



Administrator's Manual

Included Credentials Module

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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 (LMS) takes the headache out of organizing training and enables your organization to make big financial savings. eLeaP gives you exactly what you need, at a price that you can afford, and with a level of support and accessibility unparalleled in this industry.

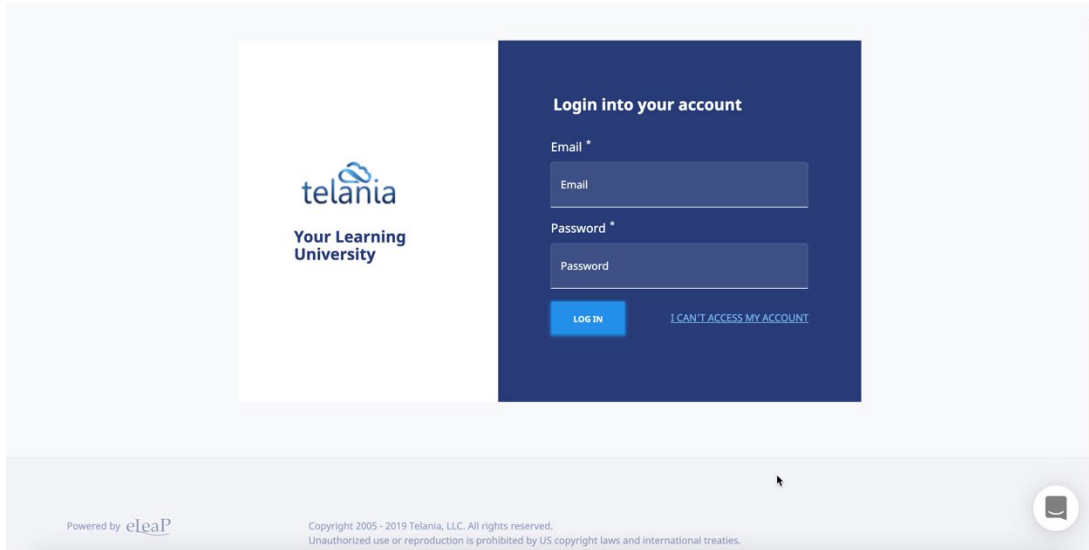
The eLeaP LMS empowers you to rapidly and easily create intuitive online learning courses from your own existing files. With eLeaP online learning software, you can incorporate PowerPoint, PDF, pictures, audio, video, Microsoft Office, SCORM, and many more file types into your own personalized courses. 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.

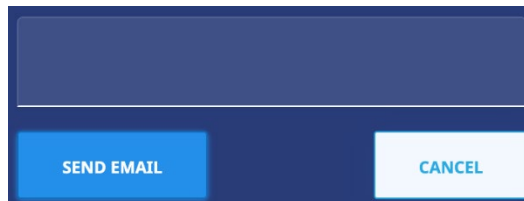
The purpose of this document is to describe all of the functionality within the eLeaP system that an administrator has access to and how the administrator can easily configure this functionality to have the system up and running quickly and efficiently.

Logging into 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 **LOG IN** 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.

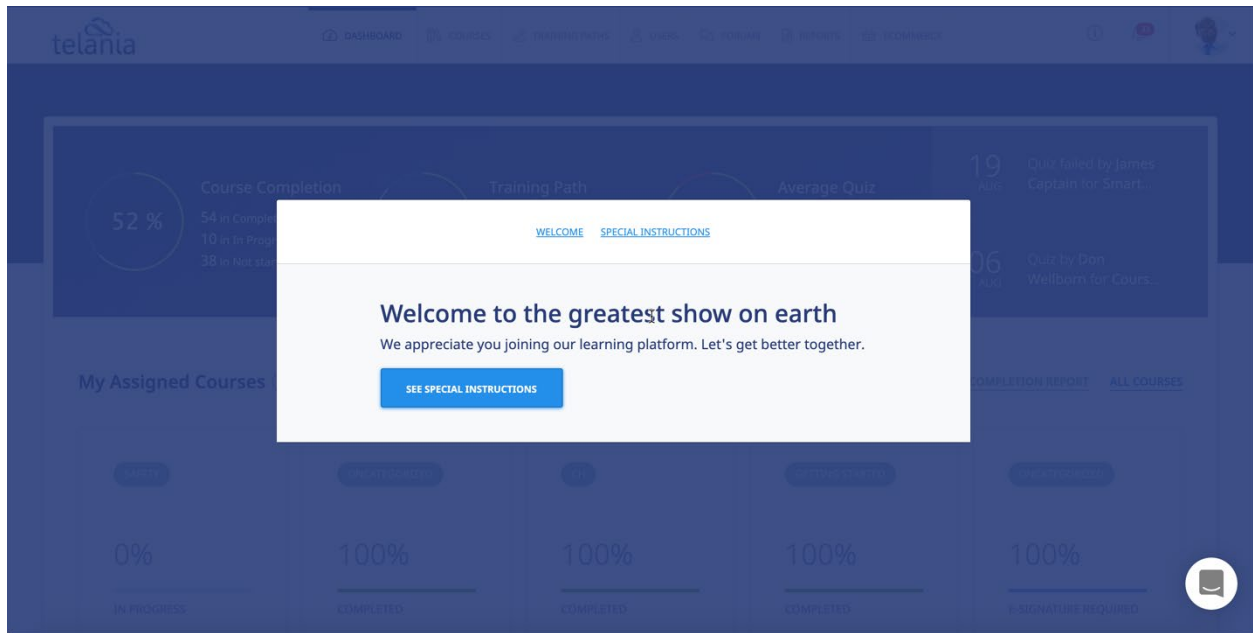


Click the **I can't access my account** link if you forget your password. The **Login** screen expands, displaying a field into which you can enter your email address for retrieval of your password. Once you have entered your email, click [Send Email] button. The system will send you your password reset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

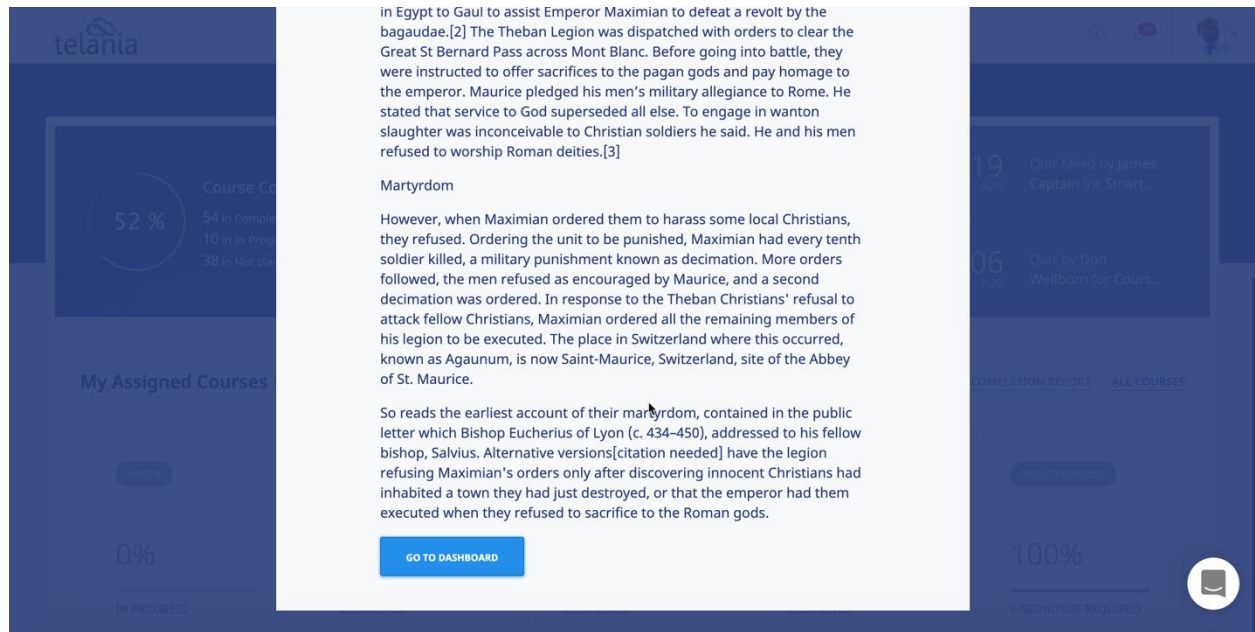


Dashboard and Special Instructions

If logging into the system for the first time, you can see a 'Special Instructions' page if your organization has added specific company-related instructions or information for the company. If special instructions do exist, you might see a page like this:



Note: Users will not be able to close this “Special Instructions” page until they click the [See Special Instructions] button and scroll to the bottom of the page. They will see the option to click to go to their account dashboard.

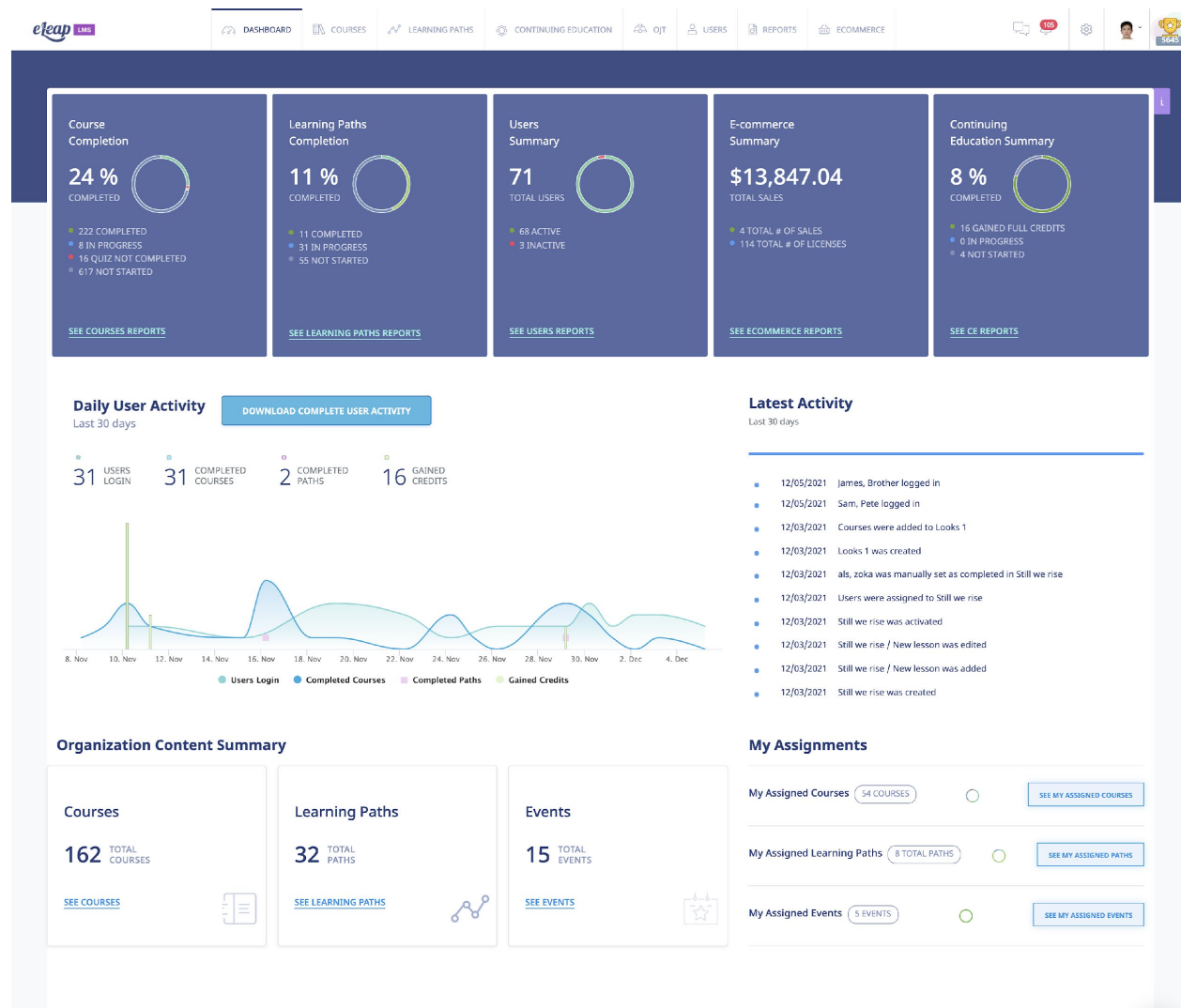


If your organization does not have any special instructions, users simply login directly to their dashboard.

Primary Menu

eLeaP's primary menu items are:

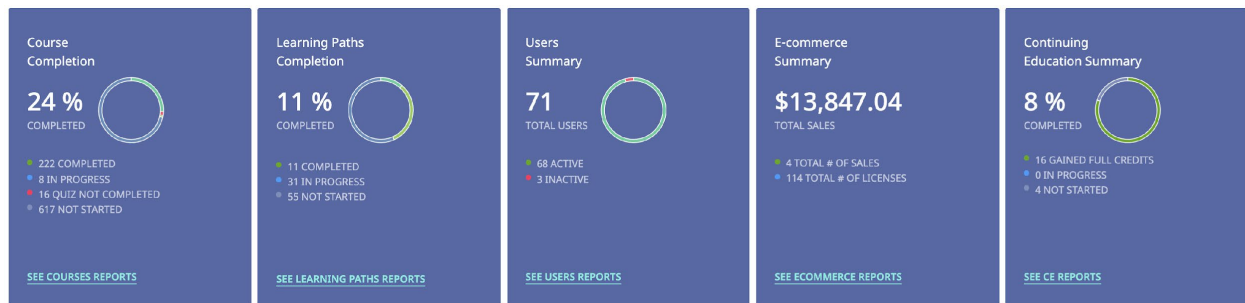
- Dashboard
- Courses
- Learning Paths
- Continuing Education (if activated)
- OJT (if activated)
- Users
- Reports
- eCommerce
- Forum
- Inbox
- Account settings
- Profile
- Gamification



Dashboard Sections

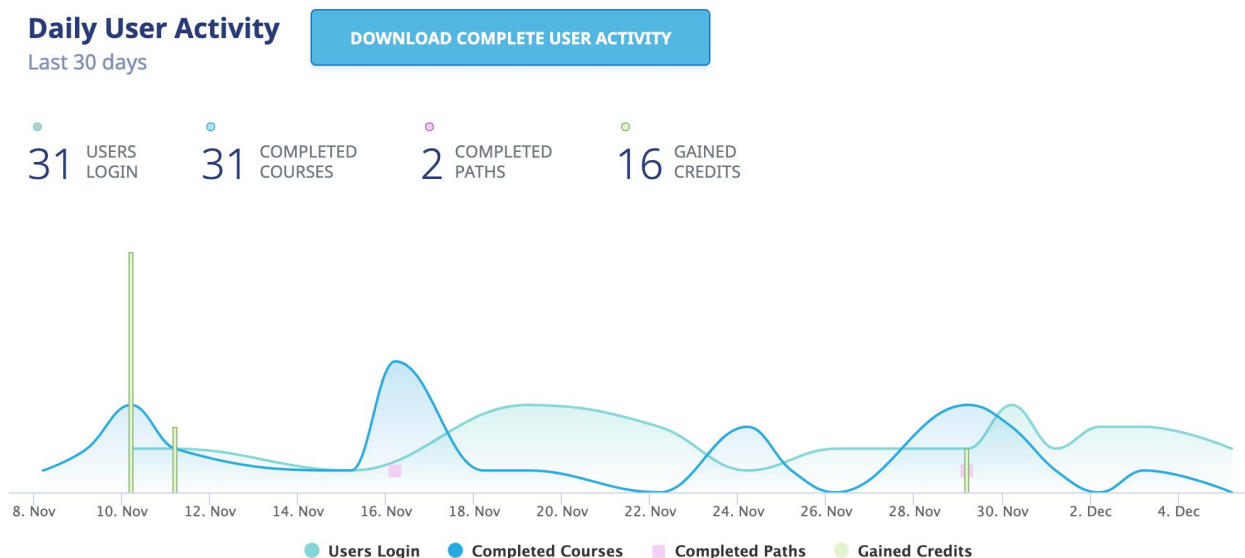
The Dashboard is 5 sections in one. The various dashboard sections are:

Status Tiles



The Status Tiles area displays a visual summary of your account activity in the system. Here, users can see Course Completion, Learning Path Completion, Users Summary, E-Commerce Summary (if available) and Continuing Education Summary (if available). You can click the links to get more details for each Status tile.

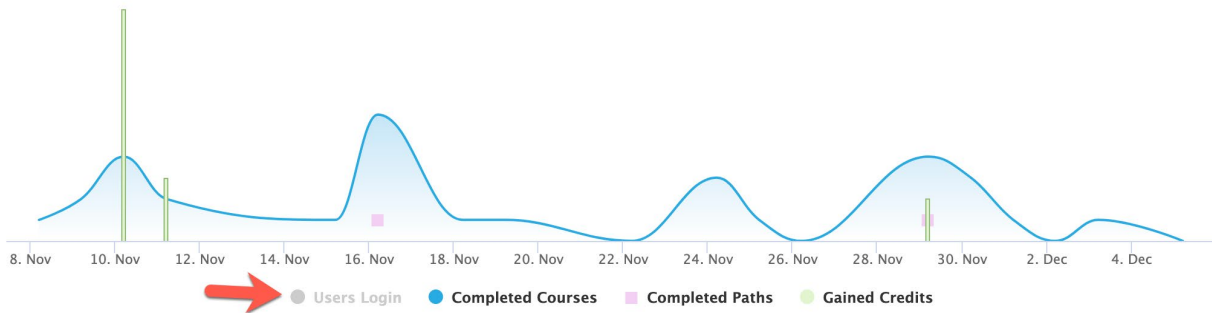
Daily User Activity



The Daily User Activity section includes the [Download Complete User Activity] button for quick account activity downloading. The Daily User Activity section shows 4 vital activities tracked –

- Daily User Logins
- Daily Course Completions
- Daily Learning Path Completions
- Daily Continuing Education Credits gained

You can suppress each of these individual activities so you can focus on specific daily user activities. Simply click on the activities you want to suppress to turn them gray and non-visible in the chart area.



Latest Activity

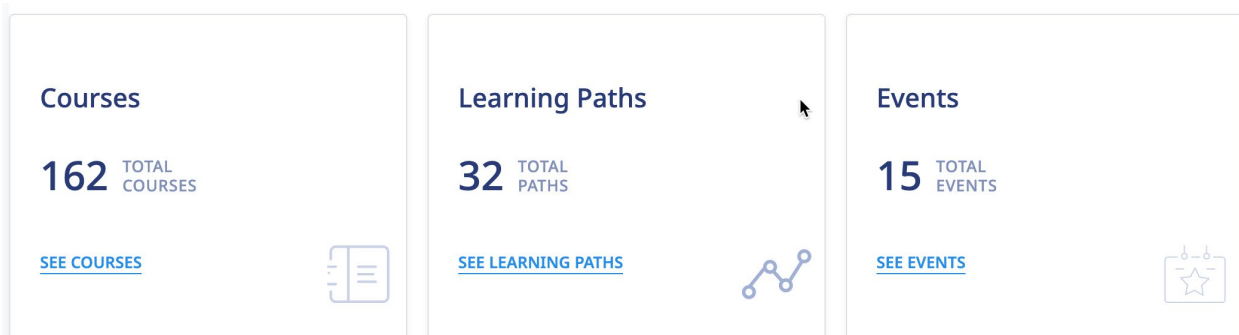
Latest Activity

Last 30 days

- 12/05/2021 James, Brother logged in
- 12/05/2021 Sam, Pete logged in
- 12/03/2021 Courses were added to Looks 1
- 12/03/2021 Looks 1 was created
- 12/03/2021 als, zoka was manually set as completed in Still we rise
- 12/03/2021 Users were assigned to Still we rise

The v5+ also includes the latest account activity logs right on your dashboard. This activity is pulled from your Audit Trail so you can go to your Audit trail to get more details.

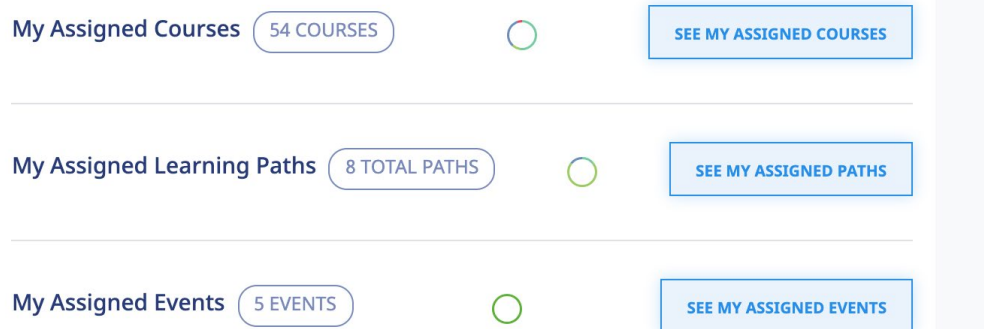
Organization Content Summary



The Organization Content Summary section gives a high-level summary of your content assets created in

the system. This summary includes the total number of Courses, Learning Paths as well as Events created. Click the links to get additional information.


My Assignments




The My Assignments shows your personal assignments as a user in the system. You can also get your course, learning path, or Events assignments from the various sub-menu sections of the system.

