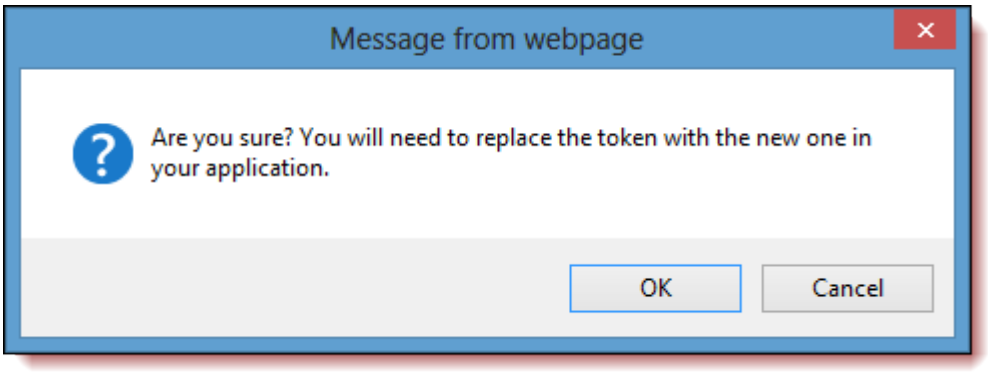
API

Selecting the **API** tab on the **Company Profile** screen displays the **API** screen, illustrated below. This screen shows the **API Token** associated with your account. If you feel that your account has been compromised in any way, click the **regenerate** link to regenerate this Token.



The system displays a warning message, illustrated below, before performing this action to ensure that is your intention. Click OK to proceed with the regeneration process or click Cancel to cancel it. Please note that if you proceed, you will need to replace the existing token with the new one in your application.



Clicking the API Documentation link takes you to eLeaP's online API documentation at http://www.eleapsoftware.com/api/, as shown in the following illustration, which you can either read through online or click the **DOWNLOAD API USER Guide** link to download it to your computer.

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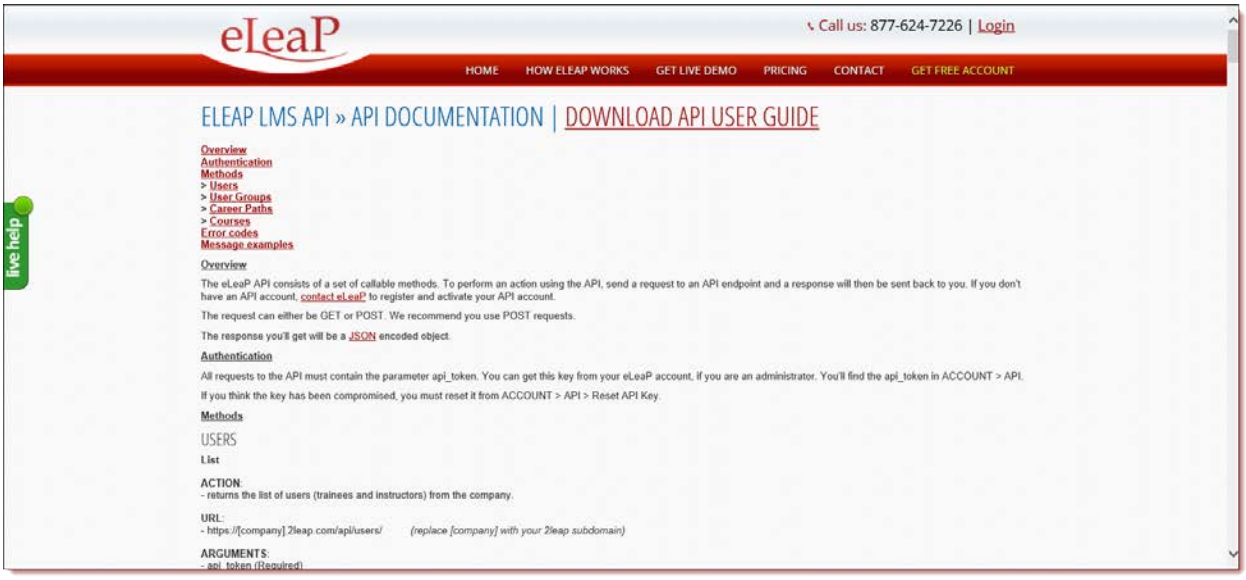
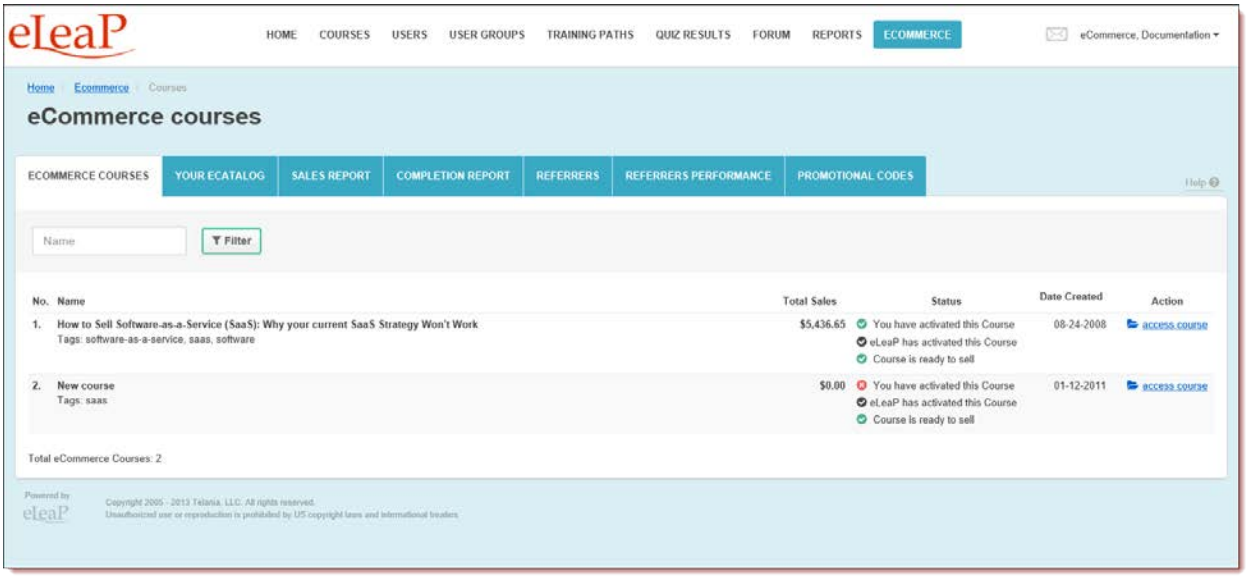


Ecommerce Courses

Selecting **ECOMMERCE** on the menu bar displays the **eCommerce courses** screen, as shown in the following illustration. Each eCommerce course that you create is displayed here on an **eCommerce Courses** list, with the Course's **Name**, **Total Sales**, **Status** and **Date Created** details shown. The Status for the Course indicates whether or not **you have activated the course**, whether or not **eLeaP has activated the course**, and whether or not the **course is ready to sell**. You can filter the Courses displayed on this screen, when it becomes necessary, by entering a Course Name in the **Name** field, and then clicking Filter.You can also click the **access course** link within the **Action** column to access the eCommerce Course details.



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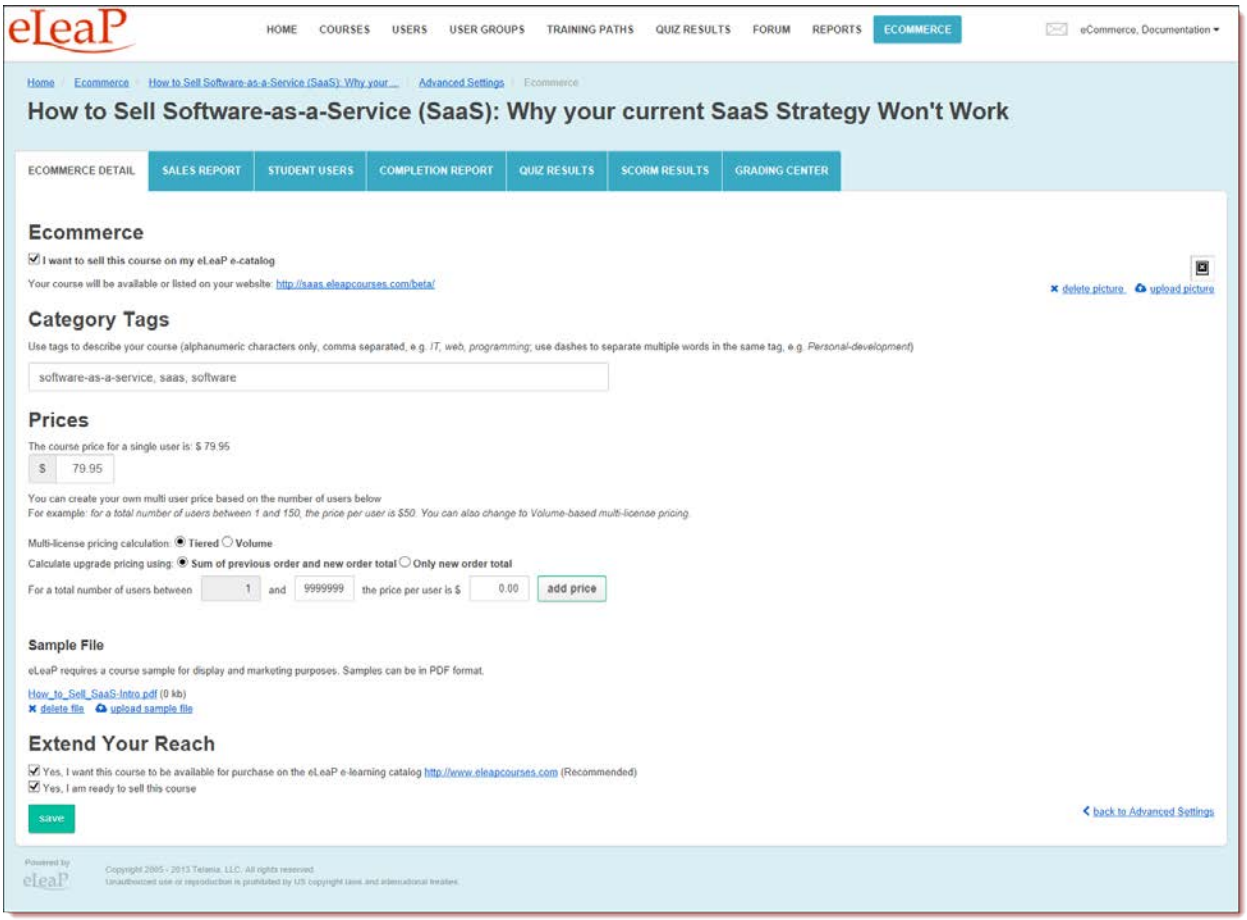
eCommerce Course Details

Selecting the **access course** link for an eCommerce Course on the **eCommerce Courses** list displays the **ECOMMERCE COURSES** tab/screen for that Course, as shown in the following illustration. This screen is where you will configure an eCommerce Course's settings. Use the steps below to successfully configure an eCommerce Course.



Within the **Ecommerce** portion of the screen:

1. Select or deselect the **I want to sell this course on my eLeaP e-catalog** check box, depending on whether or not you want to offer the Course via your ECatalog.

Within the **Category Tags** portion of the screen:

2. Use tags to describe your course (alphanumeric characters only, comma separated, e.g. *IT, web, programming*; use dashes to separate multiple words in the same tag, e.g. *Personal-development*).

Within the **Prices** portion of the screen:

3. Enter the price for a single user to take a Course in the **Course Price for a single user** is field.

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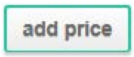
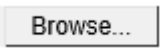
Note: You can create your own multi user price based on the number of users below. For example, for a total number of users between 1 and 150, the price per user is $50. You can also change to Volume-based multi-license pricing.

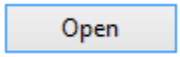
4. Select either the **Tiered** or **Volume** radio button for the **Multi-license pricing calculation**.
5. Select either the **Sum of previous order and new order total** or the **only new order total** radio button as the **Calculate upgrade pricing using method** option, as appropriate to this Course.
6. Enter the upper range value in the **Upper Range** field for the number of Users and then click 

. The pricing will be added to the Pricing Structure. Once pricing has been added, you can click the **delete** link to remove it.

   Note: Since pricing is cumulative, deleting a single price level will void all other price levels.

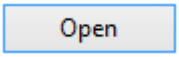
Within the **Sample File** portion of the screen:

7. Click the **upload sample file** link. eLeaP requires a course sample for display and marketing purposes. Samples can be in PDF format. The screen expands to display an **Upload File** field. Click 

to navigate to the location on your computer where your sample file is stored and, using the **File to Upload** dialog, click 

to populate the **Upload File** field, and then click

to upload the File.
8. Select the **Yes, I want this course to be available for purchase on the eLeaP e-learning catalog** http://www.eleapcourses.com **(Recommended)** check box and/or the **Yes, I am ready to sell this course** check box, as appropriate to your circumstances.
9. Click the **upload picture** link to associate an image with the Course. The screen expands to display an **Upload File** field. Click

to navigate to the location on your computer where your sample file is stored and, using the **File to Upload** dialog, click 

to populate the **Upload File** field, and then click

to upload the File.
10. Click

to save your changes to the system.

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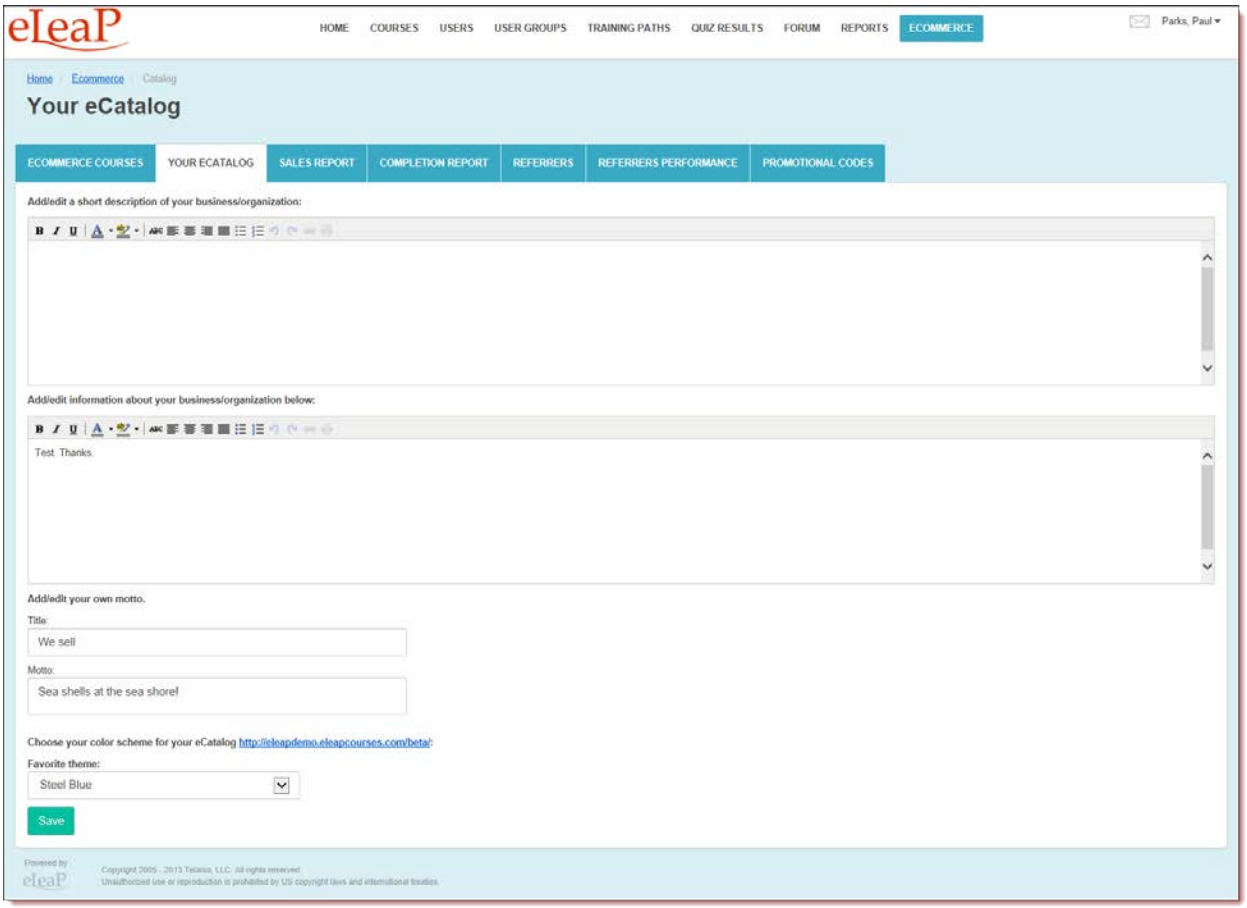
Your ECatalog

Selecting the **YOUR ECATALOG** tab on the **eCommerce** screen's menu bar displays the **Your eCatalog screen**, illustrated below. This screen allows you to add a description and miscellaneous information about your business/organization. You can also add a company motto, choose the color scheme for your eCatalog and select a favorite theme for it using this screen. Use the steps below to successfully configure these elements of your eCatalog.



1. Add a short description of your business/organization within the **Add/edit a short description of your business/organization** box. Use any of the functionality within the **Content Editor** to format this information, if desired.
2. Add any additional miscellaneous information about your business/organization within the **Add/edit information about your business/organization below** box. Use any of the functionality within the **Content Editor** to format this information, if desired.
3. Within the **Add/edit your own motto** portion of the screen, enter a **Title** and a Motto within their respective fields to synopsize what your business/organization stands for.
4. Use the **Choose your color scheme for your eCatalog** link to select a color scheme for it.
5. Select a different Theme for your eCatalog from the **Favorite Theme** list, if desired.
6. Click

to save your changes to the system.