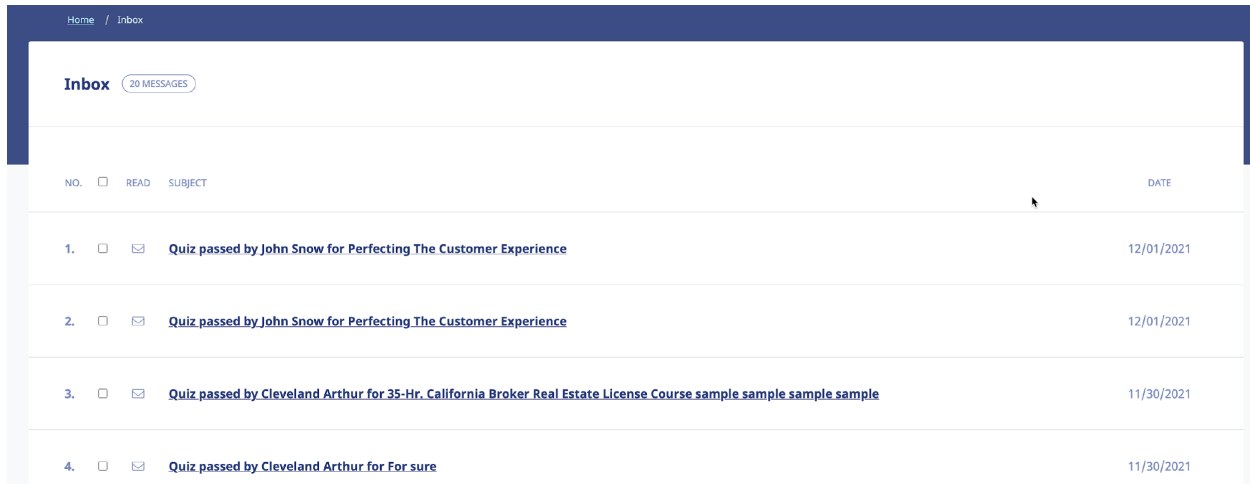
Click the links to get more details on your assignments. The charts also indicate assignment status.

Forum & Inbox (Communication)


The Forum text link is now an icon . Clicking this icon takes you to the Forum section where you can manage your organization-wide Forums as well as participate in assigned Forum categories.

As System Administrator, you can also access your Inbox  to receive updated email notifications and communications regarding various activities in your eLeaP account. You can receive Quiz completion notifications, notifications on Course Assignments, and Pending Deadline notifications.

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 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.

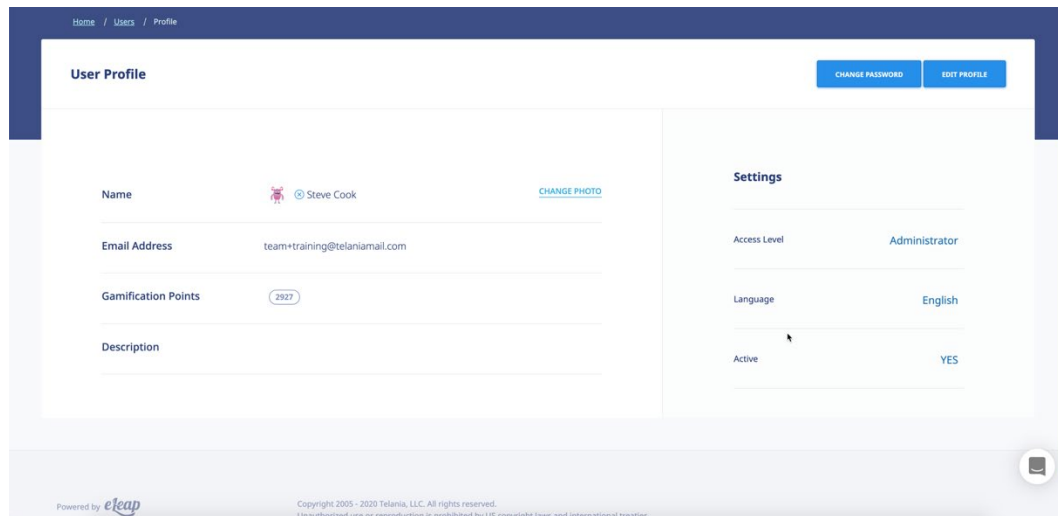


Account Settings

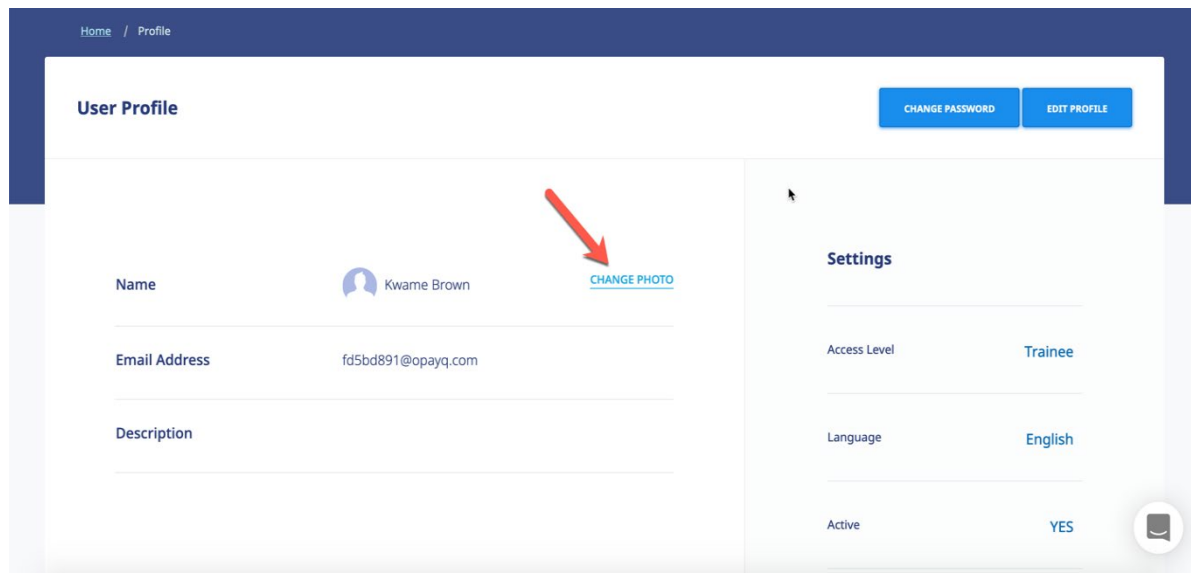
Clicking the gear icon  from your main menu enables you to access your account settings. You can also access this from the dropdown arrow and then click the Company Profile option from there.

Modifying Your Personal Profile

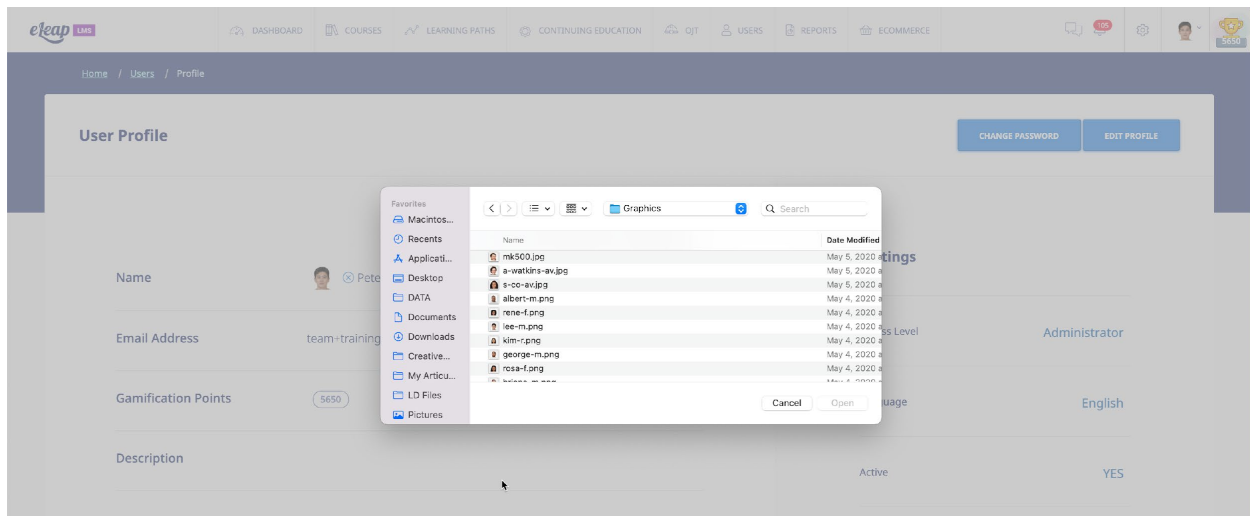
Selecting the **PROFILE** option on the drop-down menu at the upper right-hand corner of the screen, as shown in the following illustration, allows you to modify your Personal Profile information.



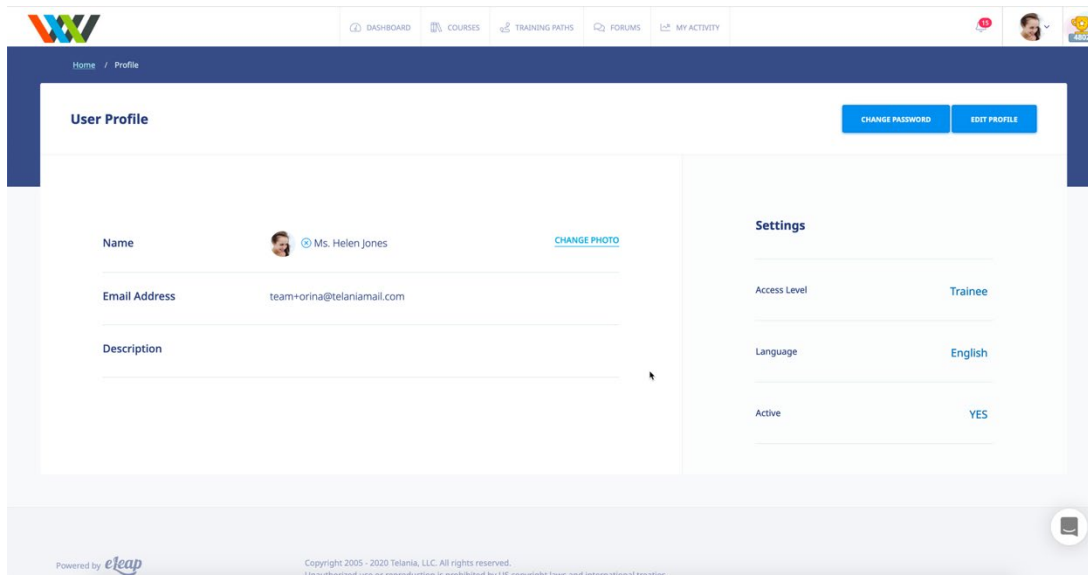
The **User Profile** screen, illustrated below, is displayed. To associate a picture with your Profile, click the **CHANGE** link next to the Name, as shown in the illustration.



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.




Edit Profile

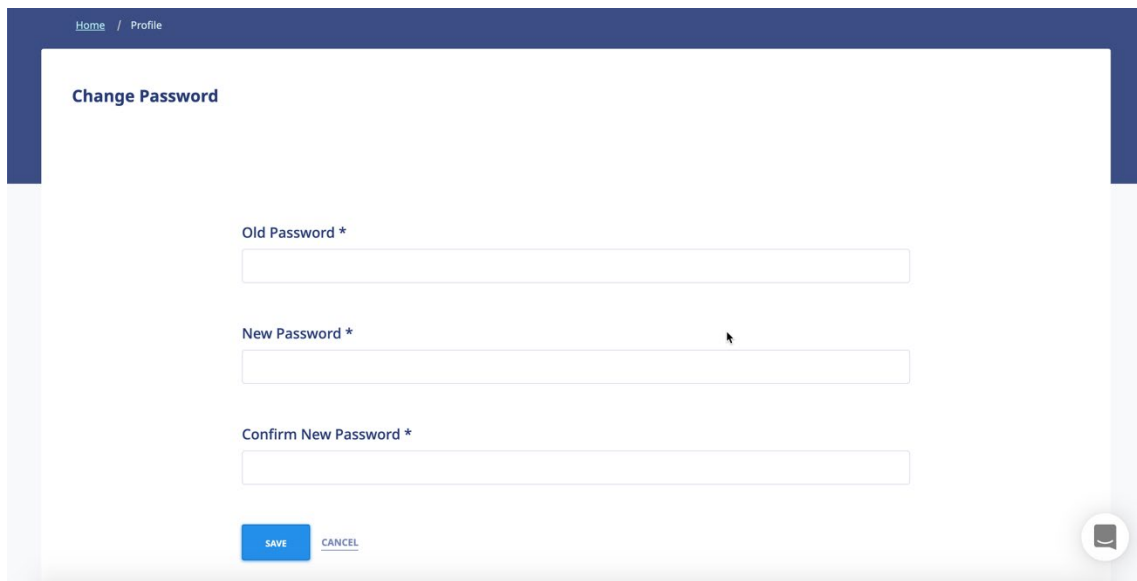


To edit your Profile Details, select the **EDIT PROFILE** button located in the right-hand section of the screen. The **Edit User Profile** screen, illustrated below, is displayed. Make any modifications necessary within the **Title, First Name, Middle Name, Email, Description, Access Level, Language**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

Changing Your Password

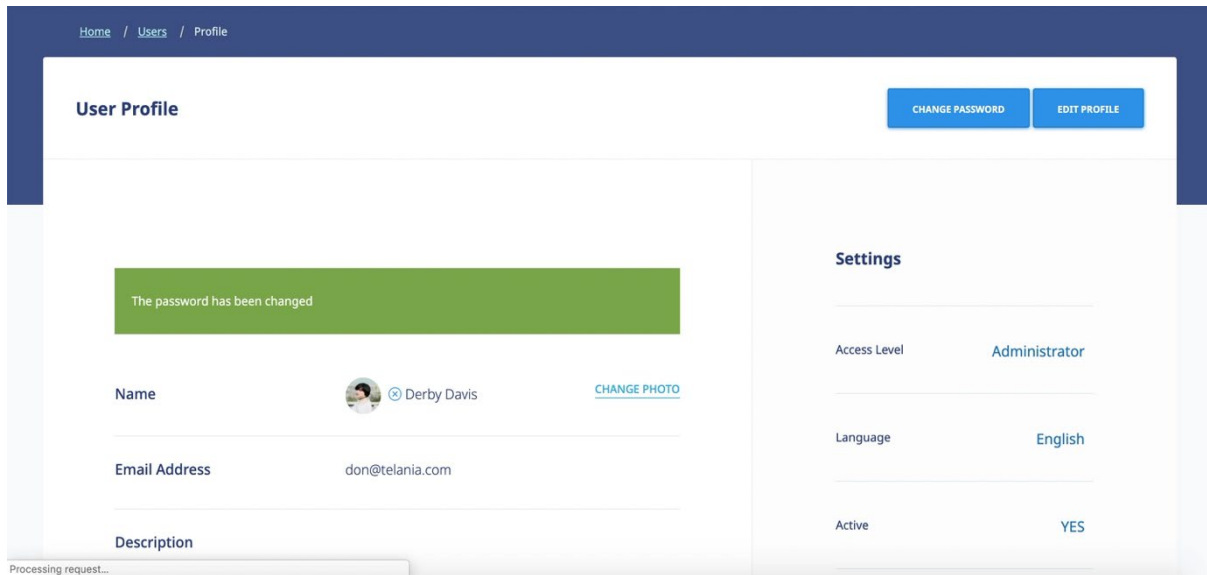
Clicking the **CHANGE PASSWORD** button allows you to reset your password. As shown in the following illustration, the **Change Password** screen is displayed. Enter your old password in the **Old Password** field, enter your new password in the **New Password** field, re-enter the new password in the **Confirm**

New Password field, and then click .




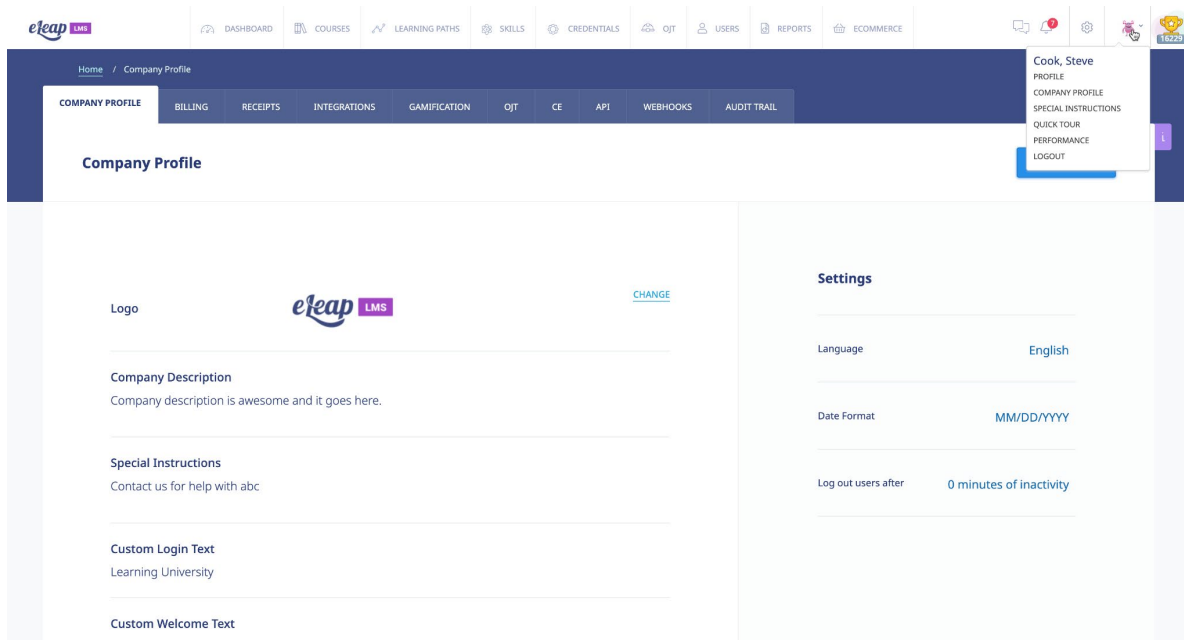
The screenshot shows a web interface for changing a password. At the top, there is a dark blue header bar with the text "Home / Profile". Below this, the main content area has a title "Change Password". There are three input fields, each with a label and an asterisk: "Old Password *", "New Password *", and "Confirm New Password *". Each field is represented by a white rectangular box. At the bottom left of the form, there are two buttons: a blue "SAVE" button and a grey "CANCEL" button. At the bottom right, there is a small circular icon containing a speech bubble.

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. You can also click the gear icon  in the primary menu section to access this page.



The **Company Profile** screen, illustrated below, is displayed. This screen consists of five or six tabs (depending on account type): **Company Profile** (displayed by default), **Billing**, **Payment Profiles**, **Receipts**, **Invoices**, **Integrations**, **Gamification**, **OJT**, **CE**, **API**, **Webhooks** and **Audit Trail**. Clicking the **EDIT PROFILE** button, located in the right-hand side of the screen, allows you to modify the **Company Info**, **Instructions**, **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 in the upper left-hand corner of the screen.

Home / Company Profile

COMPANY PROFILE BILLING RECEIPTS INTEGRATIONS GAMIFICATION OJT CE API WEBHOOKS AUDIT TRAIL

Company Profile EDIT COMPANY

Logo [CHANGE](#)

Company Description
Company description is awesome and it goes here.

Special Instructions
Contact us for help with abc

Custom Login Text
Learning University

Custom Welcome Text

Settings

Language English

Date Format MM/DD/YYYY

Log out users after 0 minutes of inactivity

Editing Your Profile Fields

As mentioned above, clicking the **EDIT COMPANY** button 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.

Edit Company Profile

Company Info

Company description is awesome and it goes here.

Instructions

Contact us for help with abc

Custom Login Text

Learning University

Custom Welcome Text

Custom Welcome Text

Date format

MM/DD/YYYY

Language

English

Notification email

Notification email

Skill menu name


Skills

Logout users after

0 minutes of inactivity (set 0 to disable)

Activate Two-Factor Authentication ☒

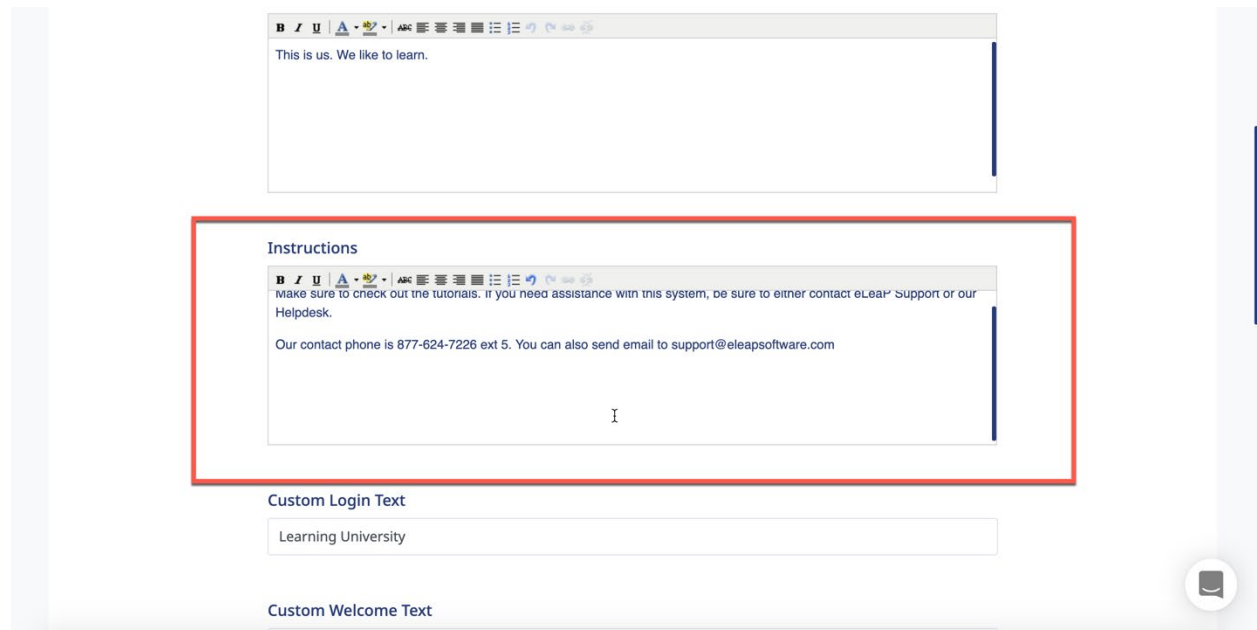
1. Use the **Company Info Editor** to add information about your Company.
2. Use the **Instructions Editor** to add Instructions.
3. Make a different selection on the **Date format** list to use one of the other available date formats.
4. Use the **Language** dropdown to select the default language for your account.
5. Change the Email Address within the **Notification email** field to change the address to which Notification Emails will be sent.

6. Customize [Skills] menu name for your main menu section.
7. Auto Logout for inactivity can also be set using the **Logout users after** field. Simply indicate the number of minutes of inactivity the system should set before it logs inactive users out.
8. Activate Two-Factor Authentication for your account.
9. Click  to save your changes to the system.

Special Instructions

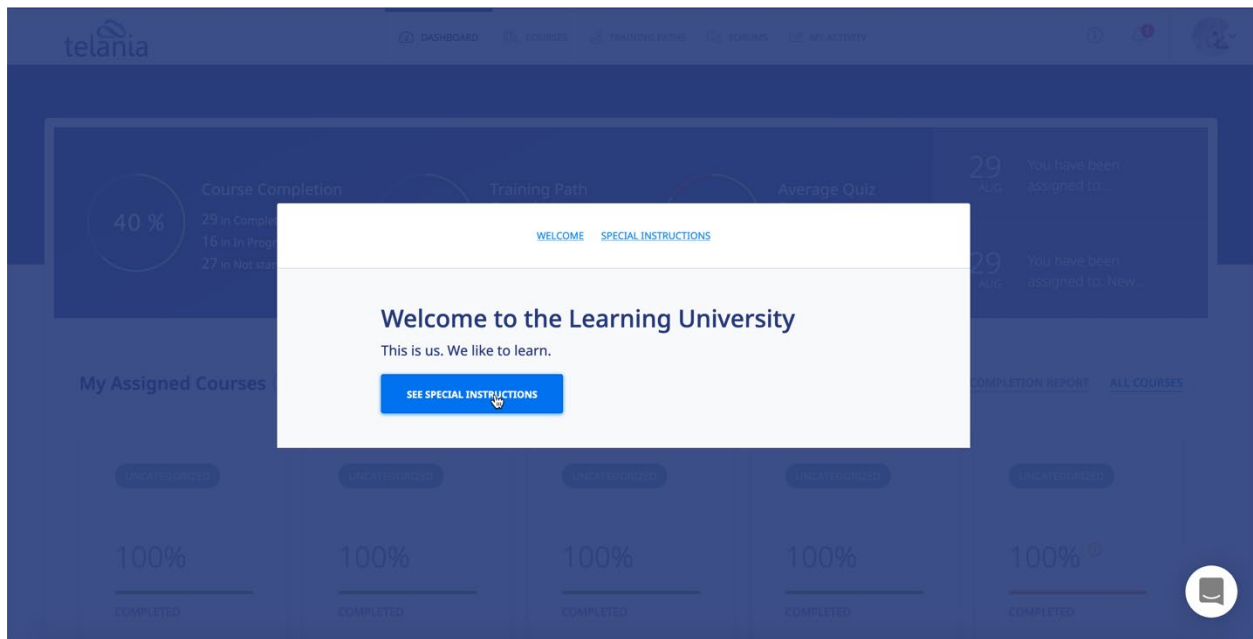
eLeaP V5 has an option to show important company instructions to users when they first log into the system as well as when they click on the **SPECIAL INSTRUCTIONS** dropdown from their profile area.

To add Special Instructions, click the  button and go to the [Instructions] section



The screenshot displays the 'EDIT COMPANY' interface. At the top, there is a text area with the placeholder 'This is us. We like to learn.' Below this, the 'Instructions' section is highlighted with a red rectangular border. It contains a rich text editor with the following text: 'make sure to check out the tutorials. if you need assistance with this system, be sure to either contact eLeaP Support or our Helpdesk. Our contact phone is 877-624-7226 ext 5. You can also send email to support@eleapsoftware.com'. Below the 'Instructions' section, there are two text input fields: 'Custom Login Text' with the value 'Learning University' and 'Custom Welcome Text'.

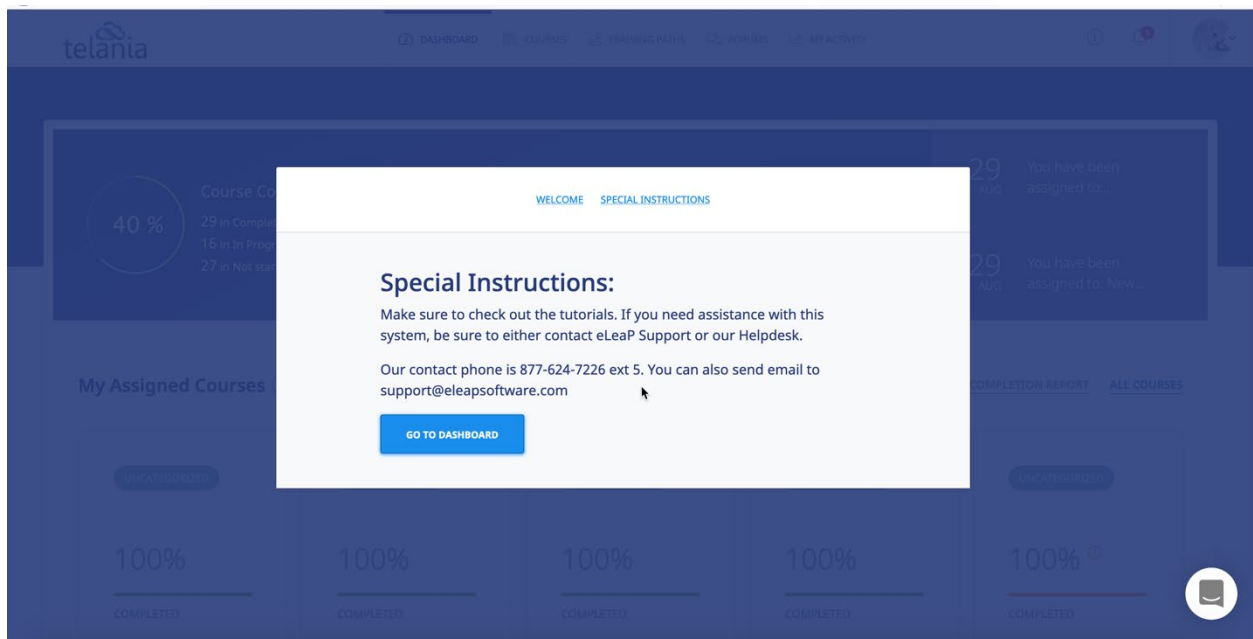
From the Trainee's view, the Special Instructions looks like:



Clicking on the

SEE SPECIAL INSTRUCTIONS

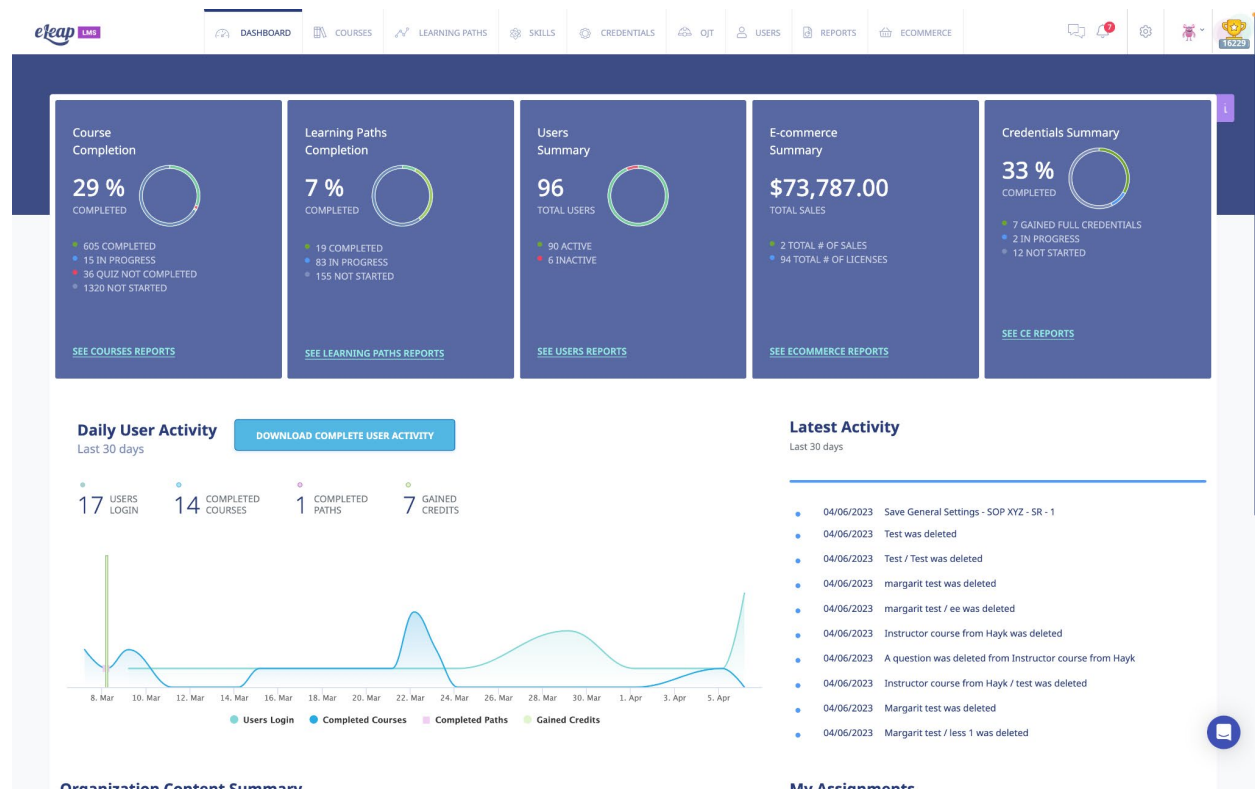
displays this screen



Clicking on

GO TO DASHBOARD

take the user to their dashboard



Auto Logout Time

eLeaP has an auto logout feature for companies who need to comply with 21 Part 11 and other compliance regulations. By default, the auto logout is set at 0 or unlimited. Changing this number activates the auto logout feature.

For example, if you want to set an auto logout setting for 60 minutes, this is how:

The screenshot shows a configuration form for the auto logout feature. It includes a label "Logout users after", a text input field containing "0", and a description "minutes of inactivity (set 0 to disable)". Below the input field are two buttons: "SAVE" and "CANCEL".

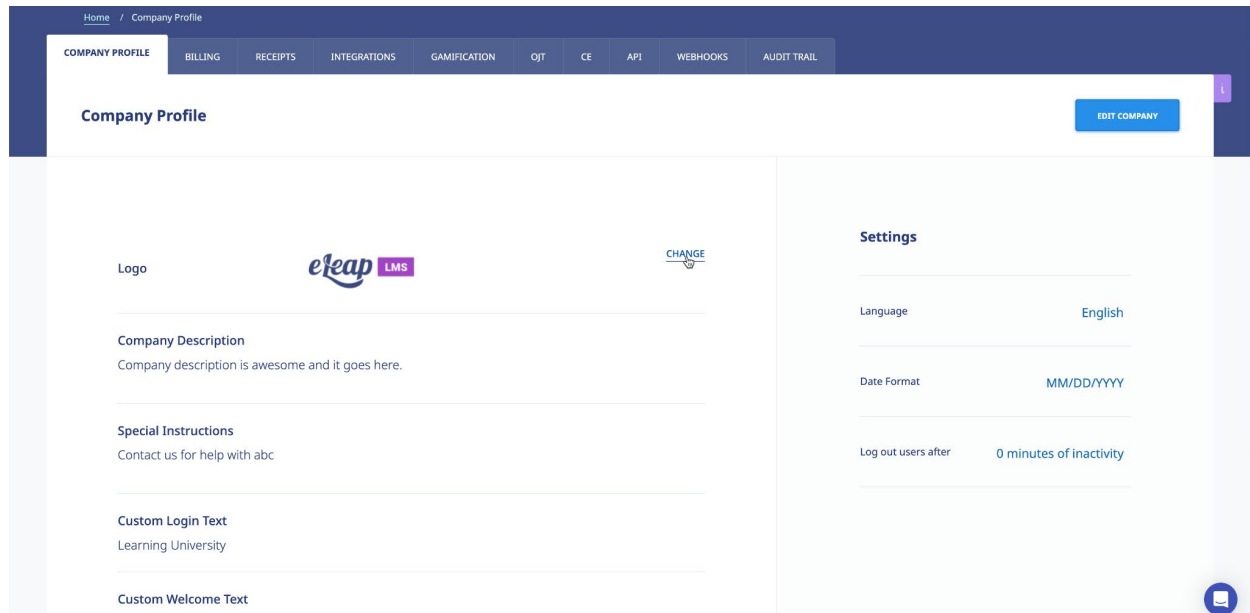
Note that for auto logout to work, the users must maintain inactivity for the duration of the auto logout time frame. Moving their cursor resets the clock.

Uploading your Company Logo

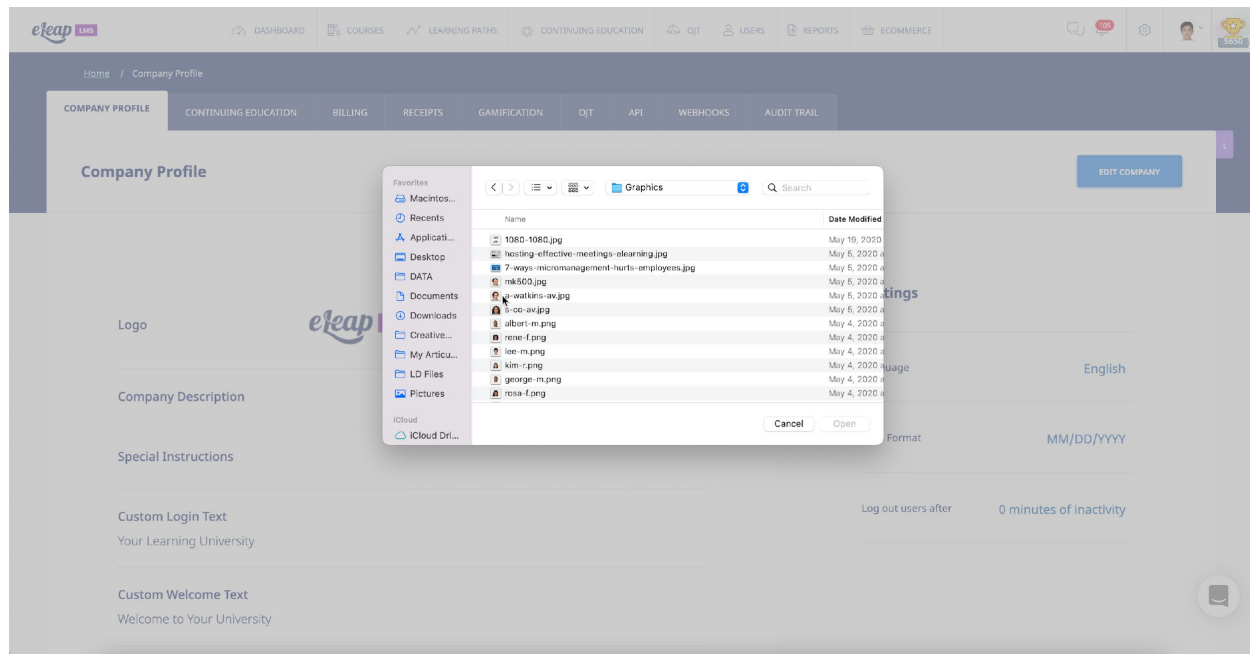
Clicking the **CHANGE** button on the **Company Profile** screen allows you to incorporate your company

eLeaP Administrator's Manual (V5+CEM)

logo into your instance of the eLeaP application.



As shown in the following illustration, the **Company Pro** file screen expands to include an **Upload File** portion of the screen.



Simply navigate or browse to the location of your organization's logo file on your computer. Select the

eLeaP Administrator's Manual (V5+CEM)

logo file and click

Open

Credentials [Management]

Selecting the [CE] tab in the Company Profile area will enable you to manage the various types of CEUs available to your organization and users.

Continuing Education (CE) Types			
Continuing Education Unit		3 COURSES	DELETE EDIT
Continuing Professional Education		7 COURSES	DELETE EDIT
Continuing Medical Education		1 COURSES	DELETE EDIT
Continuing Education		5 COURSES	DELETE EDIT
Continuing Legal Education		COURSES	DELETE EDIT

Your account will be pre-loaded with the 5 types of CEUs above. However, you can edit, delete, or add more CE types to your account. You can also see how many CE courses you have associated with each type of CEU.

Once you have your CE types set up the way you want, go to your [COURSES] menu to add or associate specific courses with the various CE types.

Billing

Selecting the **BILLING** tab on the **Company Profile** screen displays the **Billing** screen, as shown in the illustration below. Select the appropriate billing level to suit the needs of your organization.

Billing

Your current plan: Demo

\$0.00 / month

Included users: 0
Extra user (1 - 5): \$0.00
Disk space: 25 MB
Tech support: 24/7

If your needs change, you can always upgrade or downgrade your plan:

Plan	Price / month	Included users	Extra user (1 - 5)	Disk space	Tech support
Basic 25	\$125.00	25	not available	650 MB	24/7
Medium 100	\$129.00	26	(27 - 100): \$2.50	unlimited	24/7
Medium 300	\$314.00	101	(102 - 300): \$2.00	unlimited	24/7
Large 500	\$712.50	301	(302 - 500): \$1.50	unlimited	24/7
Large 1000	\$1,012.50	501	(502 - 1000): \$0.70	unlimited	24/7
Extra 1000	\$1,361.80	1001	(1002 - 6000): \$0.40	unlimited	24/7
Extra 6000	\$3,012.90	6001	unlimited	unlimited	24/7

Once you select the appropriate usage level, you will be able to process payment online and send offline payment in the form of a check or another means. In the example below, I select the [Basic 25] level and got this credit card payment screen.

Home / Company Profile / Billing / Process Payments

Process Payment

Amount to be processed: \$125.00

You don't currently have a payment profile. Add your credit card details below to create a payment profile.

Card Number *

Expiration Date * 01 / 2020

CVV *

ADD CREDIT CARD

Authorize.Net SecureTrust

If you would like to **download** a price list, [click here](#). Feel free to use the Bookmark function in your

browser to bookmark this location to always have access to this information.

Invoices/Receipts

Selecting the **INVOICES (or RECEIPTS)** tab on the **Company Profile** screen displays the **Invoices/Receipts** screen, illustrated below. This screen will show all of your payments received on the **Invoices/Receipts** list. To download your invoice or receipt, click the associated Download link.

Invoices						
NO.	NUMBER	CONTENTS	AMOUNT	DATE	STATUS	DOWNLOAD
1.	28654290	subscription for 05/09/2020 to 06/08/2020	\$500.00	\$500.00	2020-05-09	PAID Download
2.	28654194	subscription for 04/09/2020 to 05/08/2020	\$500.00	\$500.00	2020-04-09	PAID Download
3.	28654104	subscription for 03/09/2020 to 04/08/2020	\$500.00	\$500.00	2020-03-09	PAID Download
4.	28654019	subscription for 02/09/2020 to 03/08/2020	\$500.00	\$500.00	2020-02-09	PAID Download
5.	28653934	subscription for 01/09/2020 to 02/08/2020	\$500.00	\$500.00	2020-01-09	PAID Download
6.	28653849	subscription for 12/09/2019 to 01/08/2020	\$500.00	\$500.00	2019-12-09	PAID Download

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

PAID

telania | eLeaP

Date: 2020-05-09
Number:

INVOICE

Service provider
Telania, LLC.
1300 S. Fourth Street, Suite 350,
Louisville, KY 40208
USA

Buyer

No.	Description	Amount
1.	subscription for 05/09/2020 to 06/08/2020	\$500.00
TOTAL:		\$500.00

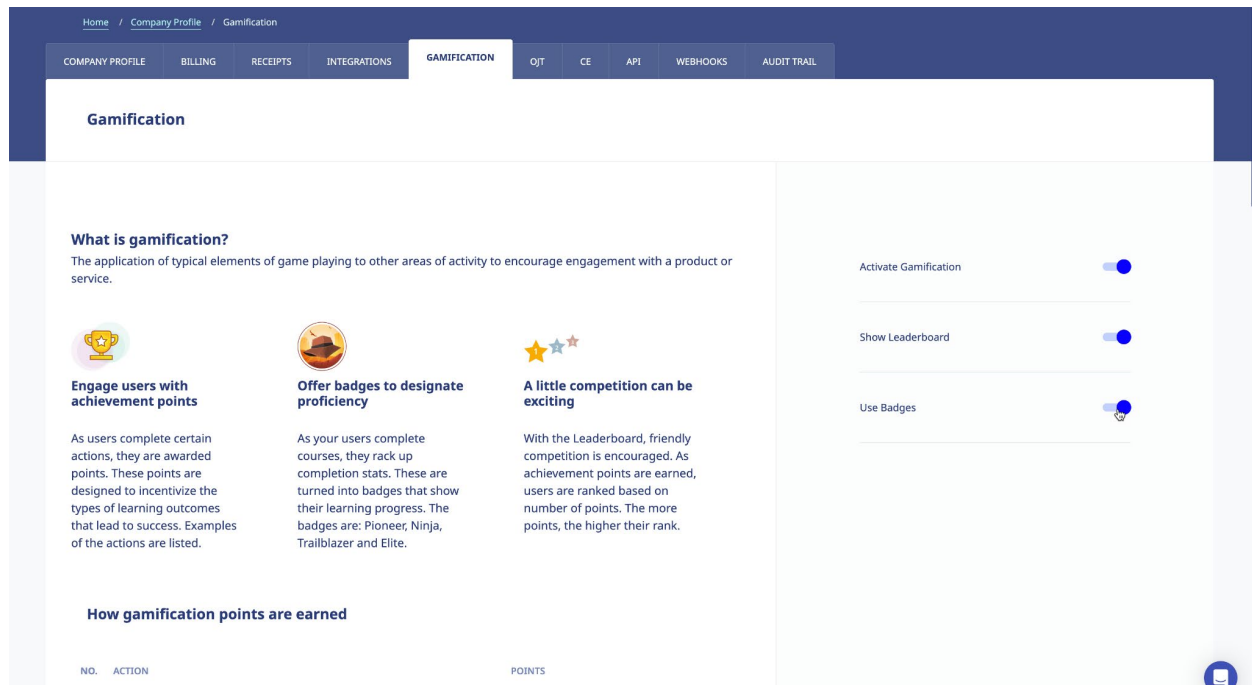
Gamification

What is gamification?