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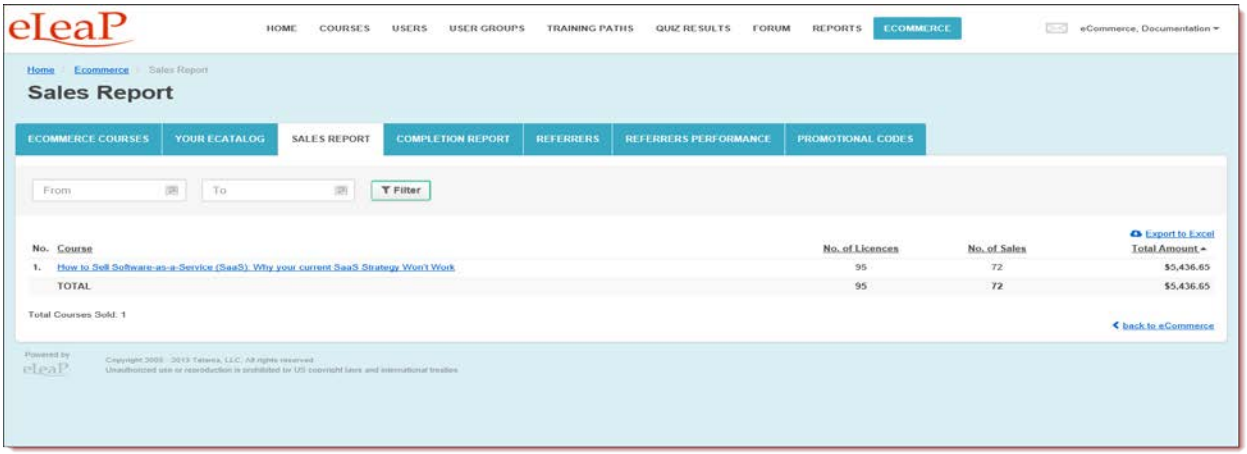
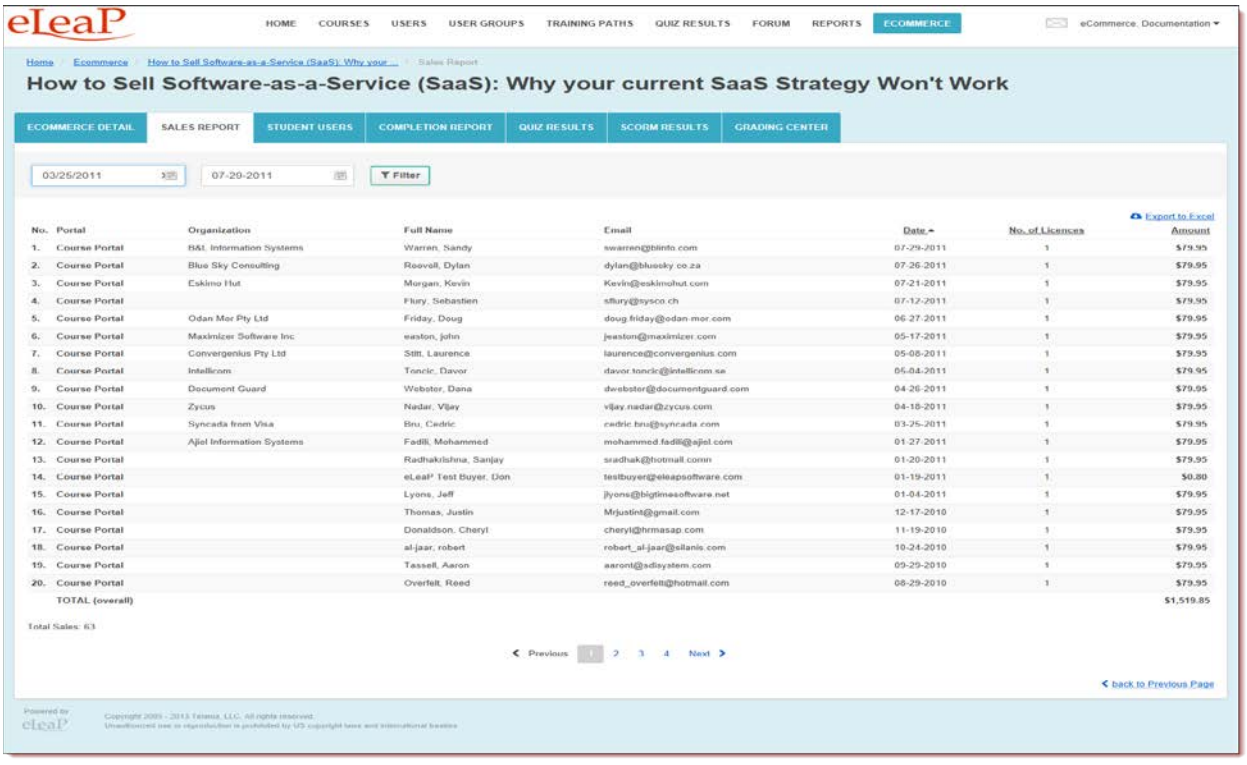
Sales Report

Selecting the **SALES REPORT** tab on the **Ecommerce** screen displays the **Sales Report** screen, shown in the following illustration. This screen shows the **Course**, **No. of Licenses**, **No. of Sales** and **Total Amount** details associated with a Course's sales. Filter what displays on this screen by entering **From** and **To** dates, either entering the dates manually, or using the **Calendar** to select them, and clicking Filter.



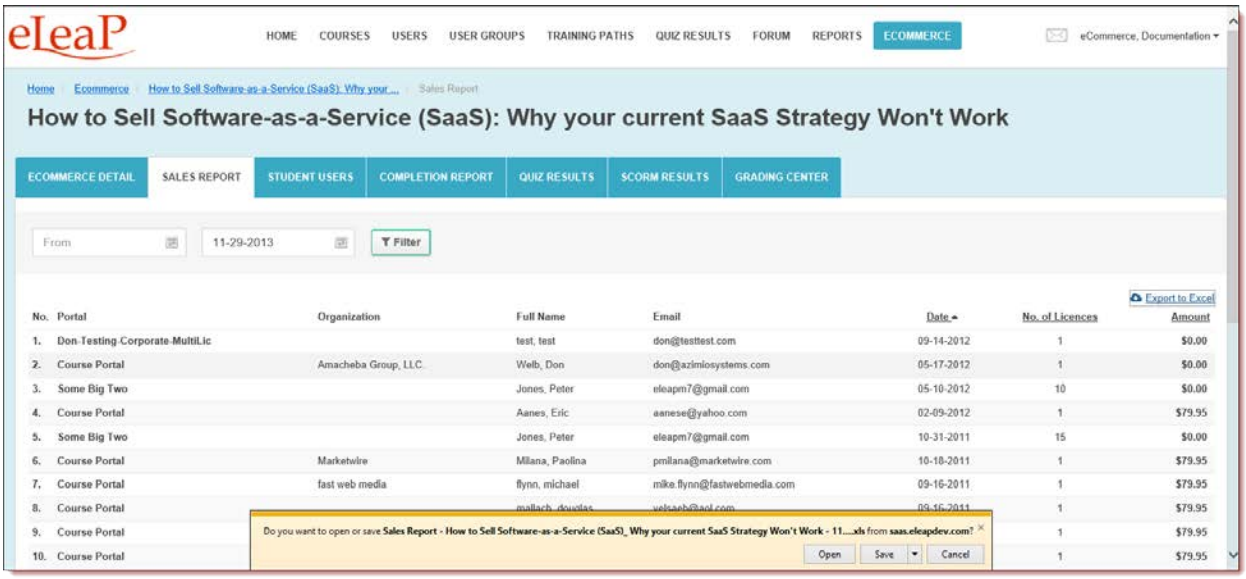
Viewing Course Details

Clicking on a Course Name on the **Courses** list displays the **Course Details** screen for that Course, as shown in the following illustration. This screen displays the **Portal**, **Organization**, **Full Name**, **Email**, **Date**, **Number of Licenses** and **Amount** details for each sale of that particular Course.

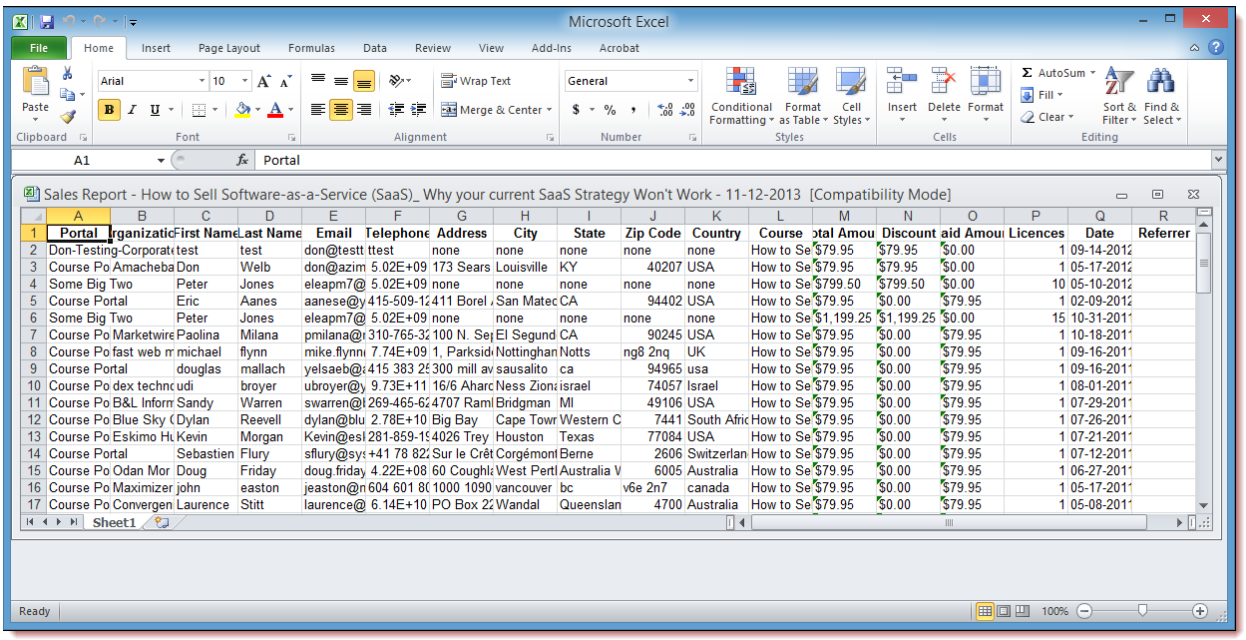


Exporting Sales Details

Click the **Export to Excel** link on the **Sales Details** screen to export Sales Details to a local drive on your computer. As shown in the following illustration, you are presented with the option to either **Open** or **Save** the Excel file.



As shown in the following illustration, all of your Sales Details are now available within Excel.