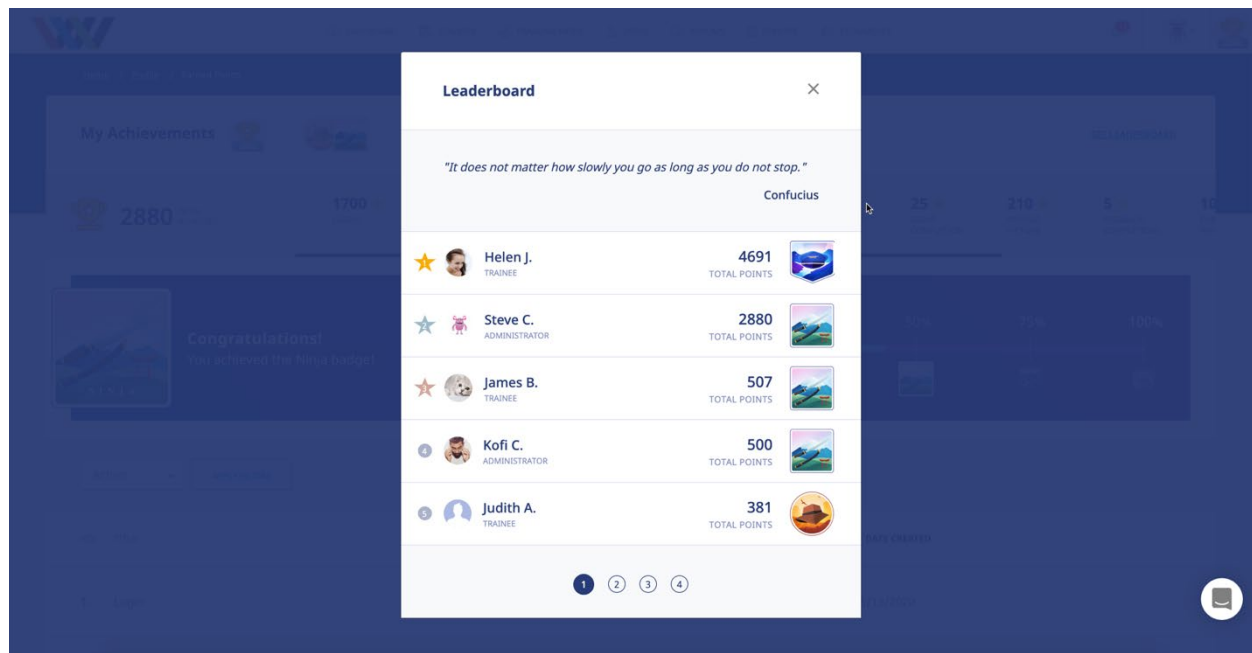
The application of typical elements of game playing to other areas of activity to encourage engagement

with a product or service.

You can activate/deactivate the Gamification options from your Gamification tab.



Leaderboard: Toggle the Leaderboard setting to enable the Leaderboard to be displayed to all users.



Badges: Badges are optional in Gamification. You can toggle the badges option to enable users to earn

badges.

Home / Profile / Earned Points

My Achievements

[SEE LEADERBOARD](#)

16229 TOTAL ACHIEVED

10535 LOGINS

1325 COURSE COMPLETIONS

75 O/C COURSE COMPLETIONS

690 QUIZ COMPLETIONS

1190 LESSONS VIEWED

4 DISCUSS COMMENTS

2 DISCUSS TOPICS

1950 CERTIFICATES EARNED

50 EVENT COMPLETION

2 PI

Trailblazer

Congratulations!
You achieved the Trailblazer badge!

Completed courses
See how your courses progress helps you achieve badges

0 25% 50% 75% 100%

Action **From - To** **APPLY FILTERS**

NO.	TITLE	POINTS	DATE CREATED
1.	Spelling Smart	10	03/22/2023
2.	Customer Service 101	25	03/22/2023
3.	SOP for Medical Device : DUPLICATE : DUPLICATE	25	01/29/2023

How gamification points are calculated is also available on this page.

OJT (On-the-Job Training)

Selecting the OJT tab in the Company Profile screen enables you to set up and manage your OJT module.

COMPANY PROFILE BILLING RECEIPTS INTEGRATIONS GAMIFICATION **OJT** CE API WEBHOOKS AUDIT TRAIL

On-the-Job Training

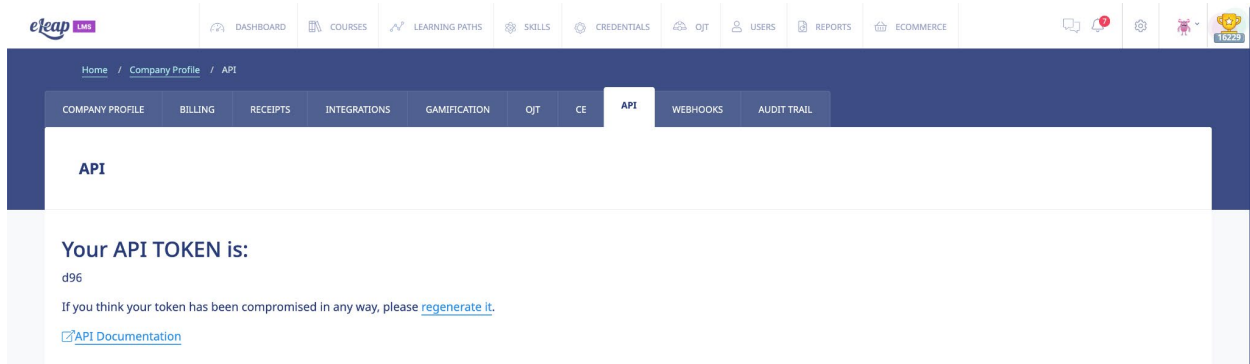
Activate On-the-Job Training ☒

OJT Fields
These fields will appear in the OJT tables , besides the user name, date and number of hours. This order needs to be in sync with your csv / xls file that you will use for bulk imports [Find our more here.](#)

FIELD NAME	USE AS FILTER
<input checked="" type="checkbox"/> Skills Dev	<input checked="" type="checkbox"/>
<input type="checkbox"/> Quality Control	<input type="checkbox"/>
<input type="checkbox"/> Problem Solving	<input type="checkbox"/>
<input type="checkbox"/> InService	<input type="checkbox"/>
<input type="checkbox"/> Training	<input type="checkbox"/>

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.

trainingprovider.2leap.com says

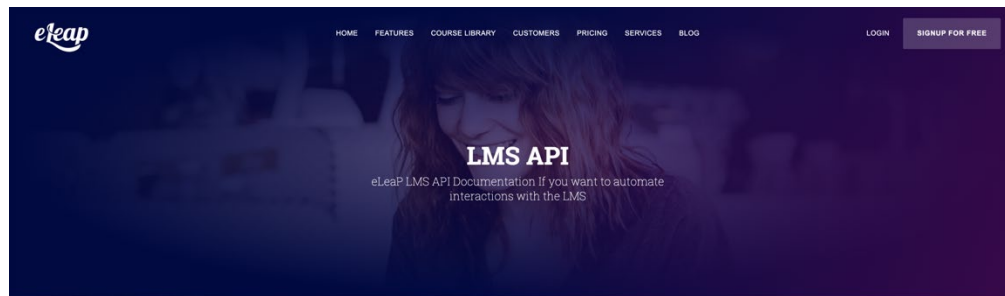
Are you sure? You will need to replace the token with the new one in your application.

Cancel

OK

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 online or click the **DOWNLOAD API USER Guide** link to download it to your computer.

eLeaP Administrator's Manual (V5+CEM)



[Methods](#)
[> Users](#)
[> User Groups](#)
[> Training Paths \(previously Career Paths\)](#)
[> Courses](#)
[Error codes](#)
[Requests limits](#)
[Message examples](#)
[Download API User Guide](#)

Overview

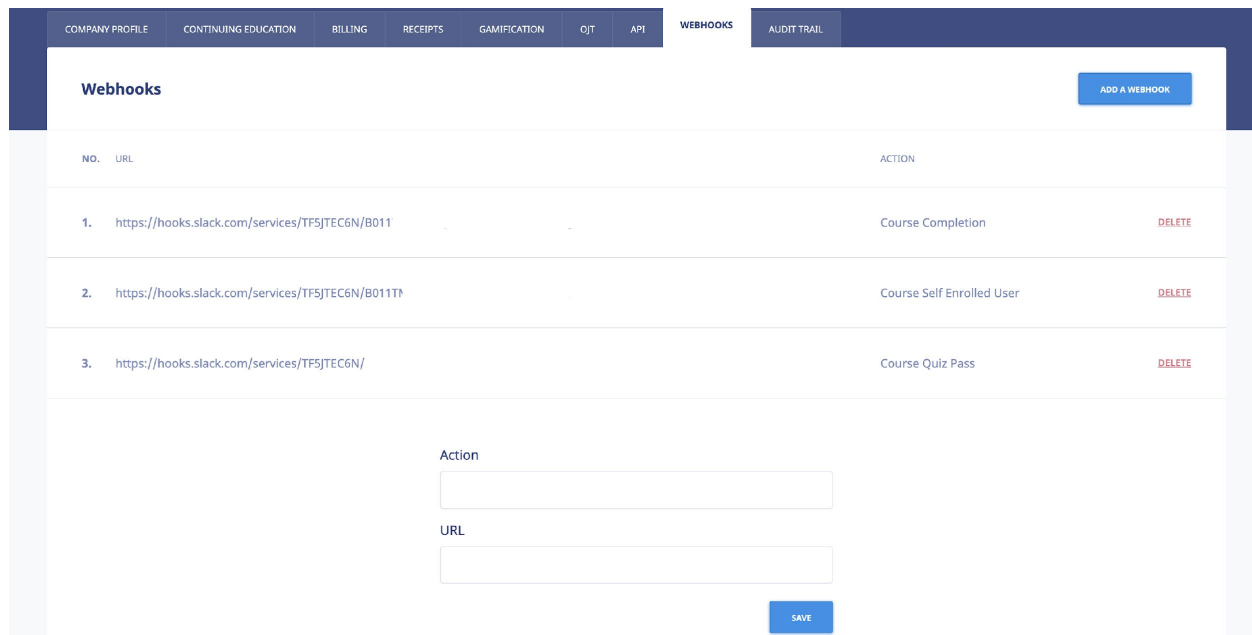
The eLeaP API consists of a set of callable methods. To perform an action using the API, send a request to an API endpoint and a response will then be sent back to you. If you don't have an API account, [contact eLeaP](#) to register and activate your API account.

The request can either be GET or POST. We recommend you use POST requests.

The response you'll get will be a [JSON](#) encoded object.

Webhooks

Webhooks are one of a few ways web applications can communicate with each other.



The eLeaP™ Learning Management Software system has webhook integration which allows sending real-time data as a notification or message from one application to another whenever a given event occurs or action is performed.

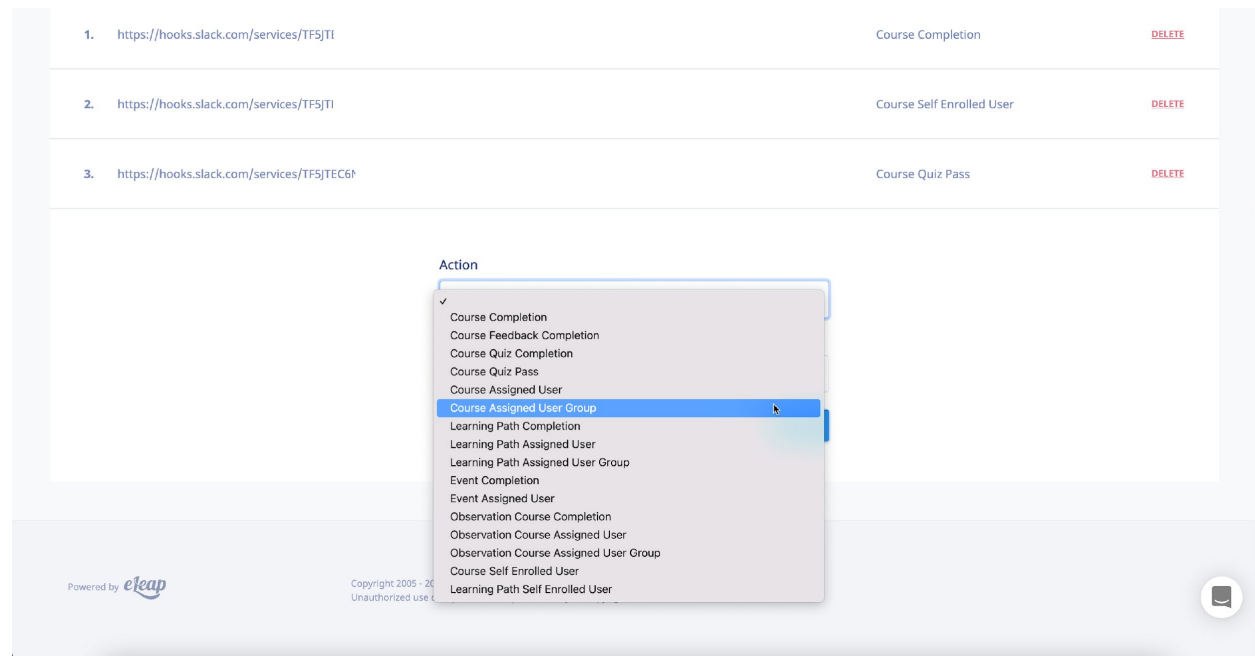
You can now create, configure, and manage more than one Webhook in eLeaP™. This means any actions captured on your eLeaP LMS page can be sent off to multiple custom integrations (including Slack)

How to set up webhooks on eLeaP LMS

Go to the COMPANY PROFILE from the dropdown next to the user's avatar which is at the top- right side of the page.

Click the WEBHOOKS tab

To create a new webhook notification the admin needs to choose an action from the dropdown and add the Webhook URL



In the example below, we want our webhook to notify our Slack channel when one of our assigned users has submitted a feedback form for the assigned course.

Note: You get the action URL from the application. In this example, I am using my Slack integration URL.

Action

URL

Generating Slack Webhook URL

The Webhook URL mentioned in above is generated differently on different apps. On Slack, it may be created in the following way (<https://api.slack.com/messaging/webhooks#getting-started>):

- Set up Incoming Webhooks
- Create a new Slack app in the workspace where you want to post messages.
- From the Features page, toggle Activate Incoming Webhooks on.
- Click Add New Webhook to Workspace.
- Pick a channel that the app will post to, then click Authorize.
- Use your Incoming Webhook URL to post a message to Slack.

Deleting Webhooks

If you no longer need a webhook, simply click the [Delete] button to remove it. Once deleted, the eLeaP system will not send anymore actions to your application.

Audit Trail

The Audit Trail tool is a log which keeps a record of important actions occurring in your account. You can use the Audit to investigate certain changes and actions performed by you and your team.

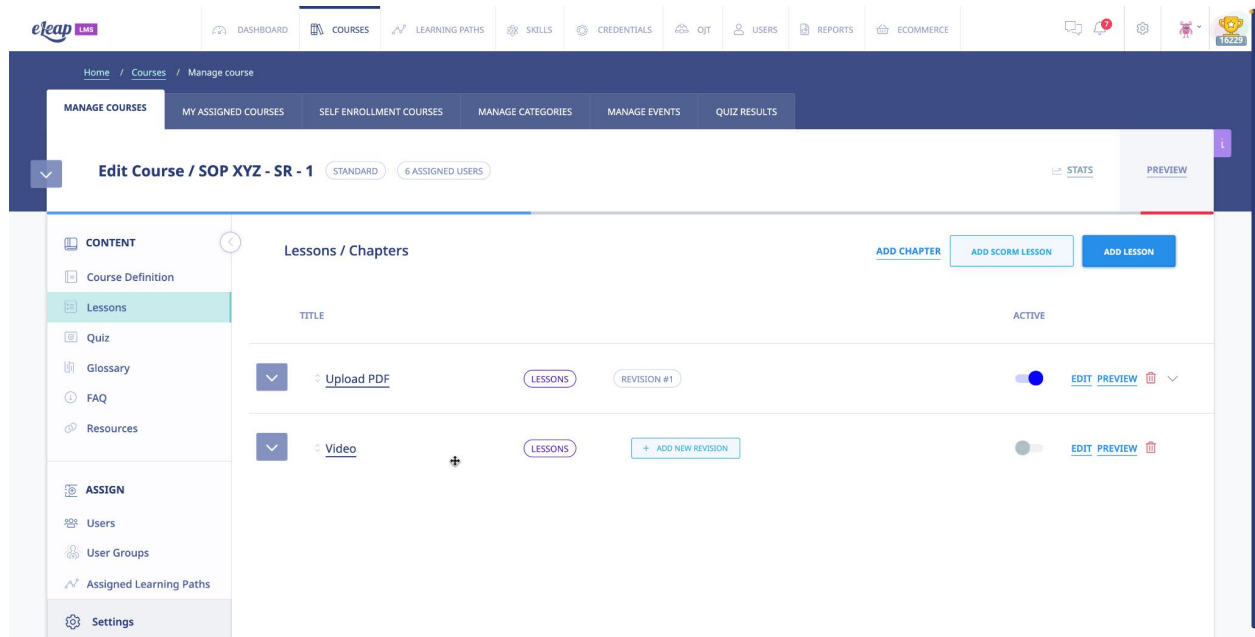
You can filter your Audit Trail logs by Module, ID of Item, Action (performed) or IP (address).

Note that the ID's shown for specific items can be added to long form URL's to identify the specific records. For example:


AUDIT TRAIL									
Audit Trail									
<div><input type="text" value="Module"/> <input type="text" value="Item ID"/> <input type="text" value="Action"/> <input type="text" value="IP"/> <input type="button" value="FILTER"/> <input type="button" value="CLEAR"/></div>									
NO.	DATE	USER	MODULE	ITEM ID	ACTION	IP	RAW DATA		
1.	04/06/2023 12:07:45 EDT	Cook, Steve	Courses	147676	Save General Settings - SOP XYZ - SR - 1	96.28.40.136			
2.	04/06/2023 12:06:10 EDT	Cook, Steve	Lessons	630367	Test / Test was deleted	96.28.40.136			
3.	04/06/2023 12:06:10 EDT	Kashyap, Ranjan	Courses	150676	Test was deleted	96.28.40.136			
4.	04/06/2023 12:05:50 EDT	Cook, Steve	Lessons	641335	margarit test / ee was deleted	96.28.40.136			

The above screenshot indicates ITEMID's for the various items in the audit trail. Click on the Item ID to

get more details. Note that eLeaP opens a new tab when an item is clicked. For example, clicking on the course id will open this page.



Courses

Selecting  **COURSES** tab on the main menu bar displays the **Manage Courses** screen, illustrated below. The **MANAGE COURSES** tab displays the Courses that you have created with the **Name**, **Category**, **Instructor** and **Date Created** details shown for each Course on the **Courses** list. You can change a Course's **Status** to **Inactive** by clicking the icon within that Course's **Active** column.

The screenshot shows the 'Manage Courses' interface in the eLeaP LMS. At the top, there's a navigation bar with tabs like DASHBOARD, COURSES, LEARNING PATHS, SKILLS, CREDENTIALS, QLT, USERS, REPORTS, and ECOMMERCE. Below this, a sub-navigation bar includes 'MANAGE COURSES' and other options like 'MY ASSIGNED COURSES'. The main content area is titled 'Manage Courses' and shows a list of 472 total courses (61 to 80 shown). A search bar and filter buttons are present. The course list table has columns: COURSE NAME/INSTRUCTOR, SKILLS, CREDITS, CATEGORY, # OF USERS, PROGRESS, DATE CREATED, and ACTIVE. The courses listed are:

COURSE NAME/INSTRUCTOR	SKILLS	CREDITS	CATEGORY	# OF USERS	PROGRESS	DATE CREATED	ACTIVE
<u>T3 Orientation Course 101</u> Cook, Steve	DELEGATION		PROCESS IMPROVEMENT	3 USERS	<div><div></div></div>	02/22/2022	<input checked="" type="checkbox"/> EDIT
<u>New Hire Training 101 : DUPLICATE</u> Cook, Steve			ORIENTATION	1 USERS	<div><div></div></div>	02/22/2022	<input checked="" type="checkbox"/> EDIT
<u>New Hire Training 101</u> Cook, Steve	CULTURAL COMPETENCE		ORIENTATION	7 USERS	<div><div></div></div>	02/22/2022	<input checked="" type="checkbox"/> EDIT
<u>SOP 553367 : esign : DUPLICATE</u> Cook, Steve	INACTIVE		PHARMACY	1 USERS	<div><div></div></div>	02/21/2022	<input type="checkbox"/> EDIT
<u>SOP 553367 : esign</u> Cook, Steve		3 CPE	PHARMACY	1 USERS	<div><div></div></div>	02/21/2022	<input checked="" type="checkbox"/> EDIT
<u>Getting started with PR : DUPLICATE</u> Cook, Steve			UNCATEGORIZED	1 USERS	<div><div></div></div>	02/17/2022	<input checked="" type="checkbox"/> EDIT

You can filter the Courses displayed on the **Courses** list by selecting either a Course Name from the **Course Name** list or a **Course Category** from the **Course Category** list, or both, and then by clicking the [APPLY FILTERS](#) button.