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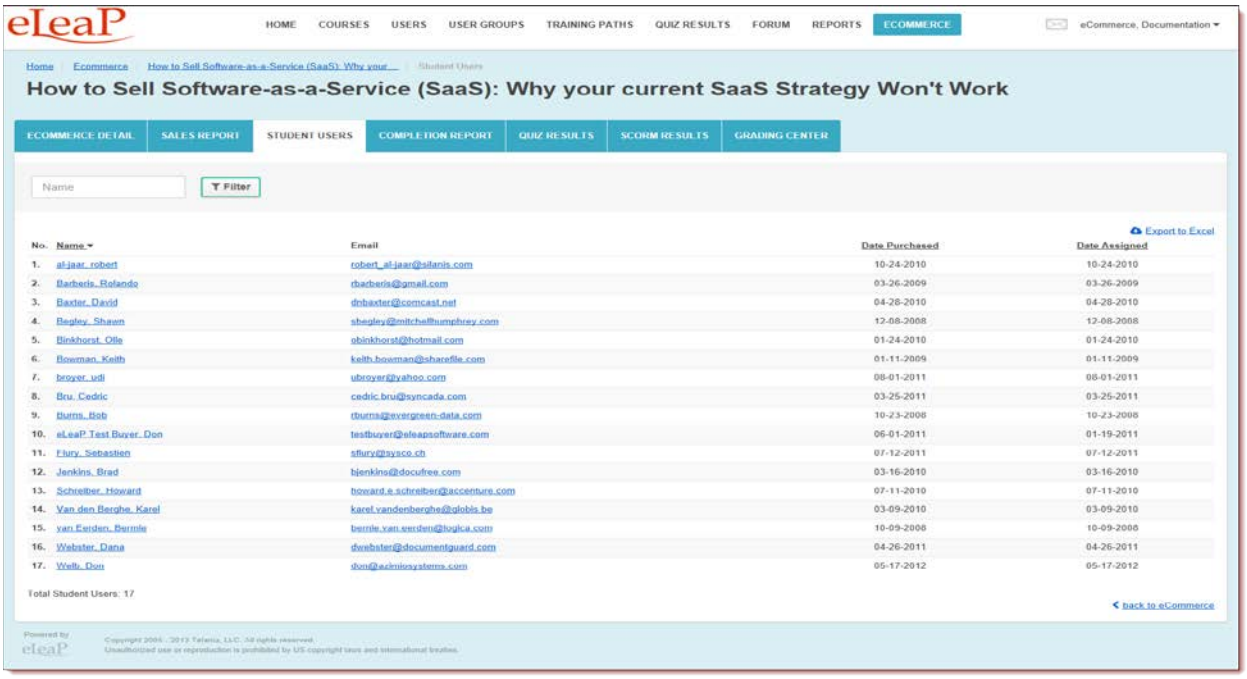
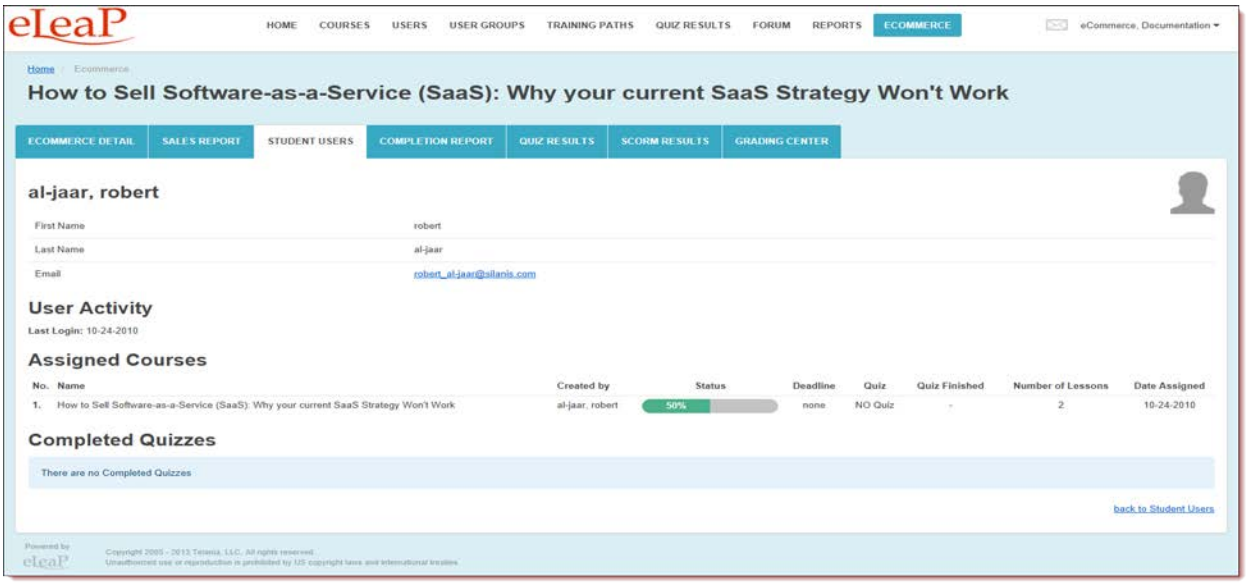
Student Users

Selecting the **STUDENT USERS** tab within the **Ecommerce** screen displays the **Student Users** screen, illustrated below. This screen displays the **Name**, **Email**, **Date Purchased** and **Date Assigned** details for each Student on the **Student Users** list who has purchased this particular Course.



Viewing Student User Details

Selecting a Name on the **Student Users** list displays the **Student User Details** screen for that Student User. In addition to the Student User's **First Name**, **Last Name** and **Email** details, this screen shows you the **User Activity**, **Assigned Courses** and **Completed Quizzes** associated with that Student User.



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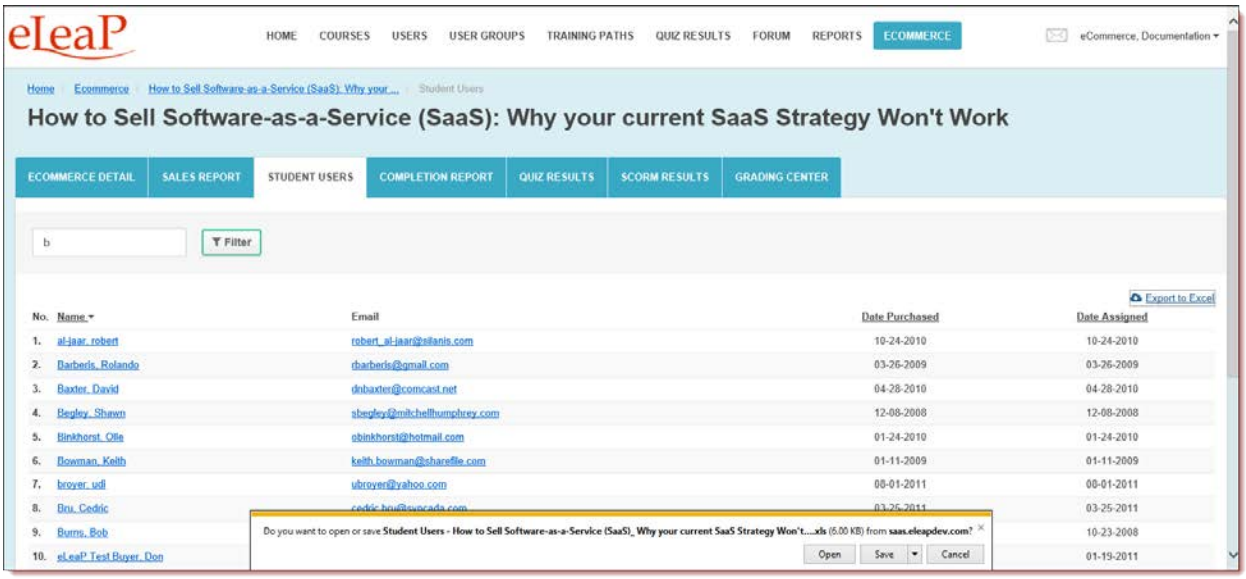
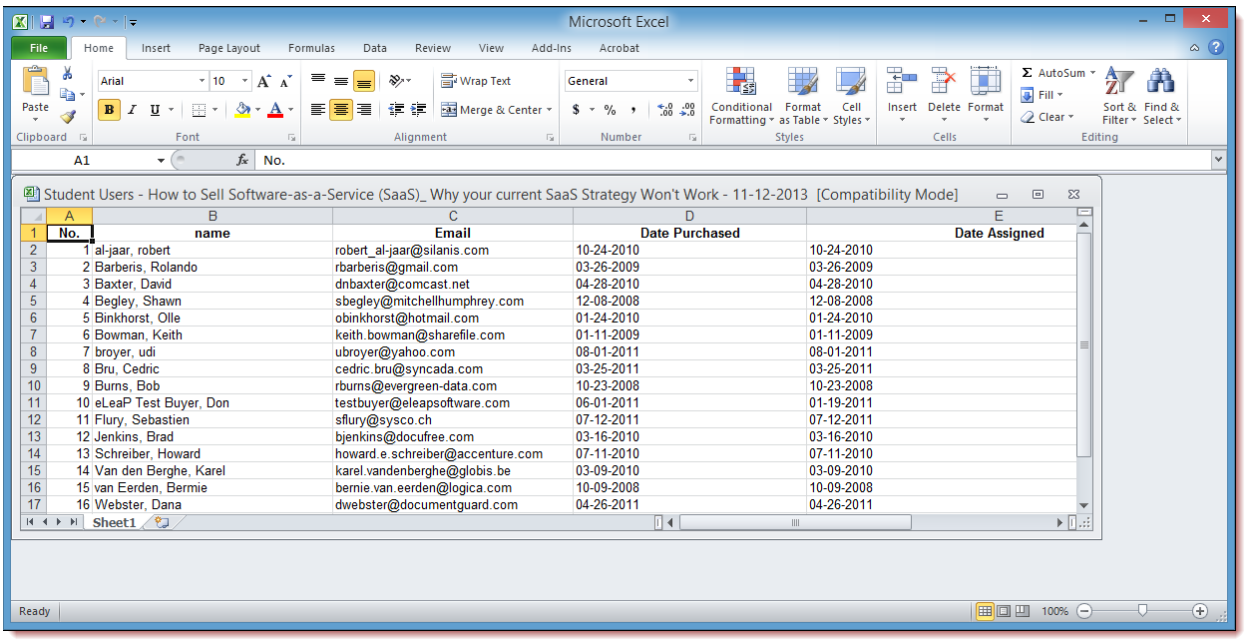
Exporting Student User Details

Selecting the **Export to Excel** link on the **Student Users** screen allows you to export all of this data to a local drive on your computer. As shown in the following illustration, you are given the option to either **Open** or **Save** the Excel file.