You can also do additional filtering using the [Course Type] or [Show Only] drop-down

The screenshot displays the 'Manage Courses' page in the eLeaP Administrator interface. At the top, there's a navigation bar with tabs: 'MANAGE COURSES', 'MY ASSIGNED COURSES', 'SELF ENROLLMENT COURSES', 'MANAGE CATEGORIES', 'MANAGE EVENTS', and 'QUIZ RESULTS'. Below this, the 'Manage Courses' section shows '162 TOTAL COURSES (1 TO 20 SHOWN)'. A search bar and filter options are present. A dropdown menu for 'Show Only' is open, showing options: 'All' (selected), 'Purchased Courses', 'Active Courses', and 'Inactive Courses'. The table below lists several courses with their details.

COURSE NAME/INSTRUCTOR	CREDITS	Category	OF USERS	PROGRESS	DATE CREATED	ACTIVE	
Still We Rise Sam, Pete		EVENTS	1 USERS		12/03/2021	<input checked="" type="checkbox"/>	PREVIEW EDIT
Orientation 101 Sam, Pete		ORIENTATION	21 USERS		11/30/2021	<input checked="" type="checkbox"/>	PREVIEW EDIT
Sales Training For New Hires Sam, Pete		PRODUCTIVITY	0 USERS		11/29/2021	<input type="checkbox"/>	PREVIEW EDIT
Getting My CE's Done Sam, Pete	2 CEU	SOFT SKILLS	1 USERS		11/29/2021	<input checked="" type="checkbox"/>	PREVIEW EDIT
Sample Course Sam, Pete		UNCATEGORIZED	3 USERS		11/24/2021	<input checked="" type="checkbox"/>	PREVIEW EDIT

Options are:

All: Show all courses in your account

Purchased Courses: Show only courses you have purchased from the eLeaP Network

Active Courses: Show only active courses

Inactive Courses: Show only inactive courses

Note that you can also the [HIDE/SHOW INACTIVE] option at the bottom of the page.

Progress Bar – Legend

The screenshot shows the 'Manage Courses' interface with a table of courses. Red arrows point from text annotations to specific elements in the table:

- 'Course in [Skill!]' points to the 'DELEGATION' skill tag for 'T3 Orientation Course 101'.
- 'Red: Deadline missed' points to a red progress bar for 'T3 Orientation Course 101'.
- 'Green: Completed' points to a green progress bar for 'New Hire Training 101 : DUPLICATE'.
- 'Blue: In Progress' points to a blue progress bar for 'New Hire Training 101'.
- 'Course earns CE credits' points to the '3 CE' tag for 'SOP 553367 : esign : DUPLICATE'.

COURSE NAME/INSTRUCTOR	SKILLS	CREDITS	CATEGORY	# OF USERS	PROGRESS	DATE CREATED	ACTIVE
<u>T3 Orientation Course 101</u> Cook, Steve	DELEGATION	PROCESS IMPROVEMENT		3 USERS	Red: Deadline missed	02/22/2022	EDIT
<u>New Hire Training 101 : DUPLICATE</u> Cook, Steve		ORIENTATION		1 USERS	Green: Completed	02/22/2022	EDIT
<u>New Hire Training 101</u> Cook, Steve	CULTURAL COMPETENCE	ORIENTATION		8 USERS	Blue: In Progress	02/22/2022	EDIT
<u>SOP 553367 : esign : DUPLICATE</u> Cook, Steve	INACTIVE	PHARMACY		1 USERS		02/21/2022	EDIT
<u>SOP 553367 : esign</u> Cook, Steve		3 CE PHARMACY		1 USERS		02/21/2022	EDIT

- **Red** = Users have missed deadline
- **Blue** = Users in progress
- **Green** = Users have completed course
- **Gray** = Users have not started course

Adding a New Course

Selecting the **ADD NEW COURSE** button on the **Manage Courses** screen displays the **Add Course** screen, as shown in the following illustration. Use the steps below to successfully add a new Course to the system.

Add New Course Standard Course

CONTENT

- Course Definition
- Lessons
- Quiz
- Glossary
- FAQ
- Resources

ASSIGN

- Users
- User Groups
- Assigned Learning Paths

ENGAGE

- Settings

Course Name *

The course name

Course Category

Select a category

Course Cover Image

CHOOSE FILE

Instructors

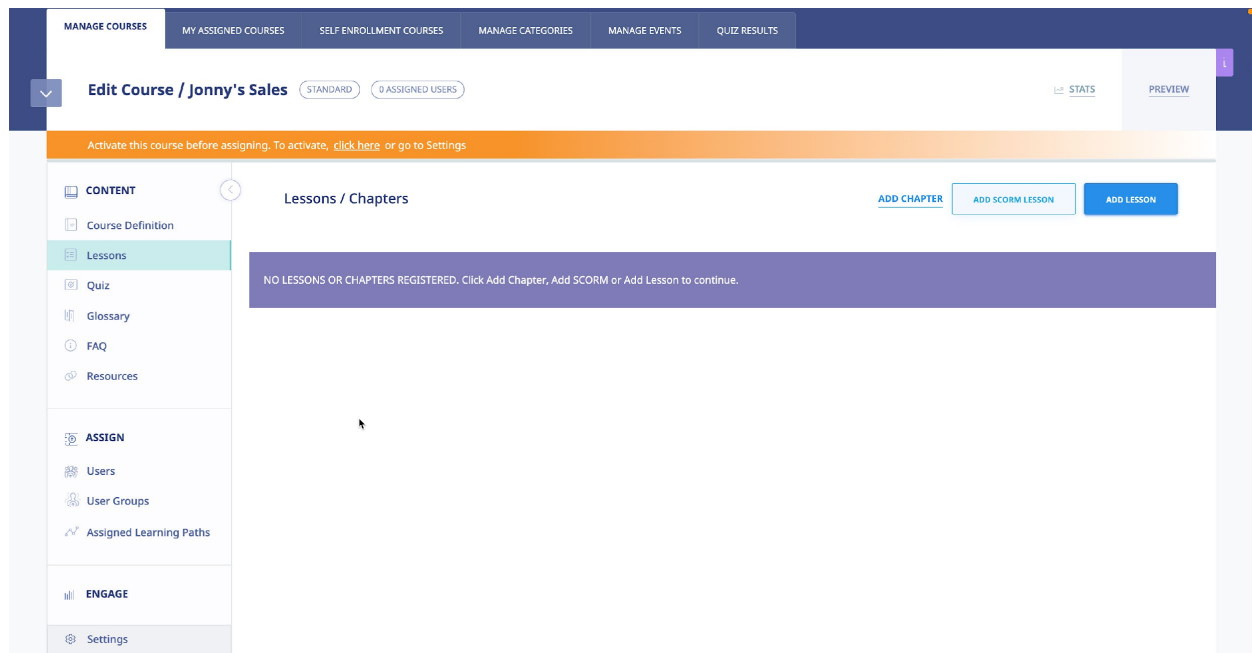
Sam, Pete x

Description

Rich text editor toolbar: Bold, Italic, Underline, Text color, Background color, Link, Unlink, Font size, etc.

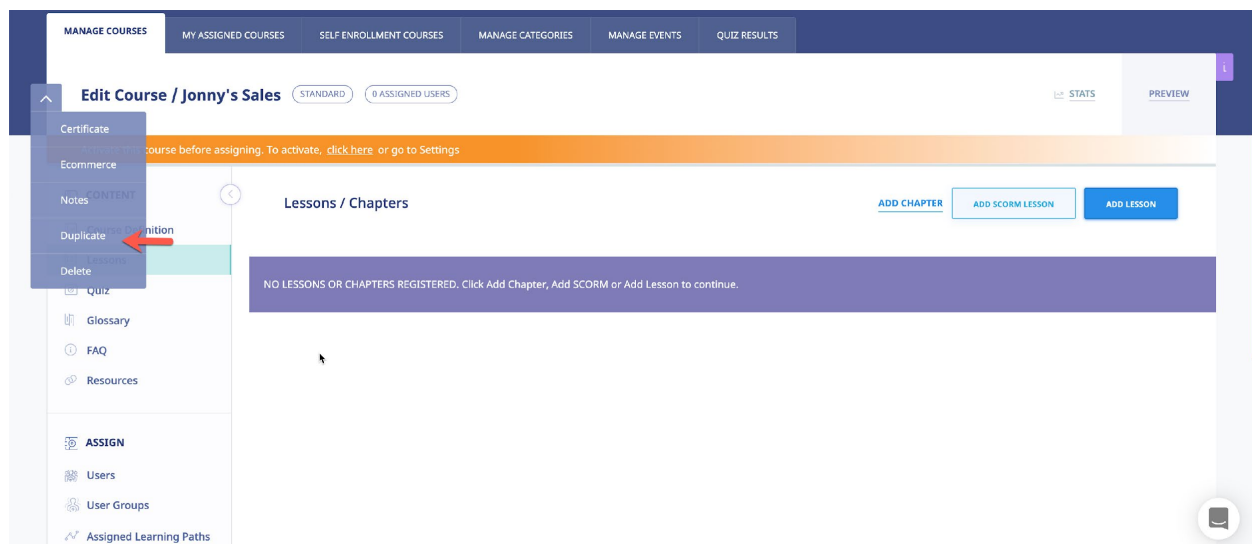
1. Select [Standard Course](#) for a regular course or [Observation Checklist](#) for an Observation Assessment course.
2. Enter a Name for the new Course in the **Name** field.
3. Select a Category with which to associate the new Course from the **Category** list.
4. You can select a **course cover image** by using the [Choose File] option
5. Add additional **Instructors** to help manage your course
6. Enter a Description (optional) for the new Course within the **Description** editor.
7. Enter the Objectives for the new Course within the **Objectives** editor.

Once you click **SAVE**, the new course definitions will be saved, and you can proceed to adding lessons to your newly created course. The course will also be listed in the **Courses** list on the **Manage Courses** screen.




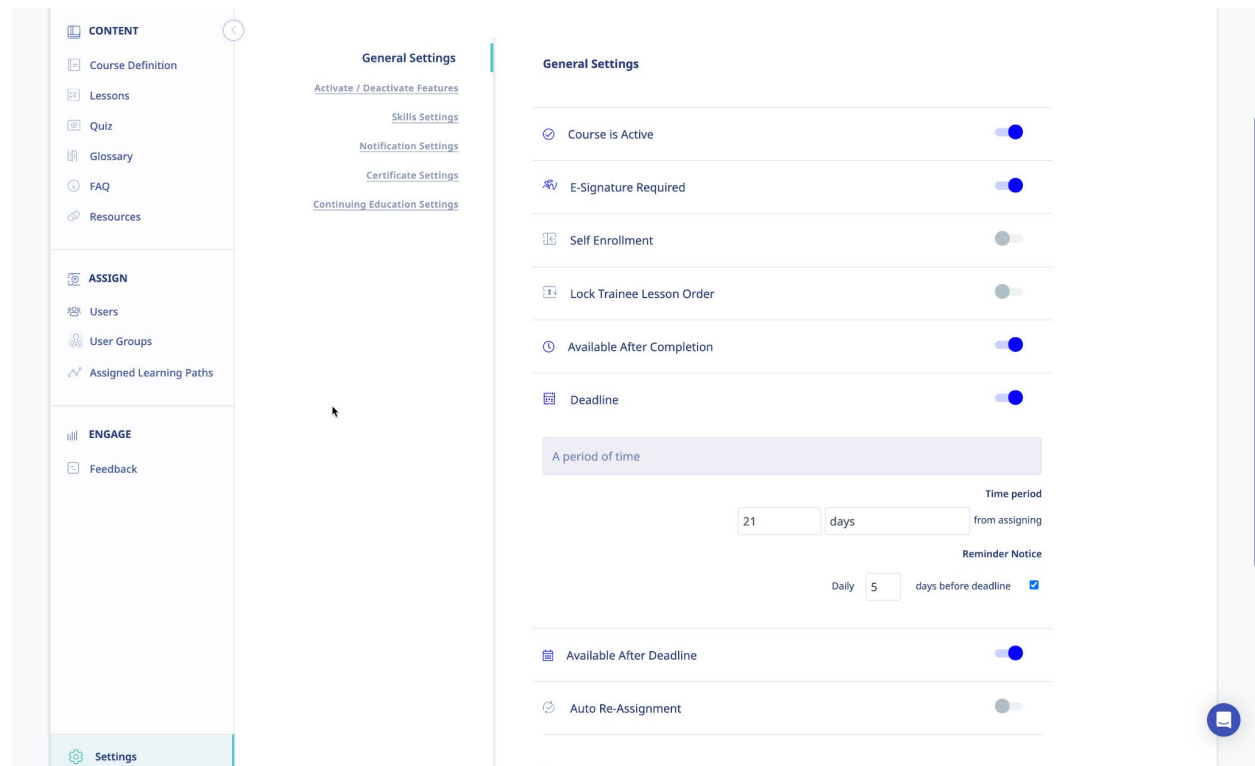
The **Course Details** screen for the newly created Course is displayed, as shown above. Click the **Course Definition** submenu item to make any modifications necessary to the Course.

You can also click the [Duplicate] option in the course submenu drop down to make a copy of the Course, which is especially useful if a majority of the Course's details will be similar to any additional Courses that you want to create. The course submenu dropdown also provides additional menu items.



Course Settings:

The course settings are in a dedicated section. Click  **Settings** to access course settings:



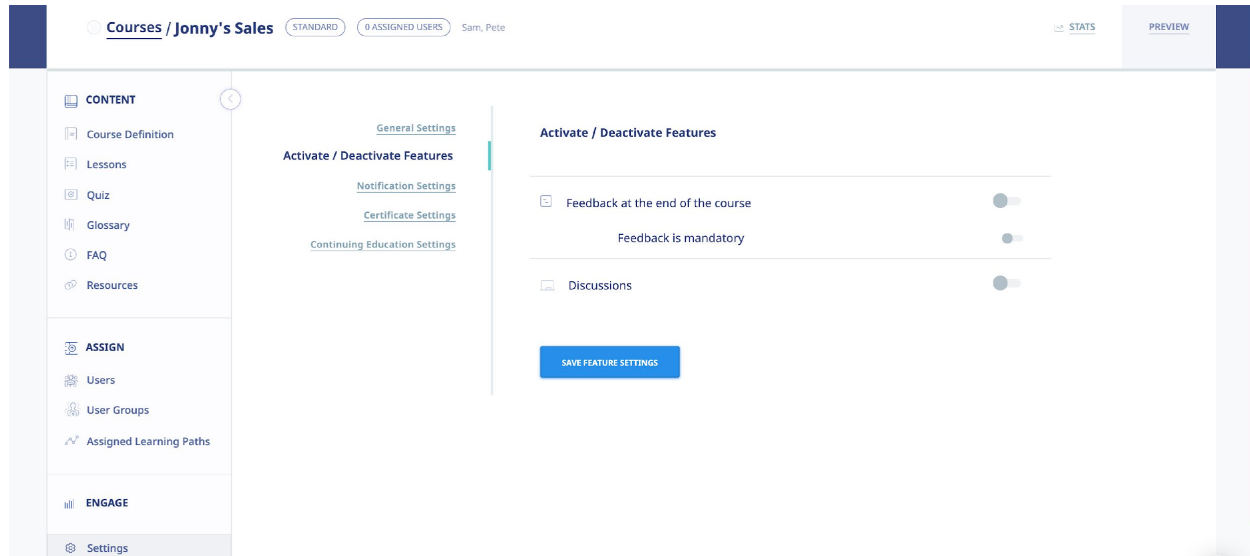
General Settings:

In the **General Settings** section of **Course Settings** section, you can

- **Activate** or **deactivate** the course by toggling the course status switch On/Off.
- Toggle the **E-Signature Required** to **ON** if you want to enforce a digital signature for Course completion; otherwise, leave it as **OFF**.
- Toggle the **Self Enrollment** to **ON** if you want to give users the chance to enroll in courses you create.
 - a. Self-Enrollment restriction:
 - i. **All Users:** Any user in your account can self-enroll in this course.
 - ii. **Specific User Groups:** Only users in selected user groups can self-enroll in this course.
- **Lock** the **order** of your lessons so your trainees are required to view the course in the order it was created.
- Toggle the **Available After Completion** option to OFF if you don't want to allow Users

who have completed the new Course continued access to it; otherwise, leave it as **ON**.

- Toggle **Deadline** to **ON** if you want to impose a deadline for completion of the new Course; otherwise, leave it as **OFF**.
 - a. **Available After Deadline:** If you toggle this to **ON**, your assigned users will not be able to complete quizzes, feedback forms or completions after the deadline passes.
- Toggle the **Auto Re-Assignment** to **ON** if you need to re-assign your course sometime in the future – like annual training. Use the calendar to select the re-assignment date.



Activate/Deactivate Settings:

In the **Activate/Deactivate Settings** section of **Course Settings** section, you can

- Toggle the **Active Feedback** to **ON** option if you want to enable the Active Feedback function; otherwise, leave as **OFF** option.
- Toggle the **Require Feedback** to **ON** if you want to enforce a feedback form submission as a condition for course completion.
- Toggle the **Active Discuss** to **ON** if you want to add a Forum-specific Discussion board for the Course; otherwise leave as **OFF** option.

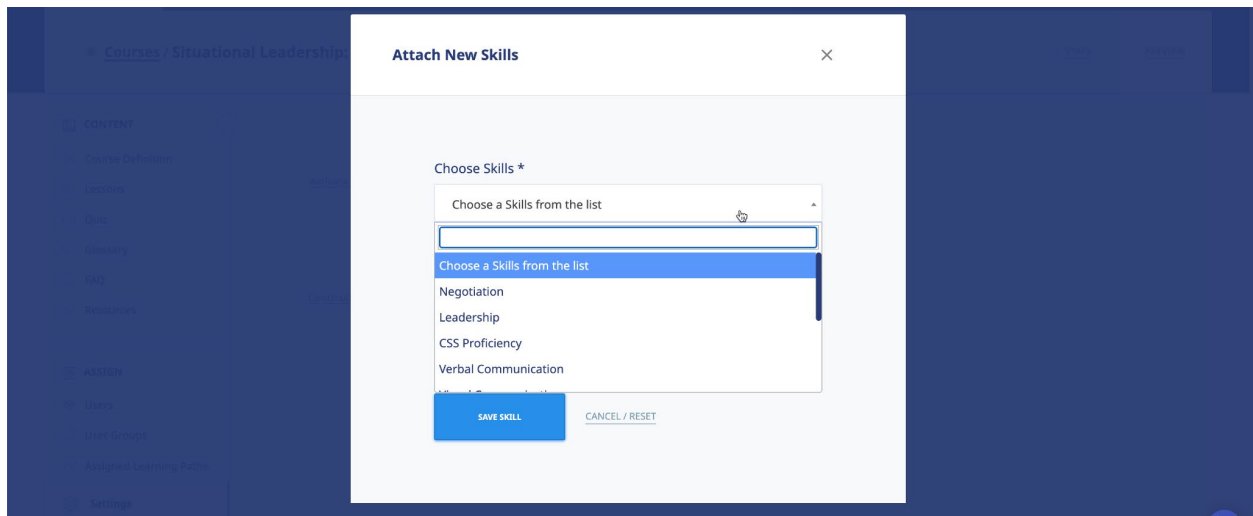
The screenshot shows the eLeaP Administrator interface. At the top, there's a breadcrumb trail: **Courses / Jonny's Sales**. To the right of the breadcrumb are tabs: **STANDARD**, **0 ASSIGNED USERS**, and **Sam, Pete**. Further right are **STATS** and **PREVIEW** buttons. On the left is a sidebar with a navigation menu. The main content area is titled **Notification Settings**. It contains three sections: **Assignment Notification** (with a toggle switch), **Non Completion Notification** (with a toggle switch), and **Notification Contact** (with a dropdown menu labeled **Select instructor**). At the bottom of the main content area is a blue button labeled **SAVE NOTIFICATION SETTINGS**.

Skills Settings

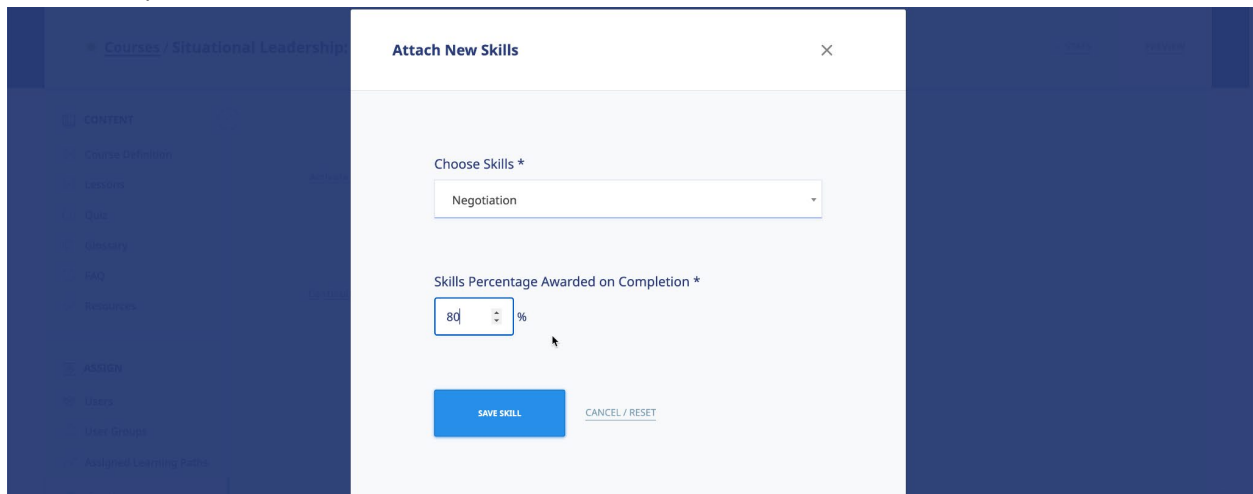
From the [General Settings] section, click the [Skills Settings] link to see the current Skills Settings setup.

The screenshot shows the eLeaP Administrator interface. At the top, there's a breadcrumb trail: **Home / Courses**. Below it is a navigation bar with tabs: **MANAGE COURSES**, **MY ASSIGNED COURSES**, **SELF ENROLLMENT COURSES**, **MANAGE CATEGORIES**, **MANAGE EVENTS**, and **QUIZ RESULTS**. Below the navigation bar is a breadcrumb trail: **Courses / Situational Leadership: Skills...**. To the right of the breadcrumb are tabs: **STANDARD COURSE**, **LEADERSHIP**, **2 USERS**, and **Cook, Steve**. Further right are **STATS** and **PREVIEW** buttons. On the left is a sidebar with a navigation menu. The main content area is titled **Skills Settings**. It contains a blue button labeled **ATTACH NEW SKILLS**.

Then click the [Attach New Skills] button to attach this course to specific skills.



Select the right Skill from the dropdown list. If you don't see your required, it means it has not been created. Go back to the Skills Overview to add the skill before returning to the Skills Settings section. If your required Skill is present, select it and then enter the Skills Percentage Score to be awarded on course completion.



You can attach more than one skill to a specific course. If you need to attach more skills, click the [Attach New Skills].

Notifications Settings:

In the **Notifications Settings** section of **Course Settings** section, you can

- Turn the **Assignment Notifications** option to **OFF** if don't want the system sending email notifications to Users assigned to the new Course; otherwise, leave it **ON**.

- Toggle the **Non Completion Notification** to **ON** if you want to send a course summary report showing individual who have not completed the course by the due date.

The screenshot shows the eLeaP Administrator interface for 'Jonny's Sales' course. The left sidebar contains sections: CONTENT (Course Definition, Lessons, Quiz, Glossary, FAQ, Resources), ASSIGN (Users, User Groups, Assigned Learning Paths), and ENGAGE (Settings). The main content area is titled 'Certificate Settings' and includes links for General Settings, Activate / Deactivate Features, Notification Settings, and Continuing Education Settings. The 'Certificate Settings' section has two fields: 'Release certificate' set to 'Manually' and 'Certificate Template' with an 'EDIT TEMPLATE' link. A 'SAVE CERTIFICATE SETTINGS' button is at the bottom.

Certificate Settings:

In the **Certificate Settings** section of **Course Settings** section, you can

- Set your certificate release option.
- Edit your certificate template to personalize it.

The screenshot shows the eLeaP Administrator interface for 'Jonny's Sales' course, specifically the 'Continuing Education Settings' section. The left sidebar is identical to the previous screenshot. The main content area has links for General Settings, Activate / Deactivate Features, Notification Settings, and Continuing Education Settings. The 'Continuing Education Settings' section includes: 'Continuing Education' toggle (set to 'On'), 'Credit Type' dropdown (set to 'CEU - Continuing Education Unit'), 'Number of CE units awarded for this course' input (set to '1'), and 'Send renewal reminders to CE users' toggle (set to 'Off'). A 'SAVE CE SETTINGS' button is at the bottom.

Continuing Education Settings:

In the **Continuing Education Settings** section of **Course Settings** section, you can

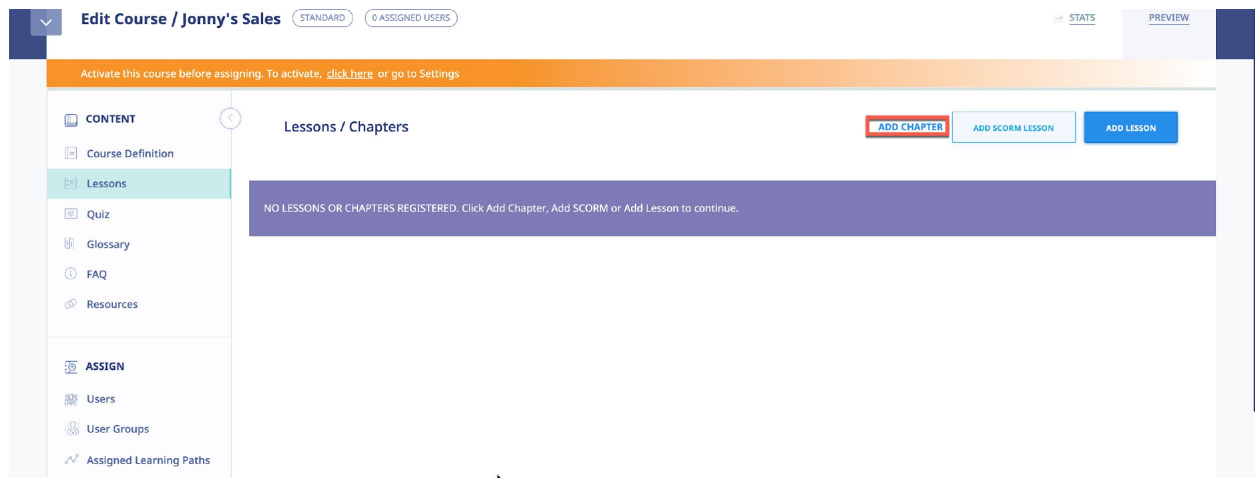
- Toggle the Continuing Education option for the course you're managing.
- Select the Credit Type for the course. You can edit/manage credit types from your company account settings page.
- Set the number of credits units the course will award.
- Set renewal reminders for users who have taken the course.

Adding Chapters and Lessons to a Course

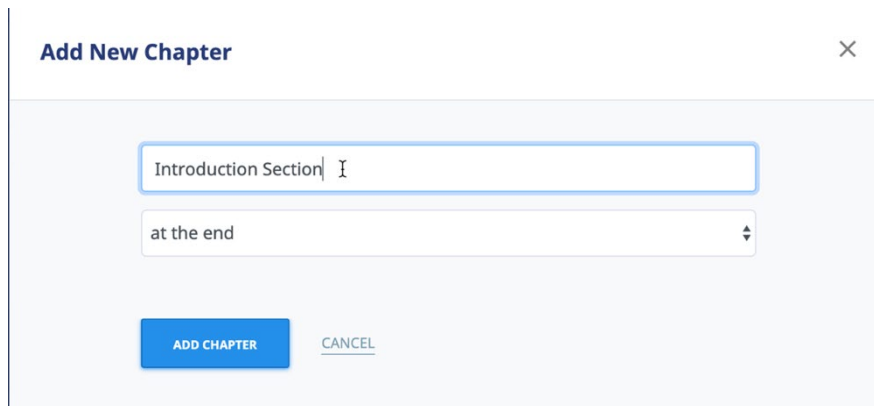
Any courses that you create need to consist of Chapters and/or Lessons. Chapters serve as a table of contents or outline, for the Course, while Lessons contain the Course's content. Adding Chapters and Lessons is accomplished using the **Course Details** screen, described above.

Adding a Chapter to a Course

To create a Chapter, click the **ADD CHAPTER** link, enter a Title for the Chapter in the **Title** field, select whether to place the Chapter **at the beginning** or **at the end** of the Course and then click **ADD CHAPTER**, as shown in the following illustration.

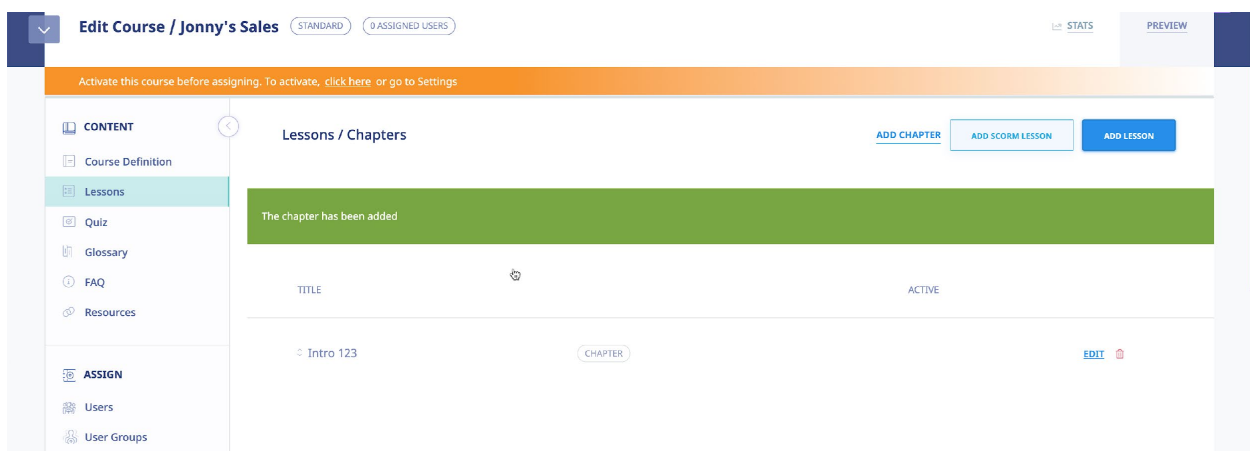


Add Chapter Screen:



The 'Add New Chapter' dialog box features a title input field containing 'Introduction Section', a dropdown menu set to 'at the end', and two buttons at the bottom: 'ADD CHAPTER' and 'CANCEL'.

As shown in the following illustration, the Chapter has been added to the Course.



The interface shows the 'Edit Course / Jonny's Sales' page with a sidebar menu. The 'Lessons / Chapters' section is active, displaying a green confirmation banner 'The chapter has been added'. Below this is a table with columns 'TITLE' and 'ACTIVE'. The table contains one entry: 'Intro 123' with a 'CHAPTER' tag and an 'EDIT' link.

TITLE	ACTIVE
Intro 123	CHAPTER EDIT

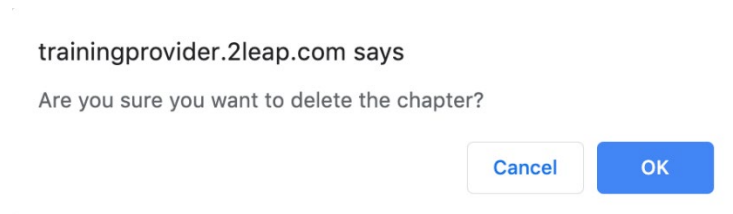
Editing a Chapter

You can edit the Title of any Chapter that you created by clicking its **edit title** link as shown in the

following illustration. Simply make any modifications necessary to the Chapter Title and click [SAVE](#).

Deleting a Chapter

You can delete a Chapter from a Course by selecting its **delete** link. As shown in the illustration below, the system displays a warning message before performing the deletion to ensure that this is your intention, before proceeding. Simply click **OK** to proceed with the deletion or click **Cancel** to cancel the deletion process.



Adding a Lesson to a Course

Any courses that you create need to consist of Chapters and/or Lessons. Creating a Lesson is also accomplished using the **Course Details** screen, described above. To create a Lesson, click the **ADD LESSON** button, enter a Title for the Lesson in the **Title** field, select whether to place the Lesson **at the beginning** or **at the end** of the Course and then click **ADD LESSON**, as shown in the following illustration.

A dialog box titled "Add New Lesson" with a close button (X) in the top right corner. It contains a text input field with the text "How we are different" and a cursor. Below the text field is a dropdown menu currently showing "at the end". At the bottom of the dialog, there are two buttons: a blue "ADD LESSON" button and a white "CANCEL" button with a blue outline.

As shown in the following illustration, the Lesson has been added to the Course.

The screenshot shows the 'Edit Course / Jonny's Sales' interface. At the top, there's a header with 'Edit Course / Jonny's Sales', 'STANDARD', '0 ASSIGNED USERS', and buttons for 'STATS' and 'PREVIEW'. Below the header is an orange banner with the text: 'Activate this course before assigning. To activate, [click here](#) or go to Settings'. The main content area is divided into a left sidebar and a main panel. The sidebar has two sections: 'CONTENT' with links to 'Course Definition', 'Lessons', 'Quiz', 'Glossary', 'FAQ', and 'Resources'; and 'ASSIGN' with links to 'Users', 'User Groups', and 'Assigned Learning Paths'. The 'Lessons' link is highlighted. The main panel is titled 'Lessons / Chapters' and has buttons for 'ADD CHAPTER', 'ADD SCORM LESSON', and 'ADD LESSON'. A green message box says 'The lesson has been added'. Below this is a table with columns 'TITLE' and 'ACTIVE'. The table has two rows: one for 'Intro 123' with a 'CHAPTER' tag and an 'EDIT' button, and another for 'Lesson name' with a 'LESSONS' tag, a toggle switch, and 'EDIT' and 'PREVIEW' buttons. The 'Orientation' row also has a 'LESSONS' tag, a toggle switch, and 'EDIT' and 'PREVIEW' buttons.

Adding Content to a Lesson

Selecting a **Lesson Title** within the **Chapters & Lessons** portion of the **Manage Course** screen displays the **View Lesson** page, illustrated below. You can click the [**Click here to add content**] or [**EDIT LESSON**] button to add pre-existing content to the Lesson. You will be using the system's **Content Editor** to manage this.

The screenshot shows the 'Lesson name' view. At the top, there's a header with 'Lesson name' and an 'EDIT LESSON' button. The main content area is divided into a left sidebar and a main panel. The sidebar has two sections: 'CONTENT' with links to 'Course Definition', 'Lessons', 'Quiz', 'Glossary', 'FAQ', and 'Resources'; and 'ASSIGN' with links to 'Users', 'User Groups', and 'Assigned Learning Paths'. The 'Lessons' link is highlighted. The main panel is titled 'Lesson name' and has a 'Content' section with a message 'No content present. [Click here to add content.](#)' and a 'Quick Quiz' section with an 'ADD QUIZ QUESTION' button. On the right side, there's a 'Files Attachments' section and a 'Settings' section with 'Active' (NO) and 'Open Date' (12/05/2021). At the bottom right, there's a '< BACK TO COURSE' button.

Lesson name

CONTENT

Course Definition

Lessons

Quiz

Glossary

FAQ

Resources

ASSIGN

Users

User Groups

Assigned Learning Paths

Content

No content present. [Click here to add content.](#)

Quick Quiz

ADD QUIZ QUESTION

Files Attachments

Settings

Active

NO

Open Date

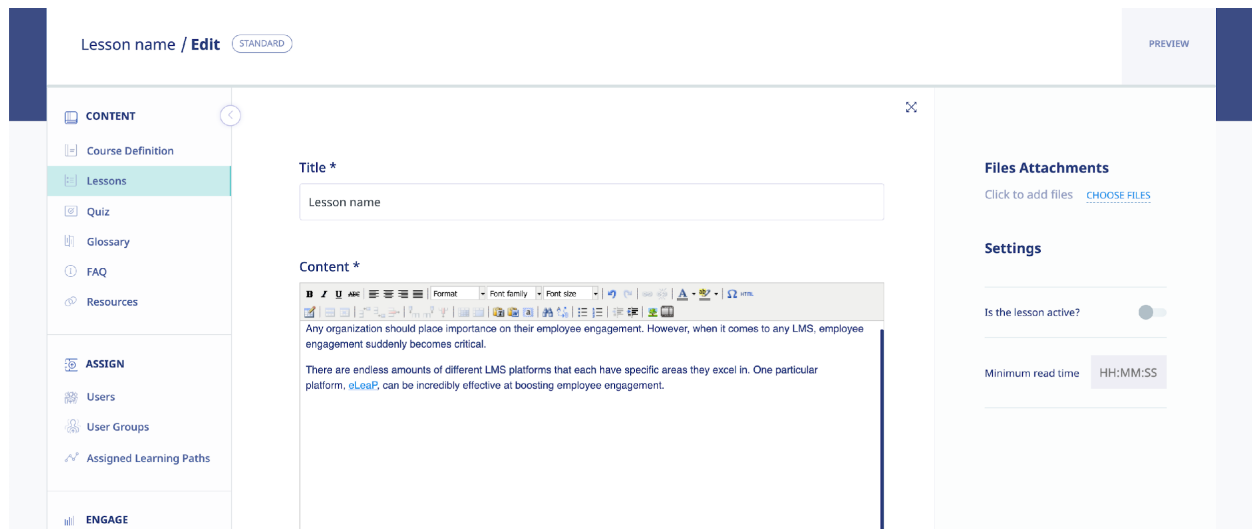
12/05/2021


[BACK TO COURSE](#)

EDIT LESSON

eLeaP Content Editor

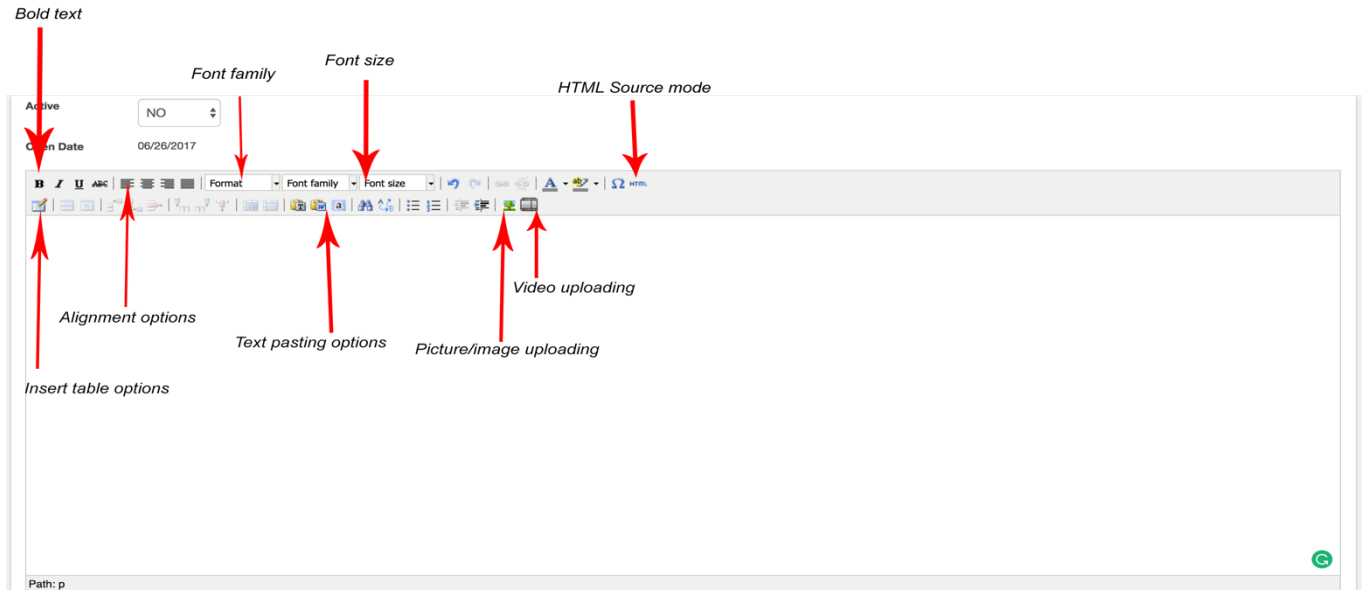
Click the **Click here to add content** link to add a synopsis or overview of the content contained within a Lesson. As shown in the following illustration, the **eLeaP Content Editor** is displayed, allowing you to create this content. You can also toggle the [Is the lesson active?] option to activate or deactivate the lesson within the system. You can also activate/deactivate lessons in the lessons.



You are now in the heart and brain of the eLeaP™ Course Content Management System. Some of you will recognize a familiar Microsoft Word or other CMS menu items layout. Insert your text or content anywhere in your Content Creation space. For example, to paste the content you have already created in Microsoft Word, click the  icon. Remember, you can format your layout to your exact specifications.

The illustration below shows the available functions on the Editor's Tool Bar:


eLeaP Administrator's Manual (V5+CEM)

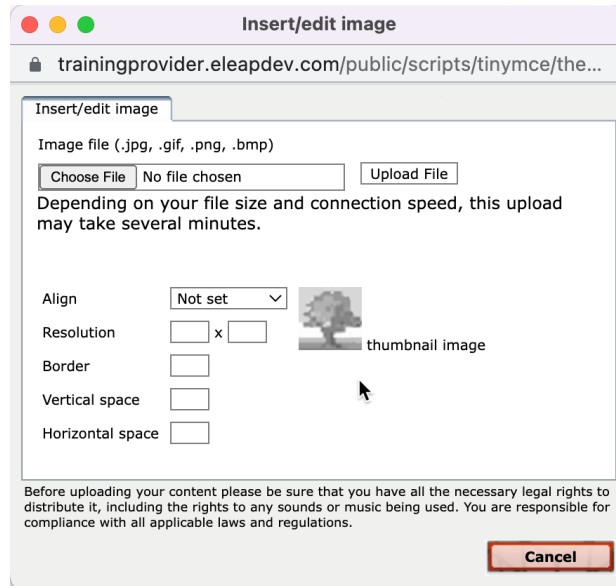


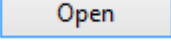
Complex Course e-Learning Objects:

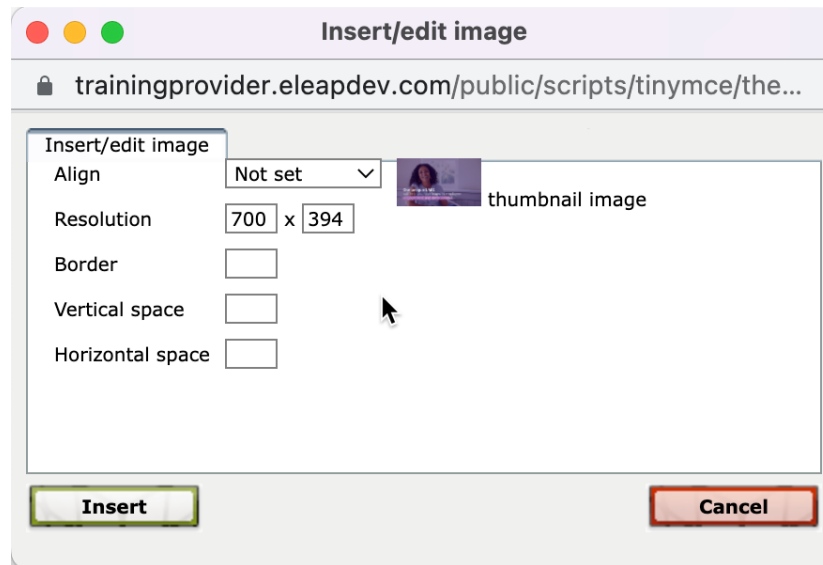
In today's e-learning and training environment, using multimedia-rich presentations can greatly enhance your trainees' learning experiences. eLeaP™ supports various multimedia formats including Video, Audio, Flash, HTML, PDF, Microsoft objects, SCORM 1.2, and SCORM 2004.