As shown in the following illustration, all of your Student User Details are now available within Excel.



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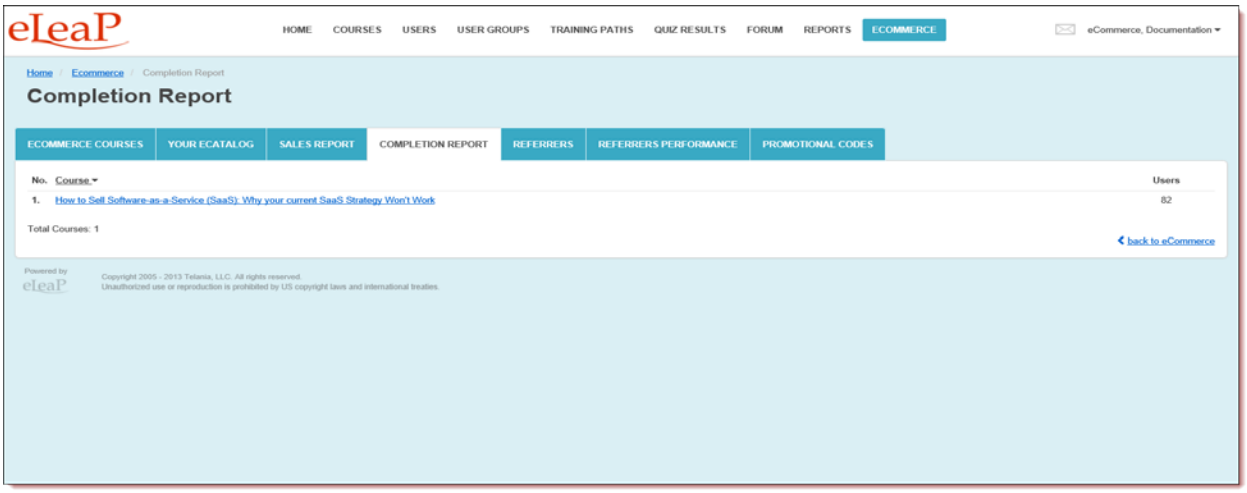
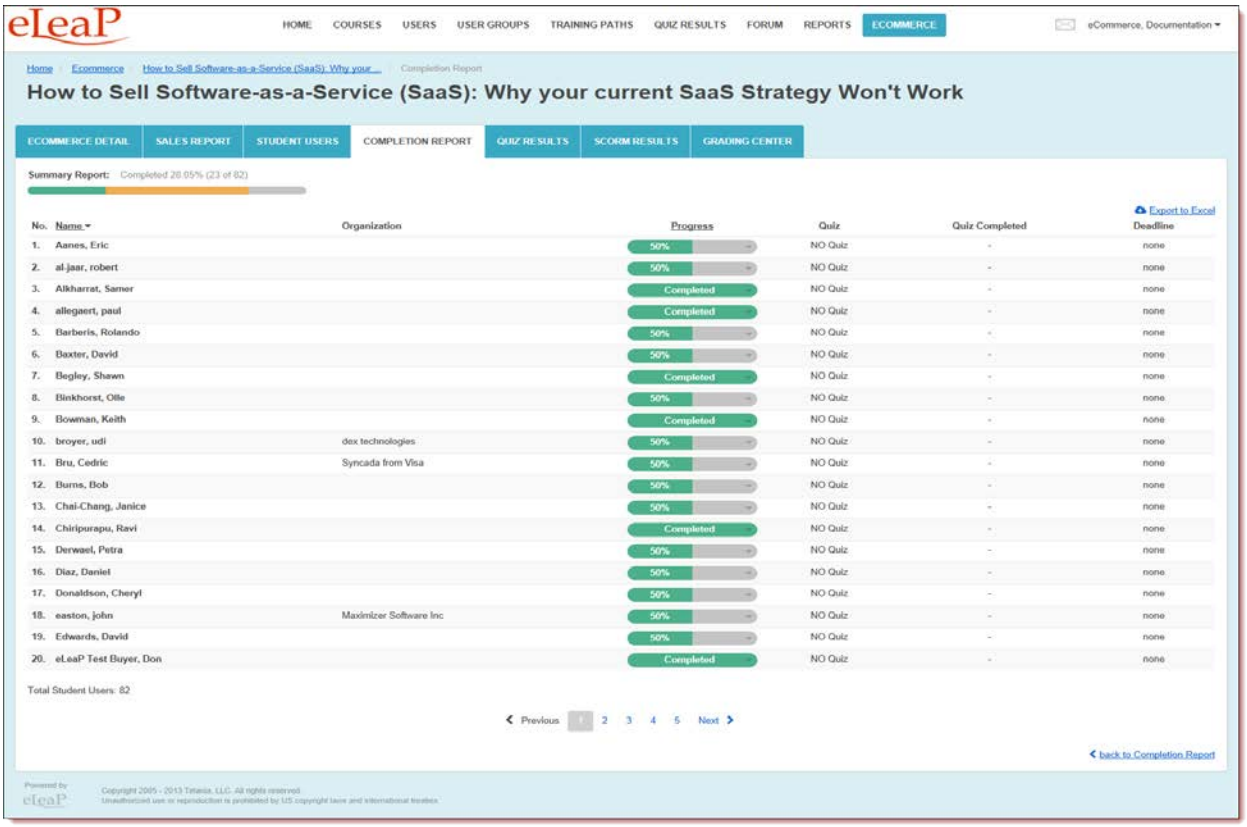
Completion Report

Selecting the **COMPLETION REPORT** screen within the **Ecommerce** screen displays the **Completion Report** screen, illustrated below. Each Completion Report on the Completion Reports list displays the **Name** and **Users** details for that Report.

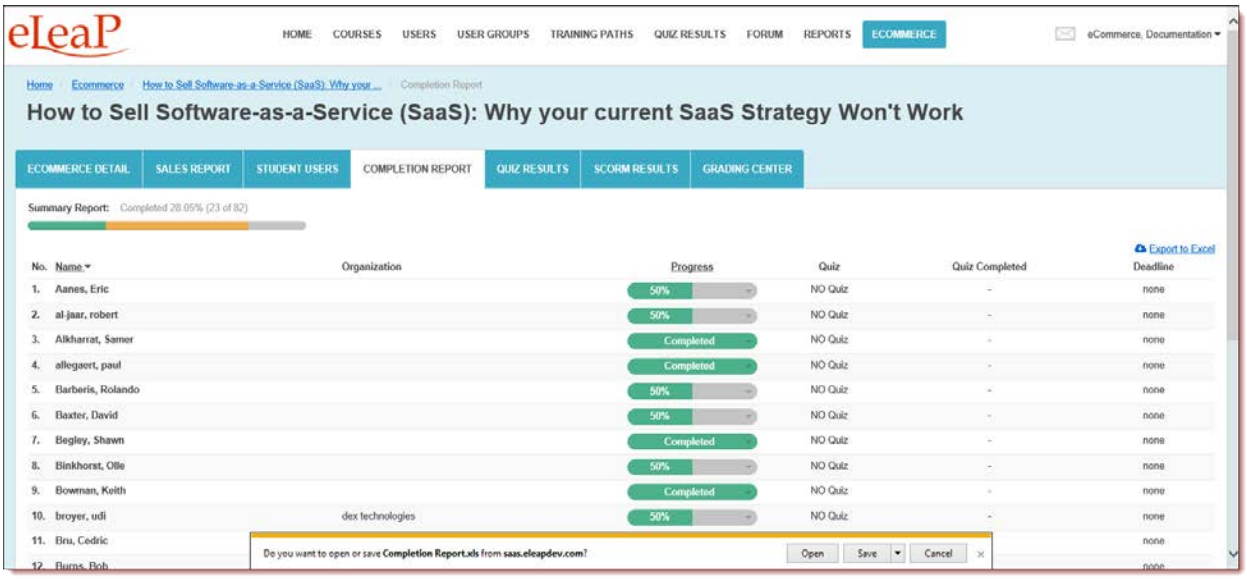


Clicking on the **Completion Report Name** displays the **Completion Report Details** screen, listing each of the Course's registered Students, including the **Name**, **Organization**, **Progress**, **Quiz**, **Quiz Completed** and **Deadline** details for that Student.

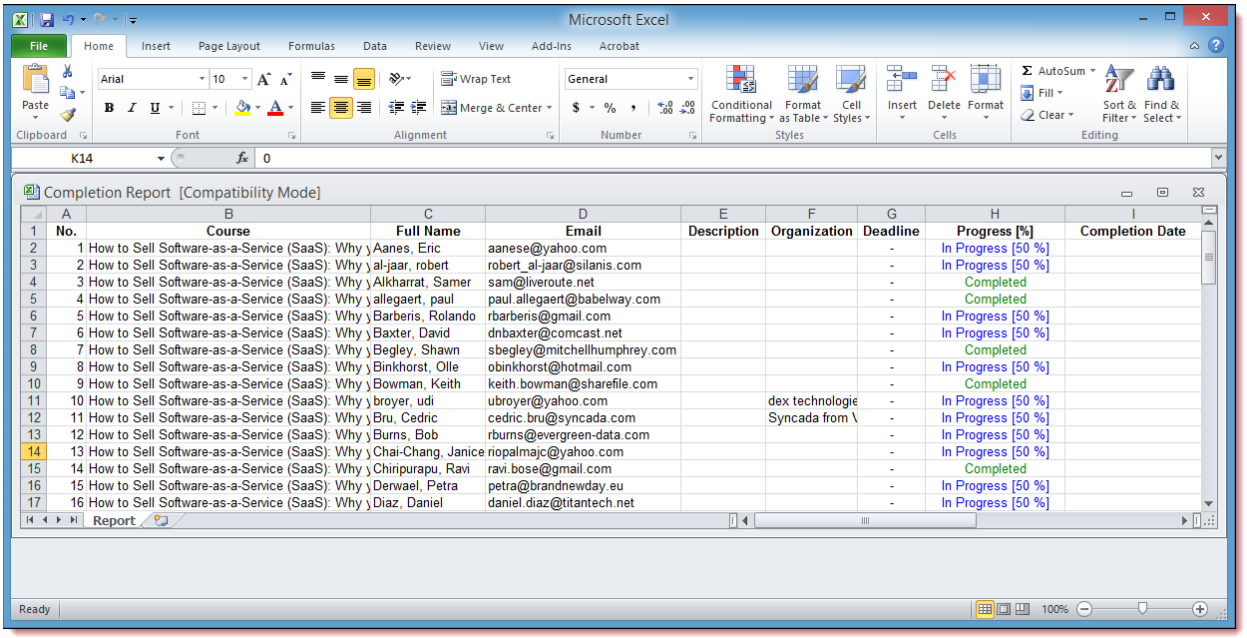


Exporting Completion Reports

Clicking the **Export to Excel** link on the **Completion Report Details** screen allows you to export this information to a local drive on your computer. As shown in the following illustration, you are presented with the option to either **Open** the file or **Save** it.