To add Graphics or Pictures

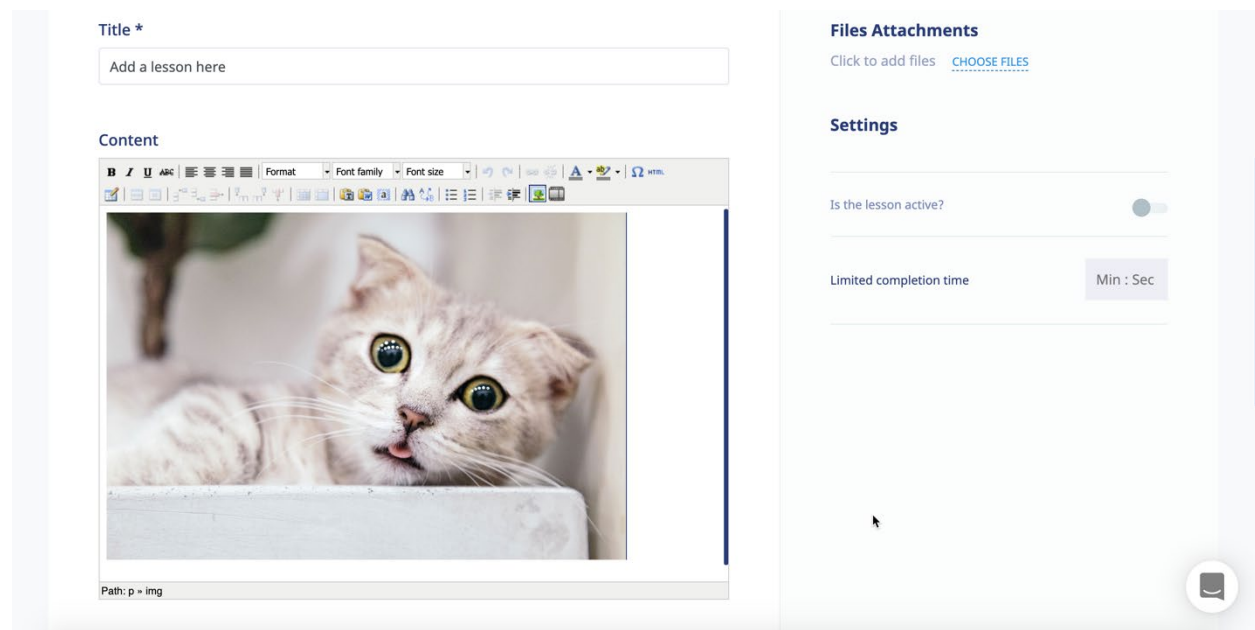
To add graphics or pictures to your learning content object, click . The **Insert/edit image** dialog, illustrated below, is displayed.




Browse your computer to locate the relevant picture or graphic, click  to upload the graphic. As shown in the following illustration, you will see a preview of your graphic in your upload window.

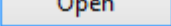


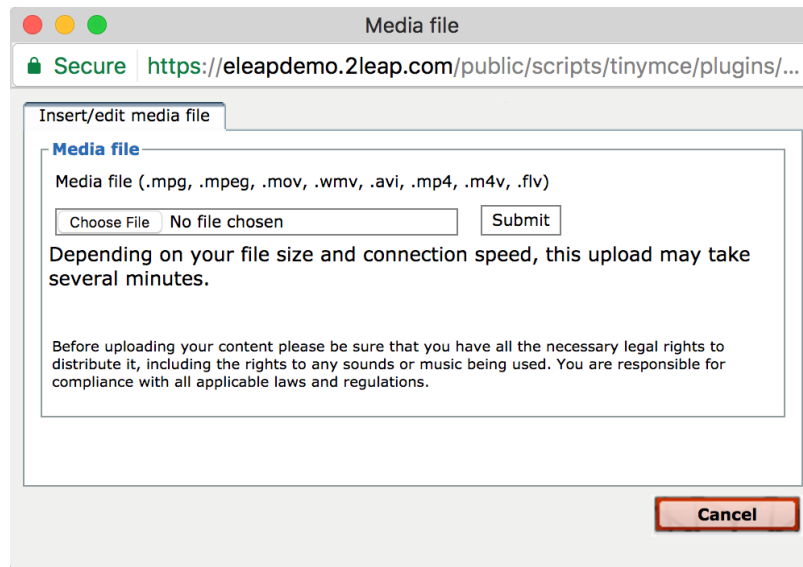
Next, set your alignment if needed, add a border if necessary or even define your resolution, and horizontal or vertical spaces, if needed. Then click **Upload File** to insert your graphic. As shown in the following illustration, the image is inserted within the editor.



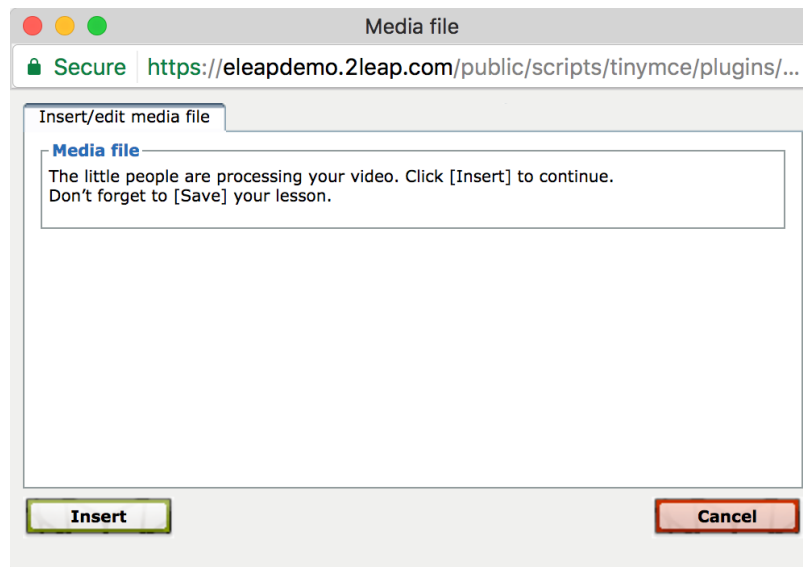
To add Video to your Course:

While in the **Content Creator** window, click the **[Video Media]** button () to add Video to your course. You would need to have pre-created your video in one of the following formats: .mpg, .mpeg, .mov, .wmv, .avi, .mp4, .m4v, .flv. The **Media file** dialog, illustrated below, is

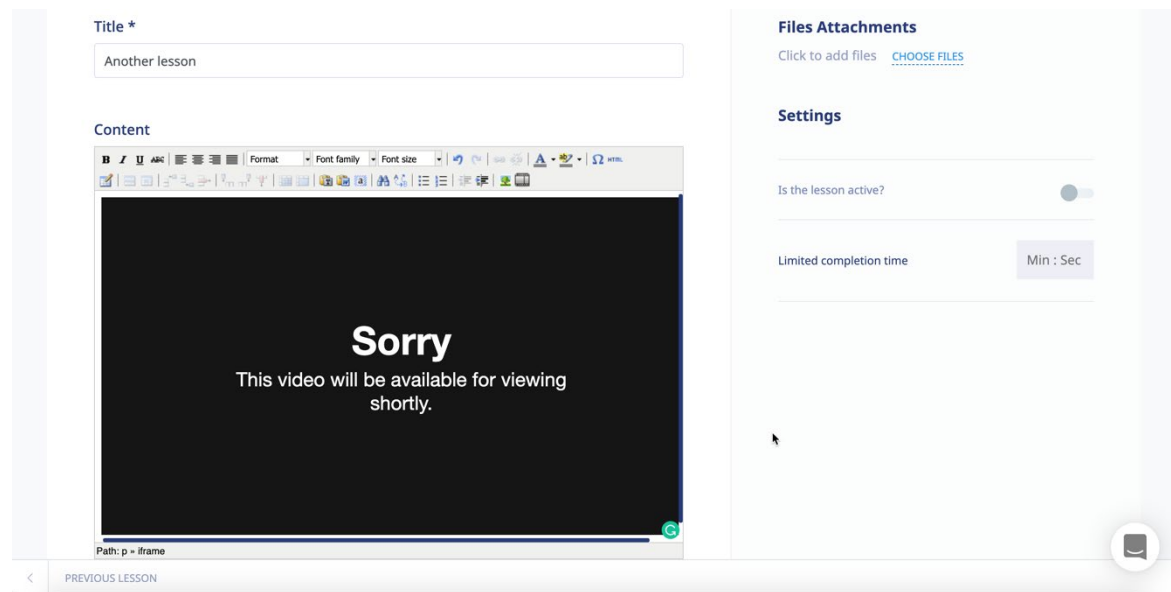
displayed. Browse your computer to locate the relevant picture or graphic, click  to populate the Media file field, and then click **Upload File**.



Once the Upload Process completes, you will see the option to [Insert] your new video into the lesson.



From time to time, when you click [Insert], you might get our 'video processing' notice.



No need to worry. The system simply needs a few seconds to process your video and have it ready for streaming live. Refresh your page to see your uploaded video.

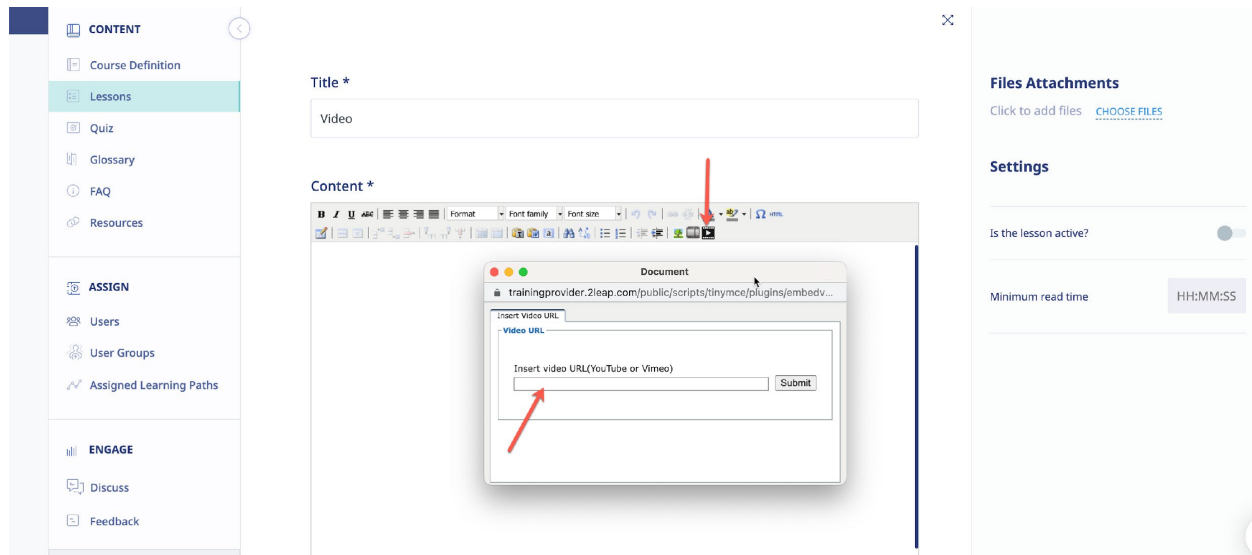
As shown in the following illustration, the video file is added to the Content Editor.



Note: You can easily import FLV videos into eLeaP using the video upload icon.

YouTube or Vimeo

Got YouTube or Vimeo videos you want to add to your course? Simple. Click the video embed icon illustrated below:

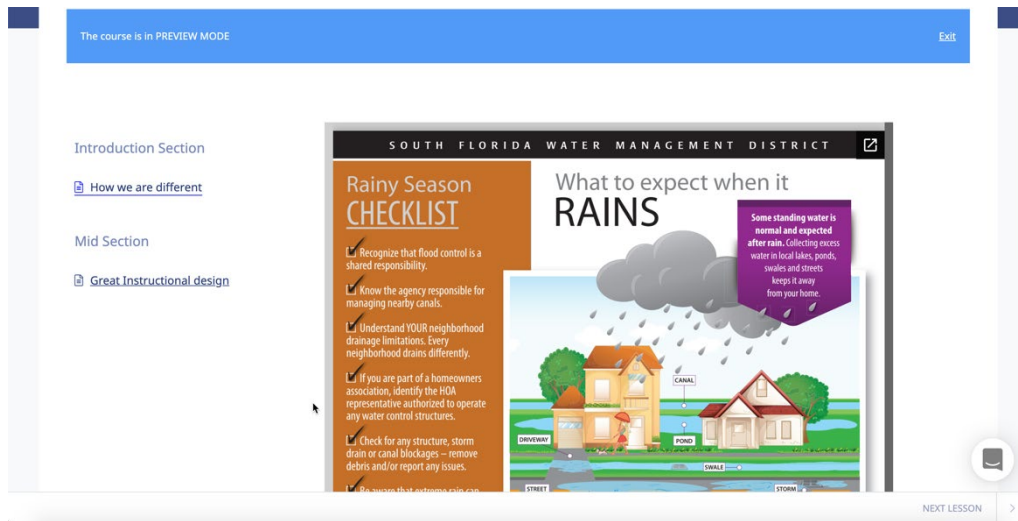


Then copy and paste the video URL from Vimeo or YouTube and click [submit] to add the video.

Note: Do you want to use PowerPoint files in your course? Check out tools for converting PowerPoint to SCORM and then importing your file into eLeaP. Some Converters we have checked out include Articulate 360, Storyline or Articulate Presenter, Camtasia, and Adobe Captivate. See the eLeaP Support website for more information. There are numerous benefits from converting your PowerPoint files to SCORM formats for web-based training. Check our eLeaP™ Knowledgebase in our Support Center to learn more or email help@eleapsoftware.com.

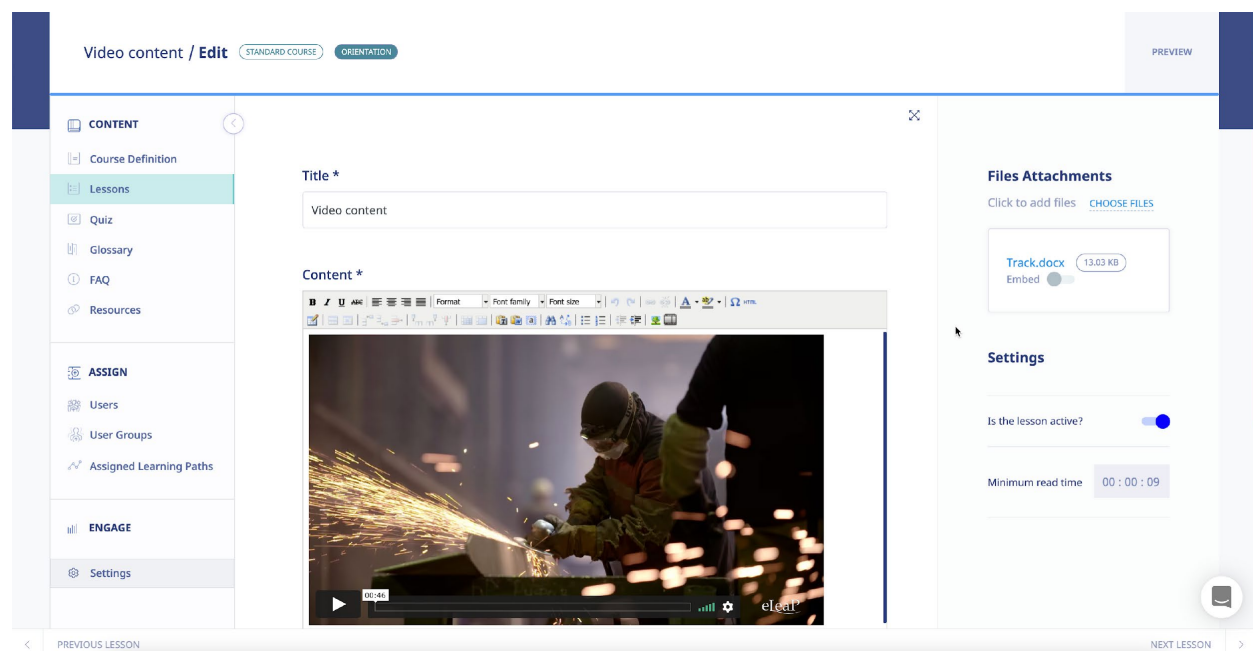
Once you have added all the media files that you will need, use of as many of the editor's other functions, as necessary, to add additional content, and then click **SAVE LESSON** to save this content to the Lesson.

As shown in a simple example in the illustration below, the content is added within the **Content** portion of the **View Lesson** screen. You can now also click the **edit lesson** link to modify this content at any time, or click the **print** link to print the screen.

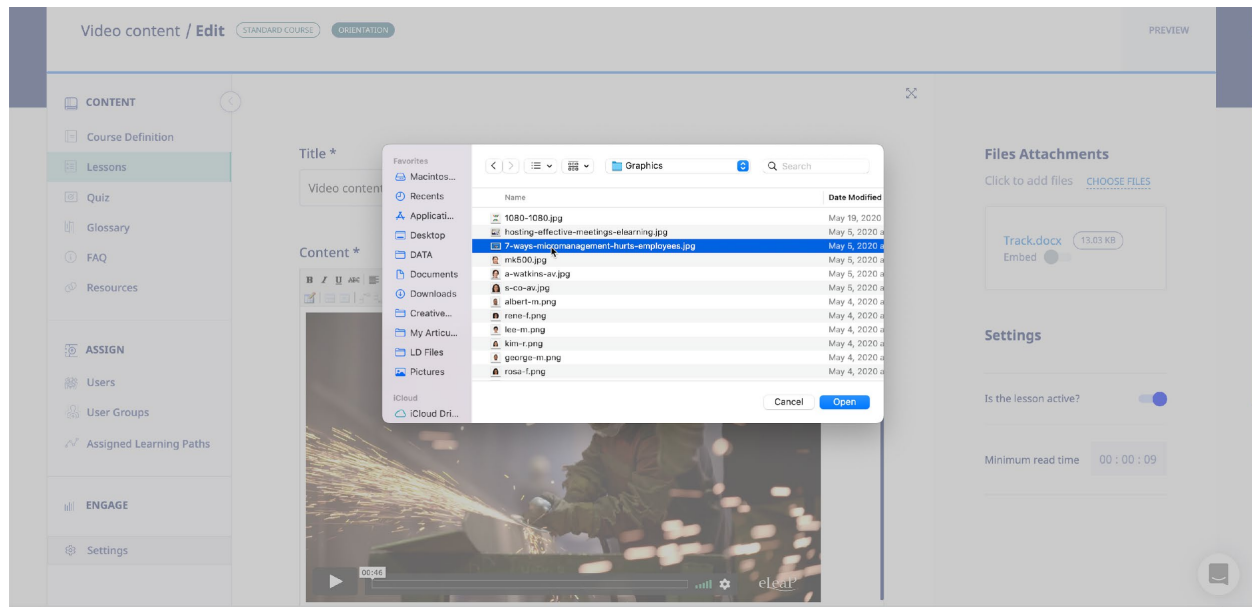


Uploading & Embedding Files

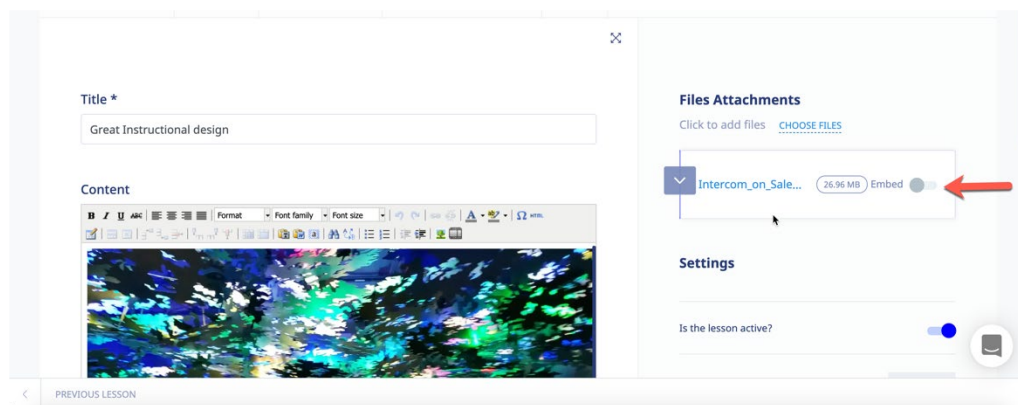
Clicking the **CHOOSE FILES** link expands the screen, as shown in the illustration below so that you can navigate to the location on your computer where the existing content that you want to add to a Lesson is stored.



A **Choose File** dialog, as shown in the illustration below, is displayed. Simply navigate to the location on your computer where the file is stored, select it, and then click **Open**.