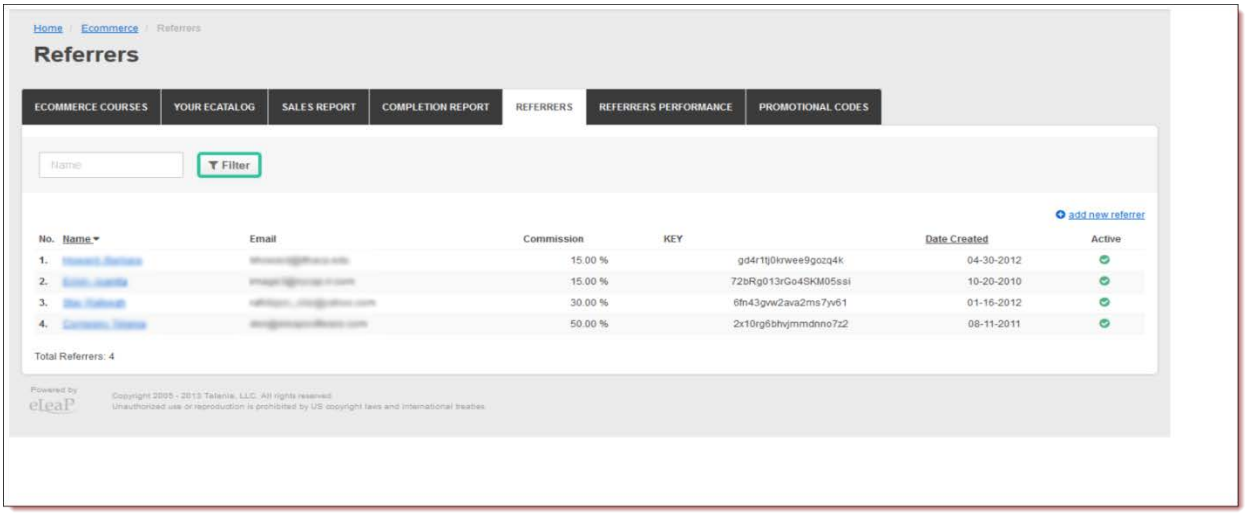


Once you've downloaded the file, it opens in Excel, as shown in the following illustration. You now have local access to the Completion Report data for all of the Students in that Course.



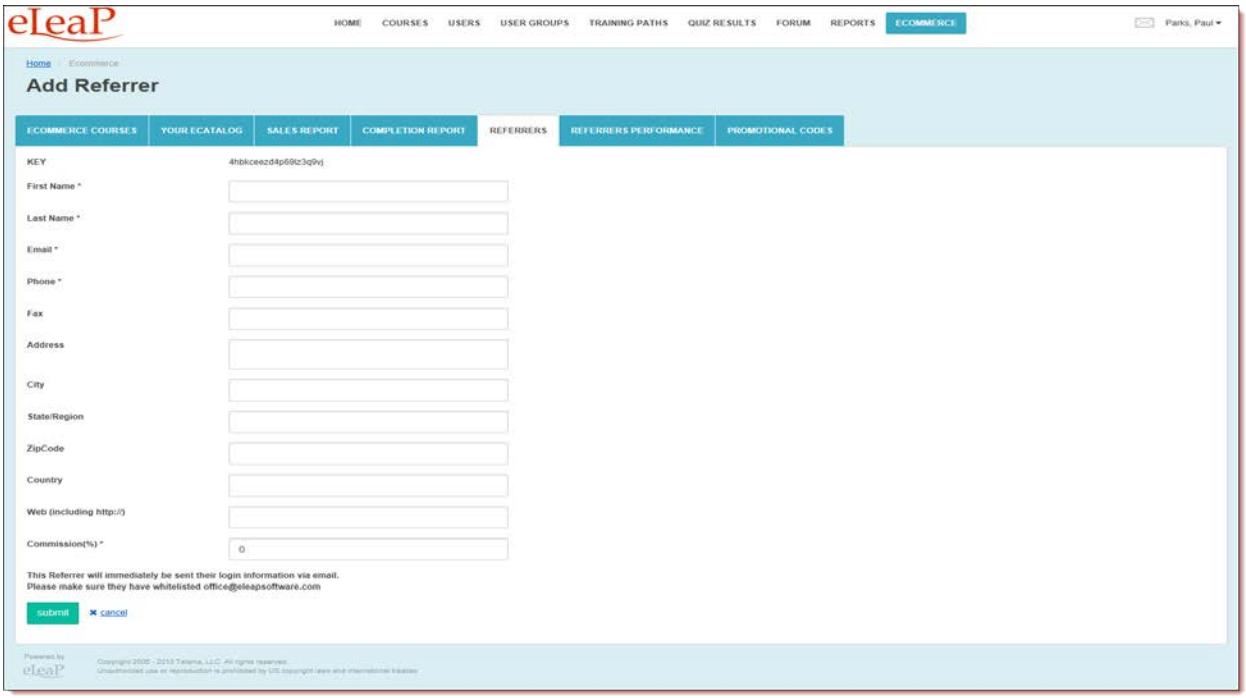
Referrers

Selecting the **REFERRERS** tab on the **Ecommerce** screen displays the **Referrers** screen, as shown in the following illustration. This screen displays a list of individuals or companies that have been referred as potential customers of the eLeaP system on a **Referrers** list, and shows the **Name**, **Email**, **Commission**, **KEY** and **Date Created** details for each Referrer on the list.



Adding a Referrer

Selecting the **add new referrer** on the **Referrers** screen displays the **Add Referrer** screen, as shown in the following illustration. Follow the steps below to successfully add a Referrer to the system. Please note that the **Key** is a system-generated value.



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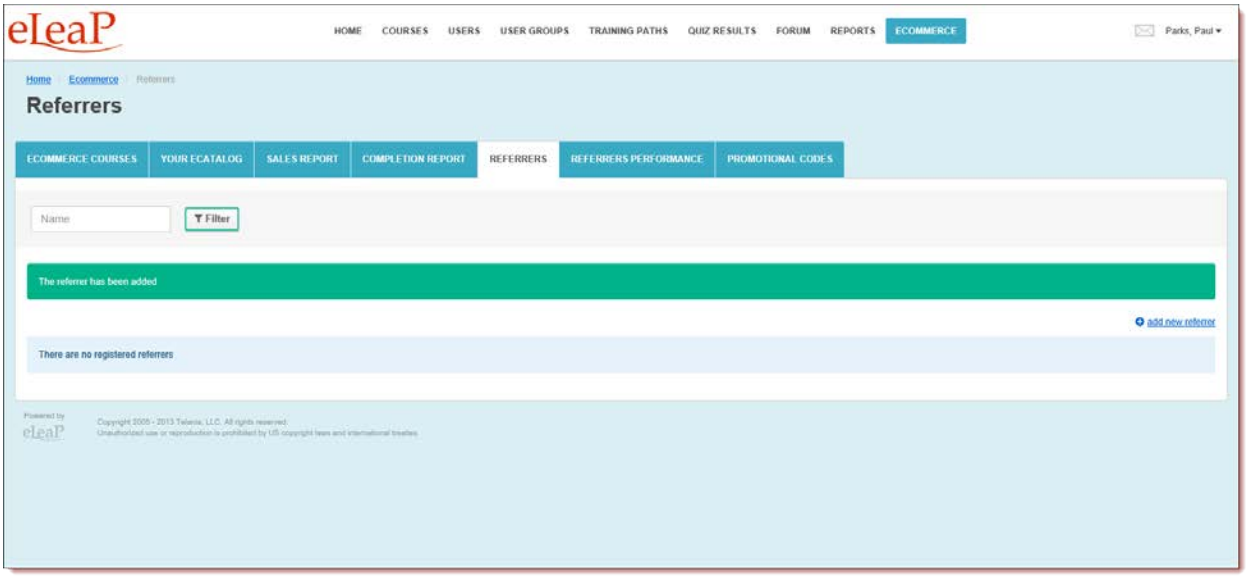
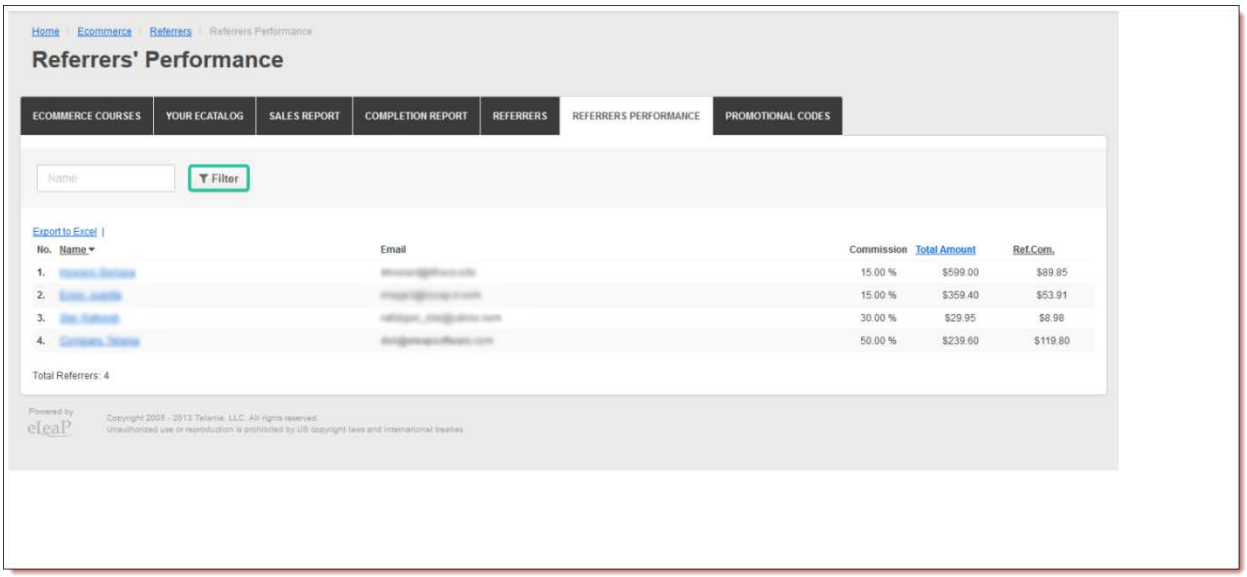
1. Enter a First Name for the new Referrer in the **First Name** field.
2. Enter a Last Name for the new Referrer in the **Last Name** field.
3. Enter an Email Address for the new Referrer in the **Email** field.
4. Enter a Phone Number for the new Referrer in the **Phone** field.
5. Enter a Fax Number for the new Referrer in the **Fax** field.
6. Enter a Street Address for the new Referrer in the **Address** field.
7. Enter a City Location for the new Referrer in the **City** field.
8. Enter a State/Region location for the new Referrer in the **State/Region** field.
9. Enter a Zip or Postal Code for the new Referrer in the **ZipCode** field.
10. Enter a Country Location for the new Referrer in the **Country** field.
11. Enter a Web URL for the new Referrer in the **Web (including http://)** field.
12. Enter a Commission Percentage for the new Referrer in the **Commission (%)** field. You are required to add a value within this field; it cannot be left set at 0.
13. Click Submit to create the new Referrer.

As shown in the following illustration, the Referrer has been added to the **Referrers** list on the Referrers screen

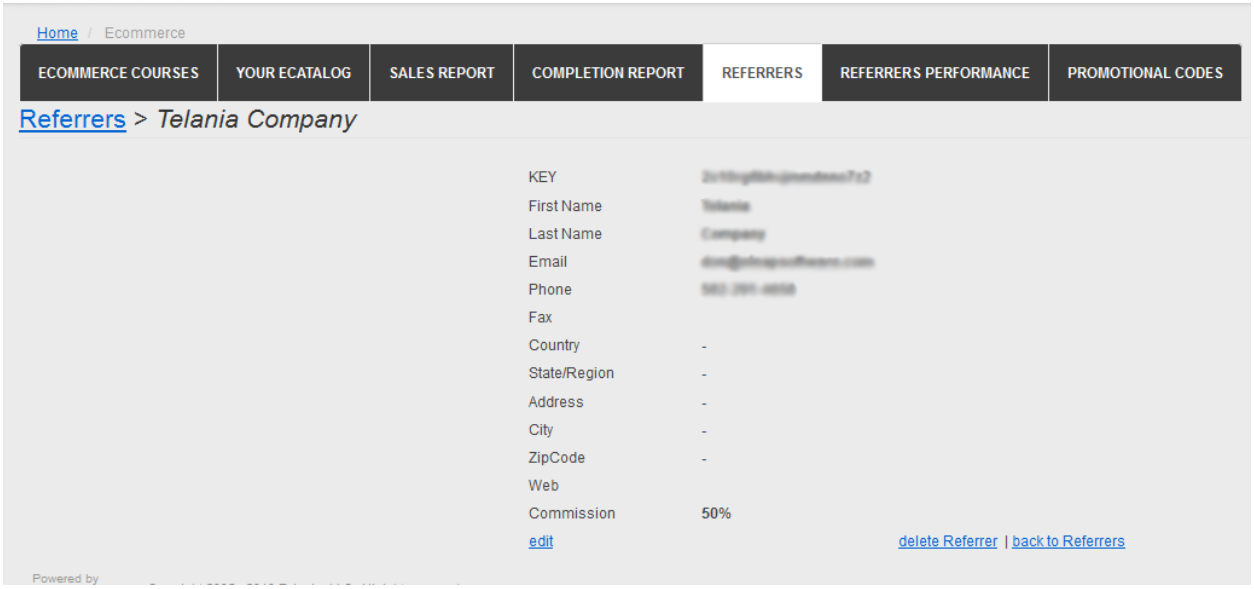


Referrers Performance

Selecting the **REFERRERS PERFORMANCE** tab within the **Ecommerce** screen displays the **Referrers' Performance** screen, as shown in the illustration below. Each line on the **Referrers** list displays the **Name**, **Email**, **Commission**, **Total Amount** and **Ref.Com details** for that Referrer.



Clicking a Referrer's Name allows you to view that Referrer's Detail information, as shown in the following illustration.



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Exporting Referrer Performance

Selecting the **Export to Excel** link on the **Referrers' Performance** screen allows you to export this information to a local drive on your computer. As shown in the following illustration, you are provided with the option to either **Open** or **Save** the file.

As shown in the following illustration, the file is displayed within Excel so that you now have local access to this information.

	A	B	C	D	E	F
1	No.	Name	Email	Commission percentage	Total Amount	Referrer Commission
2	1	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
3	2	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
4	3	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
5	4	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
6						

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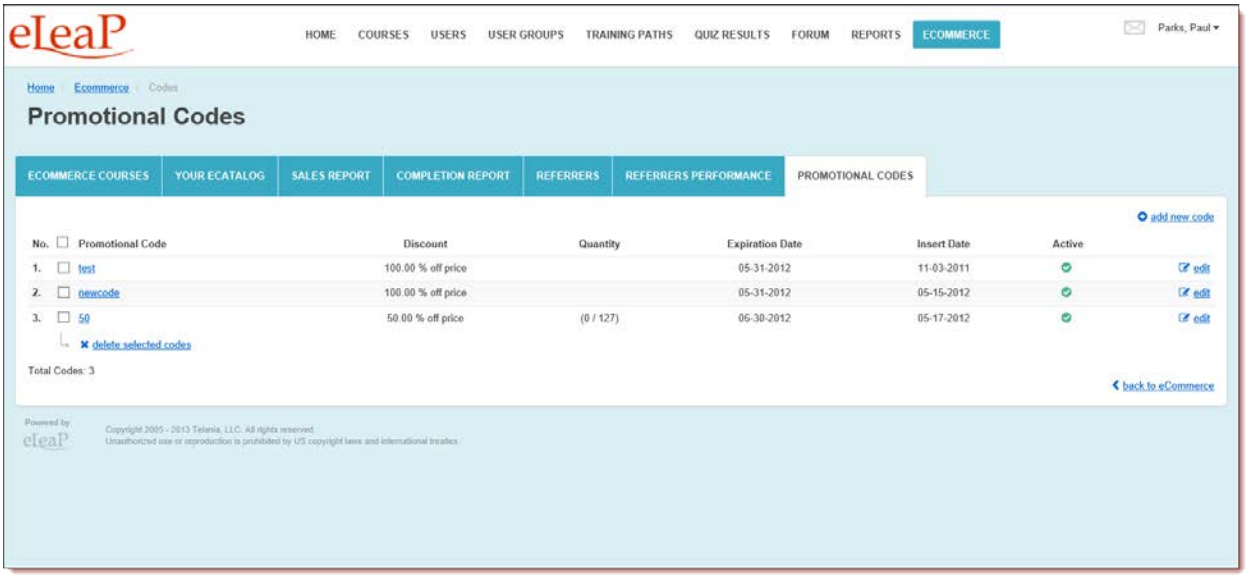
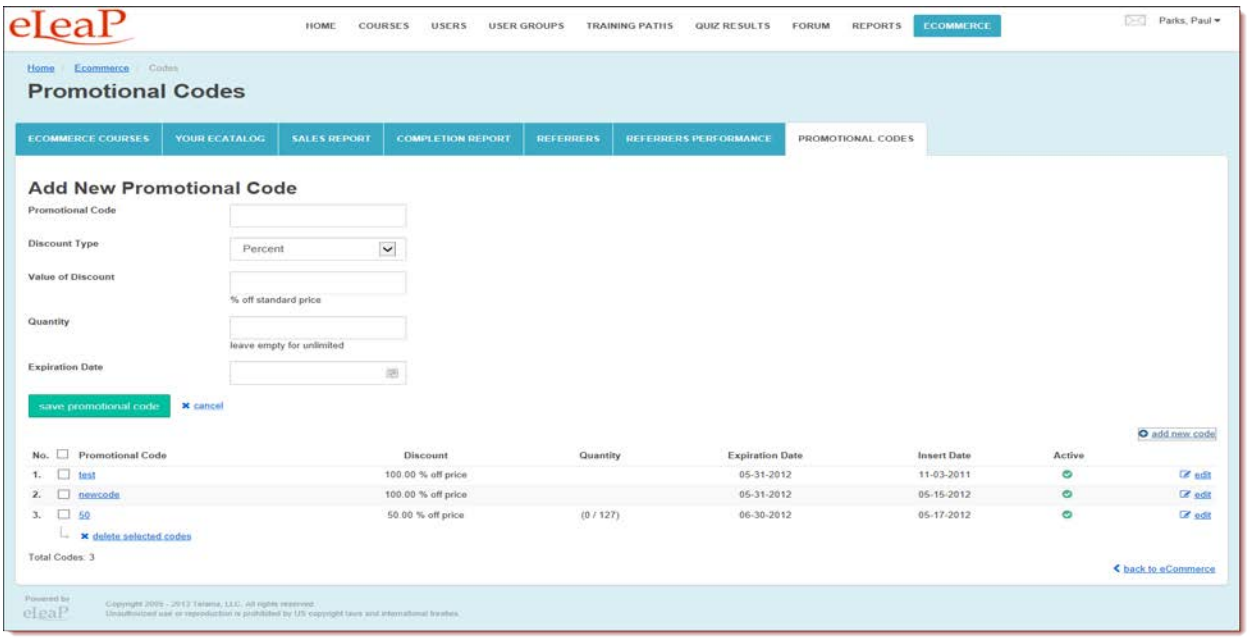
Promotional Codes

Selecting the **PROMOTIONAL CODES** tab within the **ECOMMERCE** group of tabs displays the **Promotional Codes** screen, illustrated below. Each Promotional Code on the **Promotional Codes** list displays the **Promotional Code**, **Discount**, **Quantity**, **Expiration Date**, **Insert Date** and **Active/Inactive** status details for that Promotional Code.



Adding a Promotional Code

Selecting the **add new code** link on the **Promotional Codes** screen displays the **Add New Promotional Code** screen, as shown in the following illustration. Use the steps below to successfully add a Promotional Code to the system.



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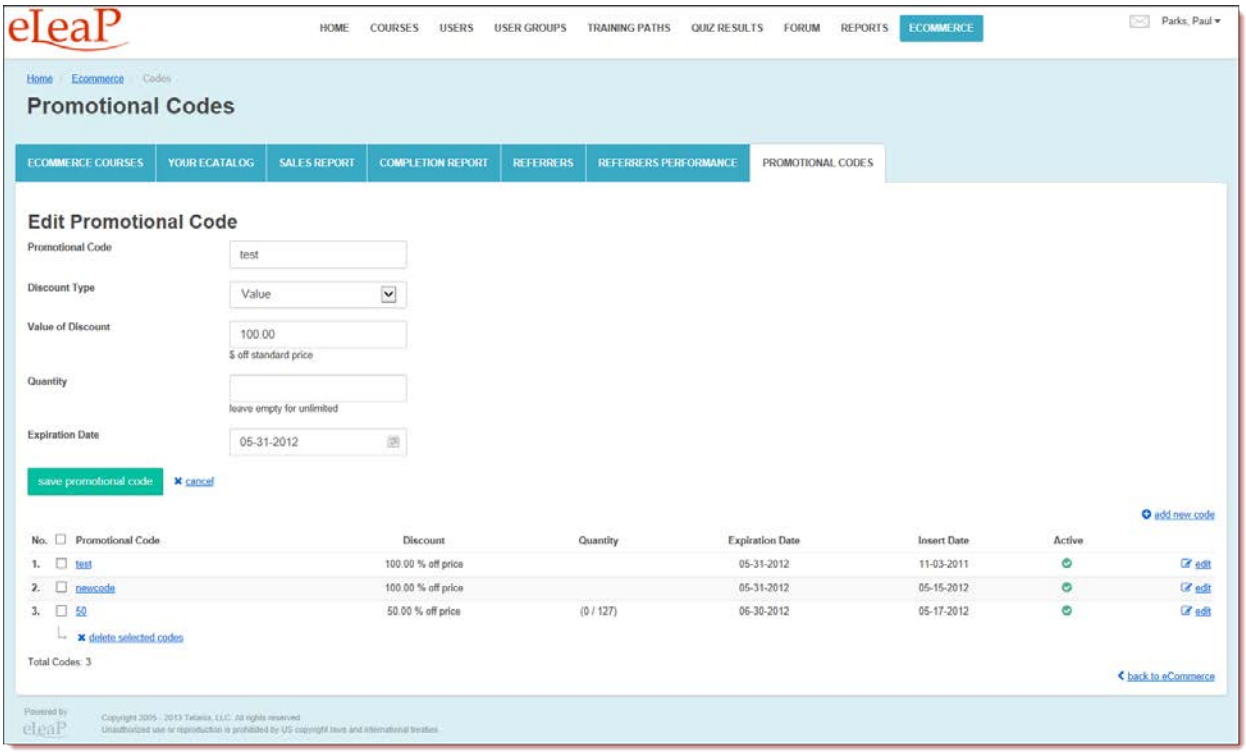
1. Enter a name for the new Promotional Code in the **Promotional Code** field.
2. Select a Discount Type for the new Promotional Code from the **Discount Type** list.
3. Enter a percentage value within the **Value of Discount** field to indicate the percentage off the standard price that the discount promises.
4. Enter a quantity amount within the **Quantity** field, if applicable, and leave this field empty if the quantity is unlimited.
5. Enter an Expiration Date within the **Expiration Date** field, either by entering that date manually or by using the **Calendar** icon to display the Calendar for selecting the date.
6. Click save promotional code to save the new Promotional Code to the system.

Editing a Promotional Code

Clicking the edit link for a line on the Promotional Code list displays the Edit Promotional Code screen, as shown in the illustration below. Simply make any modifications to the Promotional Code, Discount Type, Value of Discount, Quantity and/or Expiration Date settings for the Promotional Code, and then click save promotional code to save your changes to the system.



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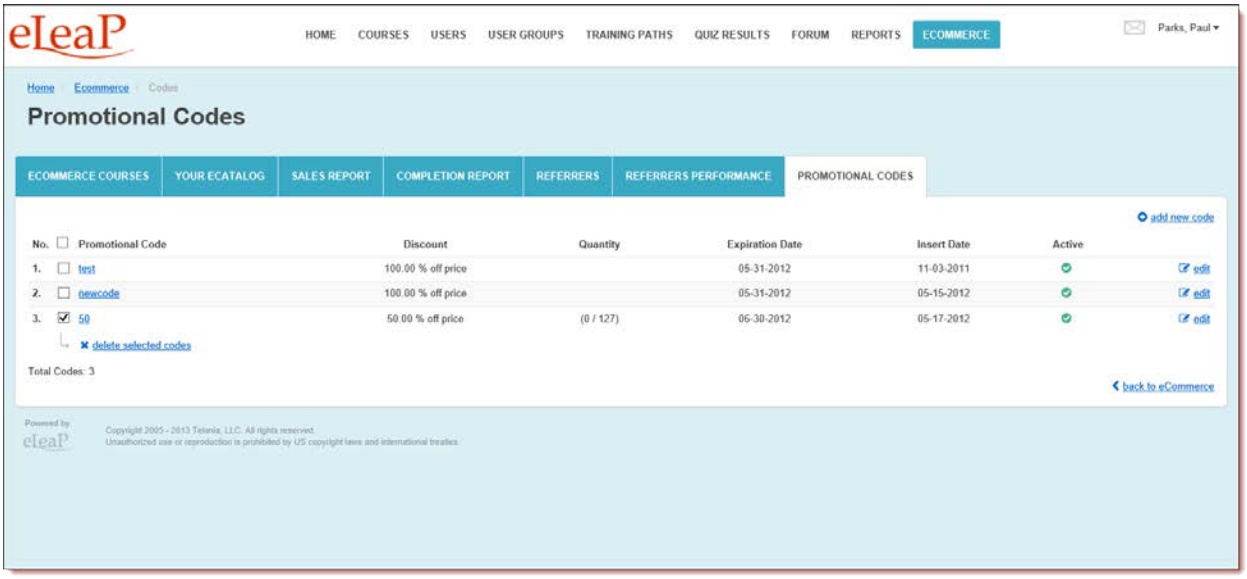
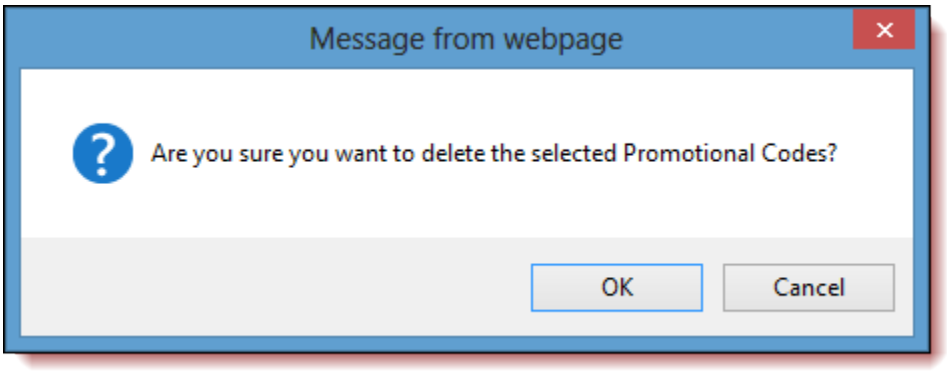
Deleting a Promotional Code

Selecting the check box for a Promotional Code on the **Promotional Codes** list and clicking the **delete selected codes** link, as shown in the following illustration, will remove a Promotional Code from the system.



As shown in the following illustration, the system displays a warning message before proceeding with the deletion, to ensure that is your intention. Click OK to proceed with the deletion or click Cancel to cancel the deletion process.



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Support/Help Center and eLeaP™ Knowledgebase

eLeaP™ has an incredibly helpful online support center. To access support and help 24 hours a day, go to http://support.eleapsoftware.com.

At the Support Center, you can:

- **Access our eLeaP Knowledgebase**: This is a specialized library of articles and reports and powerful how-to tips on how to maximize your eLeaP learning and training system.
- **Submit-a-Ticket**: Do you have a particular question or need help with a feature in eLeaP? Submit a ticket to our helpful staff and you will receive answers. This is an incredibly useful feature. We encourage you to make good use of it.
- **Downloads**: If you need special reports, White Papers or even user guides or manuals, access our Downloads section to get this material.
- **Troubleshooter**: Step-by-step tour to find help for your problems.
- **News**: Visit our news section to learn about latest happenings in eLeaP and our parent company Telania, LLC. You can also access our blog at www.eleapsoftware.com/blog to learn more about the world of eLeaP™.

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