As shown in the following illustration, the file you've selected now populates the **File to Upload** field. Click [Open] to upload the file to the system. You can toggle the embed option to have your file available to be viewed via the learner's web browser.



If you chose to embed your file, you will see a temporary processing message like this:

Simply give the system a few seconds to process your file. You can refresh your browser to see when the file has been processed.

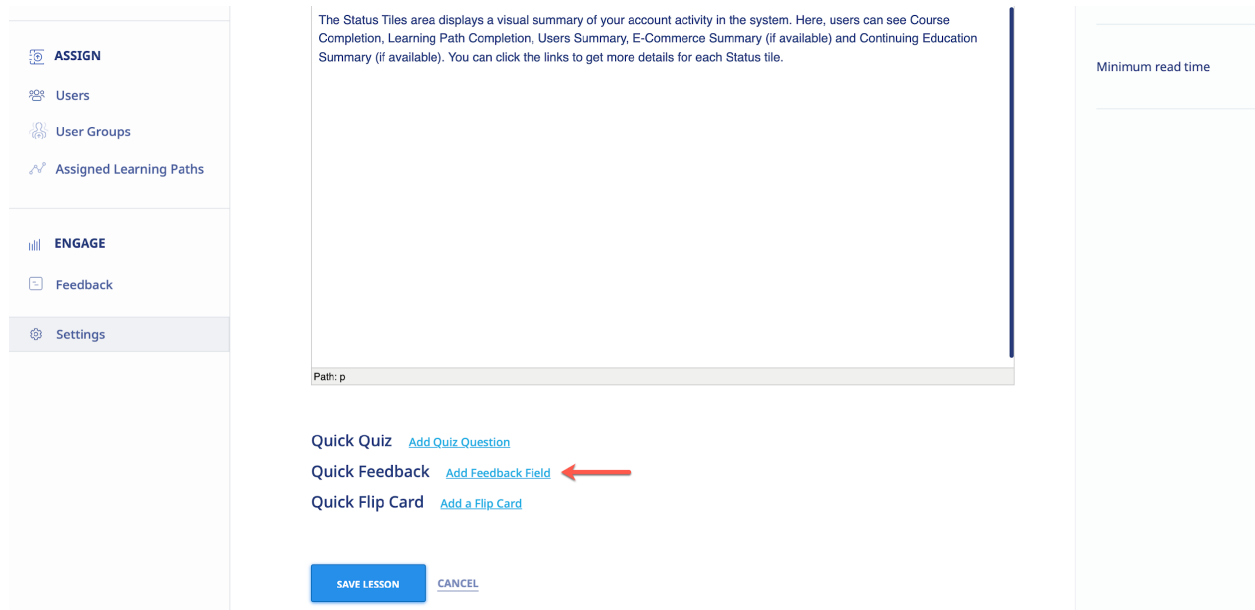
Your uploaded and embedded file will look something like this:

Quick Quiz

Quick quiz is a tool which enables content creators to add in lesson assessments for learners. These quick quizzes are not graded. They are simply meant to help reinforce comprehension. To add a quick quiz, the **add quiz question** button. Clicking the **add quiz question** link displays any quiz questions that you have already added to the system, which you can then use as part of the Lesson. Please refer to [Quiz](#) section of the document for details on creating Quizzes and Quiz Questions.

Quick Feedback

To add quick in eLeaP, go to the edit mode of your lesson and click the [Add feedback field] link (you can also add quick feedback in lesson view mode):



You can then select an existing feedback field to add or create new feedback for your lesson. Click [Submit] to add to the current lesson.

Add New Field

Field Name*

Do you understand the lesson content?

Type *

Combo List

Value list *

Yes, No

comma delimited (i.e. easy,medium,hard)

Required ☐

Lesson

Adding v3 - SOP

SUBMIT

Quick Flip Card

To create a flip card in eLeaP, go to the edit mode of your lesson and click the [Add a flip card] link (you can also add a flip card in lesson view mode):

Content *

Quick Quiz [Add Quiz Question](#)

Quick Feedback [Add Feedback Field](#)

Quick Flip Card [Add a Flip Card](#)

Settings

Is the lesson active? ☐

Minimum read time

SAVE LESSON **CANCEL**

Next, enter the word or term and the definition and click [Submit]

Flip Cards require pre-created glossary terms. Add your term below to continue.

Add New Term

Word *I

Definition *

Lesson
Video

SUBMIT

Once everything looks good, click [Save Lesson] to finalize the Flip Card.

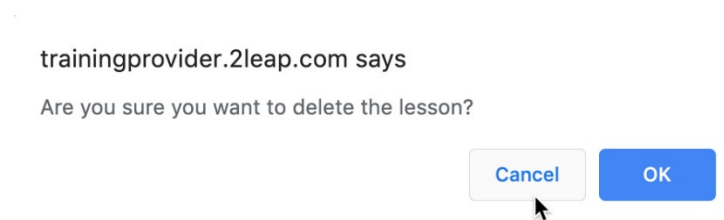
Editing a Lesson

Selecting the **edit title** link for a Lesson allows you to modify its existing Title. When you have changed the title, click **SAVE LESSON**, as shown in the following illustration.

The screenshot displays the 'Lesson Edit' interface. On the left, there is a 'Title *' field with the placeholder text 'Change lesson title here'. Below it is a large 'Content' area with a rich text editor toolbar. At the bottom of the content area, there is a 'Path: p.' field and a 'Quiz Questions' section with an 'ADD NEW QUESTION' link. On the right side, there is a 'Files Attachments' section with a 'Click to add files' link and a 'CHOOSE FILES' button. Below this, there is a file entry 'Eyes of Haiti-story...' with a '14.21 KB' size and an 'Embed' toggle switch. Further down, there is a 'Settings' section with a toggle for 'Is the lesson active?' and a 'Limited completion time' field with 'Min : Sec' input.

Deleting a Lesson

You can delete a Lesson by clicking its **DELETE** link. As shown in the following illustration, the system displays a warning message before proceeding with the deletion. Simply click **OK** to proceed with the deletion or click **Cancel** to cancel the deletion process.

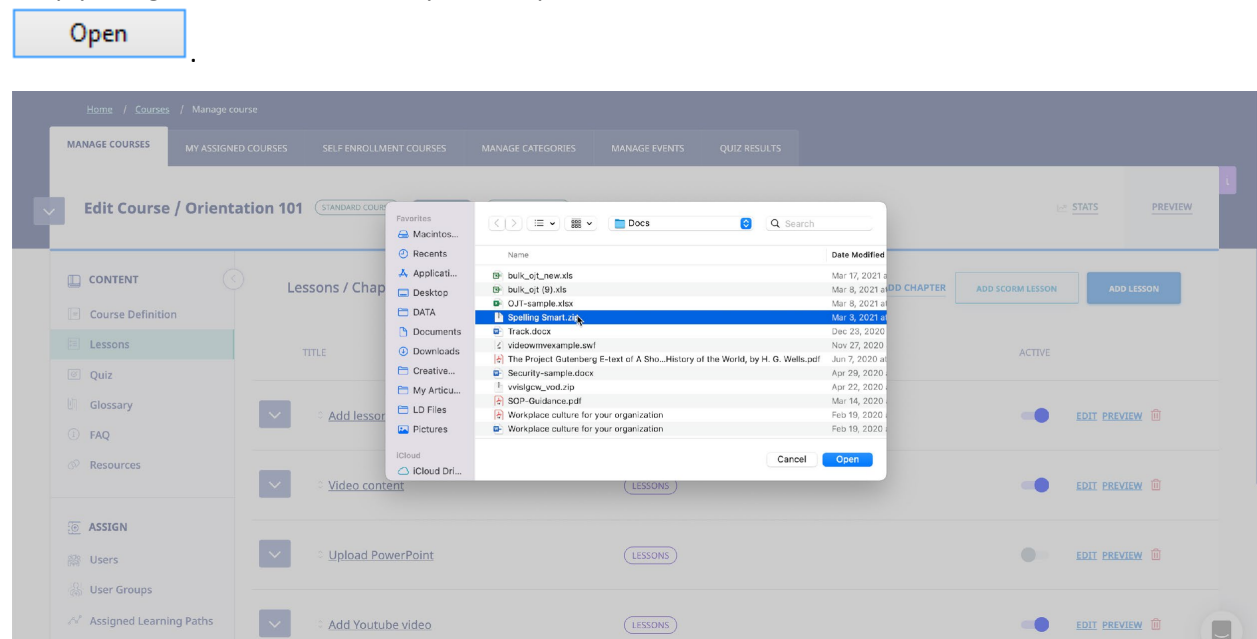


Importing SCORM Content

Sharable Content Object Reference Model (SCORM) is a collection of standards and specifications for web-based e-learning. It defines communications between client-side content and a host system (called

"the run-time environment"), which is commonly supported by a learning management system. SCORM also defines how content may be packaged into a transferable ZIP file called "Package Interchange Format."

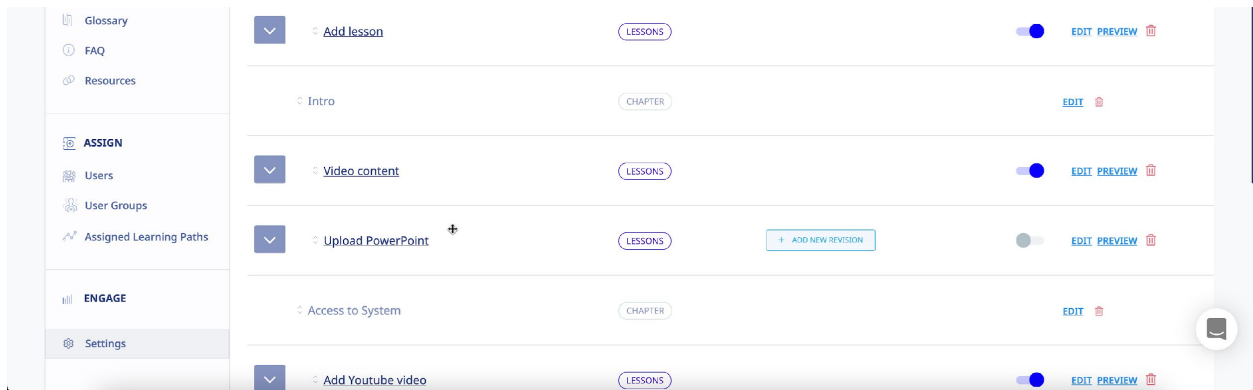
To add a SCORM lesson, click [ADD SCORM LESSON](#). Clicking the **[ADD SCORM LESSON]** link expands the screen, so that you can navigate to the location on your computer where the existing SCORM content in zip format is stored. A **Choose File to Upload** dialog, as shown in the illustration below, is displayed. Simply navigate to the location on your computer where the file is stored, select it, and then click



As shown in the following illustration, the file you've selected now populates the **File to Upload** field. Note that when your SCORM import is completed, your new lesson will automatically be created.

Re-Ordering Lessons

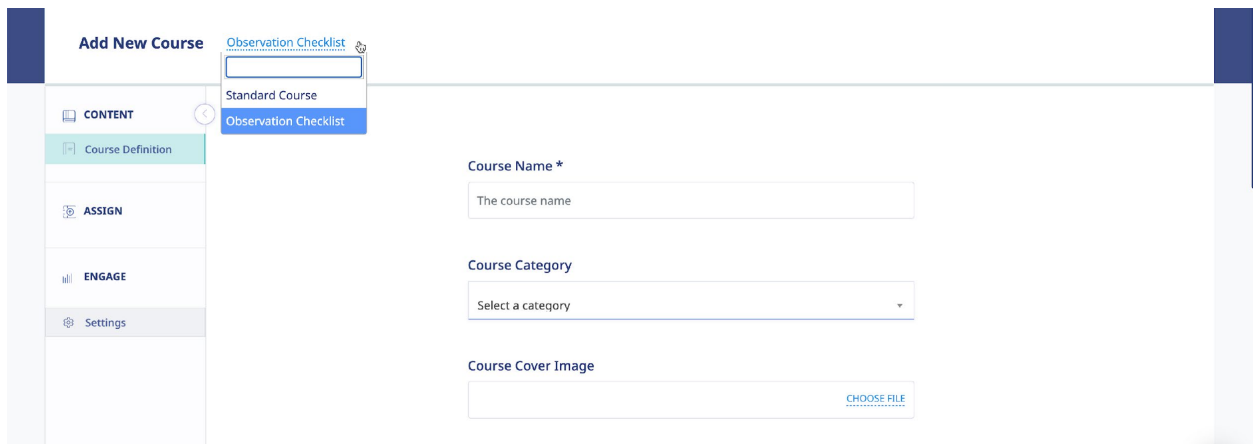
You can reorder the order of your lessons by using the drag-and-drop feature. To re-order a lesson, simply left-click on the lesson and drag it to the appropriate location.



Adding an Observation Checklist Course

An Observation Checklist course is a type of course which allows Administrator and Supervisor level users to perform in-person assessments of learners in order to document skills and proficiency.

To create an Observation Checklist course, click the **ADD NEW COURSE** button and enter in the name of the course. Then select the type of course by clicking the dropdown arrow and selecting [Observation Checklist].



Once selected, simply click the **SAVE** button to begin creating your assessment statements.

CONTENT

Course Definition

Statements

ASSIGN

Users

User Groups

ENGAGE

Settings

ADD NEW STATEMENT

Description

[Add a checklist description](#)

Statements

There are no statements yet.

Add New Statement


Statement

Grading Type


Binary: Yes/No

ADD STATEMENT

Add/Edit Observation Checklist Statements

Once you add your Observation Checklist course, you should be in the Observation Checklist Statements page. If you are not, click the  **Statements** tab to begin adding or editing your Observation Statements.

Add a description

Adding a description will help the assessor performing the assessment understand and communicate to the learner the “what” and “why” for performing this assessment. To add a description, click the link [ADD A CHECKLIST DESCRIPTION](#) then enter your description and click .

Remember, you can always come back and edit the description. To edit the description, click the [Edit] link next to the description.

CONTENT

ASSIGN

ENGAGE

Settings

Description

[ADD A CHECKLIST DESCRIPTION](#)

To prepare yourself for a student teacher role, familiarize yourself with the roles and responsibilities of a student teacher.

SAVE

Add an Observation Checklist Statement

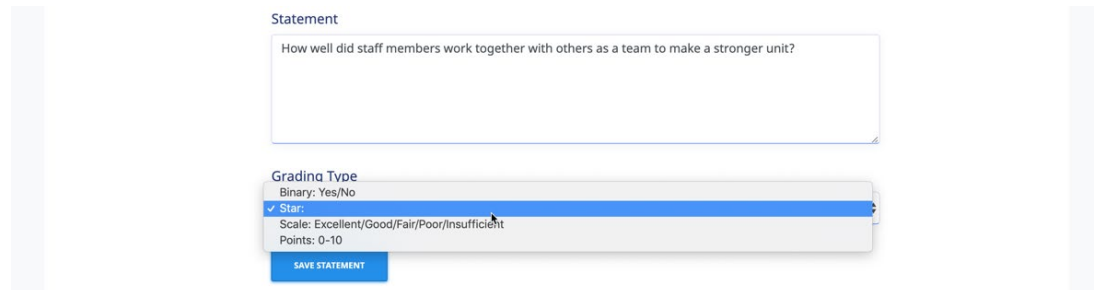
To add a statement for your Observation checklist, simply select if you want to enter a [Gradable] or [Non-Gradable] statement.

Gradable Statements:

If you select a Gradable statement type, your options are: Binary, Star, Scale, or Points.

Once you determined your grading type, enter the statement into the box, select the *Grading Type*, and click the **ADD STATEMENT** button.

Here's an example:

A screenshot of the eLeaP interface for adding a statement. It shows a text box with the statement "How well did staff members work together with others as a team to make a stronger unit?". Below the text box is a dropdown menu for "Grading Type" with options: "Binary: Yes/No", "✓ Star:", "Scale: Excellent/Good/Fair/Poor/Insufficient", and "Points: 0-10". The "Star" option is selected. At the bottom of the dropdown is a blue button labeled "SAVE STATEMENT".

Active Listening - *Giving full attention to what other people are saying, taking the time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.*

To assess this statement using a **Yes/No** grading type, simply select that grading type and click

ADD STATEMENT.

Observation Checklist Gradable Statement Types

There are four (4) grading types for Observation Checklist statements:

1. **Binary (Yes or No):** The binary grading type is for when you simply need a yes or no assessment result for a statement, i.e. can the learner do this action or not?
2. **Star:** Star assessments are useful if you want to award an increasing level of proficiency for an assessment. This is simple and almost universally understood. The Star grading starts at 1 star to a maximum of 5 stars. Typically, the higher the number of stars, the higher the value of the assessment.
3. **Scale:** The scale grading type is like the Star grading type except you now have specific descriptions for what each level or proficiency equates to. The Scale ranges from "Excellent" to "Poor". It also includes "Good", "Fair" and "Insufficient" levels.
4. **Points:** The points grading type is designed to allow you to customize your own level or values for the assessment. If you prefer to award specific points for each statement, the Point grading type works best.


Observation Checklist Non-Gradable Statement Types:

Non Gradable statements allow you to collect input-type data or even upload documents or files as part of the assessment. eLeaP currently has three types of non gradable observation statements:





1. **Text Field:** This is simply a text input box where data can be entered. An example of this type of statement can be, "what do you think about the new equipment?"
2. **Custom Dropdown:** A custom dropdown enables you to create a pre-determined answer options for the assessment statement. For example, "what department do you work?" and the custom dropdown options being "Engineering", "Sales", "Customer Service". Enter the Custom Dropdown statement and use the [+] button to add the dropdown selector options.
3. **Upload File:** The upload file statement type is used if you want to upload a file or document as part of the assessment. An example of this could be a signed employee policy, or other documents.

Activating/Editing/Ordering Statements

Your observation checklist statements are in inactive status by default. This is to give you the choice of selecting which statements end up being used in your live assessments.

- To activate a statement, simply toggle active/inactive .
- To edit or delete an existing statement, click the [EDIT](#) [DELETE](#) links.



Here's an example of my list of active and inactive statements:

Statements			
STATEMENT	GRADING TYPE	ACTIVE	ACTIONS
Yes or no	Binary: Yes/No		EDIT DELETE
Upload your agreement	Upload File		EDIT DELETE
Scales	Scale: Excellent/Good/Fair/Poor/Insufficient		EDIT DELETE
What do you think of gas prices?	Text Field		EDIT DELETE

Assigning an Observation Checklist Course

Note: Observation Checklist courses are to be used for performing physical assessments of skills and proficiencies. This means they are going to be performed by a system administrator or a designated Supervisor level user.



Assigning to users:

Observation checklists can be assigned to specific users. Simply click on the  **Users** submenu item under the  **ASSIGN** section of the course submenu. (You will need to activate your course prior to the assignment).

Then click the **ASSIGN NEW USERS** button. Select the users you want to assign to be assessed.

Note: **No emails** are sent to individual users regarding Observation Checklist courses.

Assigning to user groups:

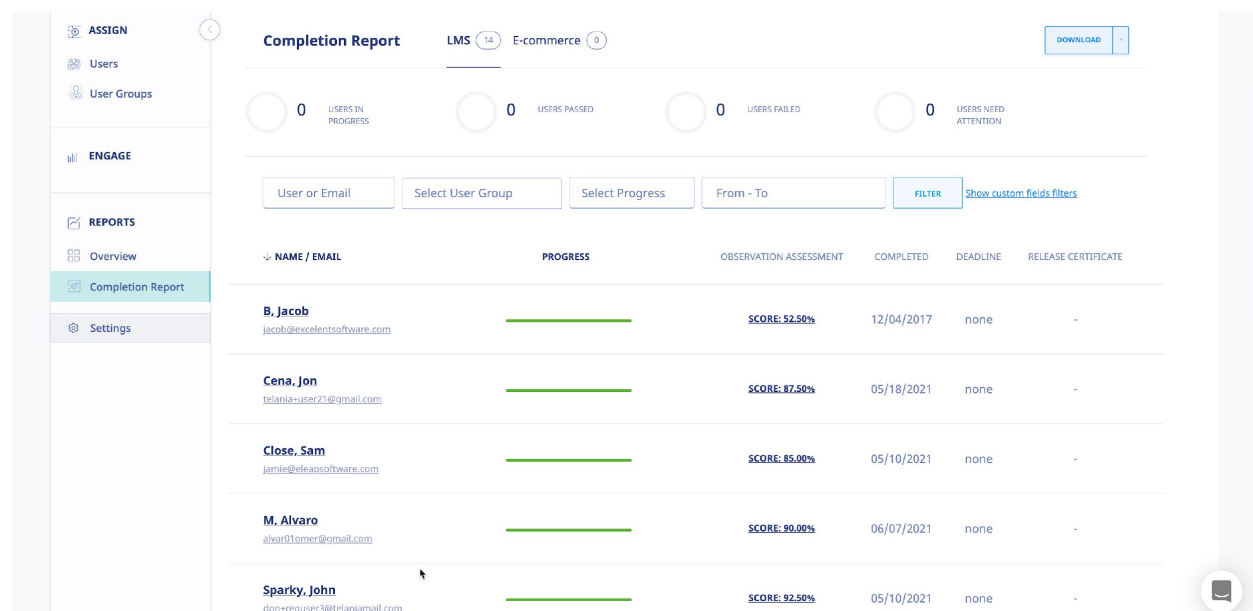
To assign an Observation Checklist to user groups, click the  **User Groups** submenu item under the  **ASSIGN** section of the course submenu. Then click the **ASSIGN NEW USER GROUPS** link and select the relevant user groups to be assigned and assessed.

Note: While **no emails** are sent to individual users within the assigned user group regarding this Observation Checklist course if a Supervisor is assigned to manage the assigned user group, the supervisor will receive a notification regarding a pending assessment.


How to perform an Observation Checklist Assessment

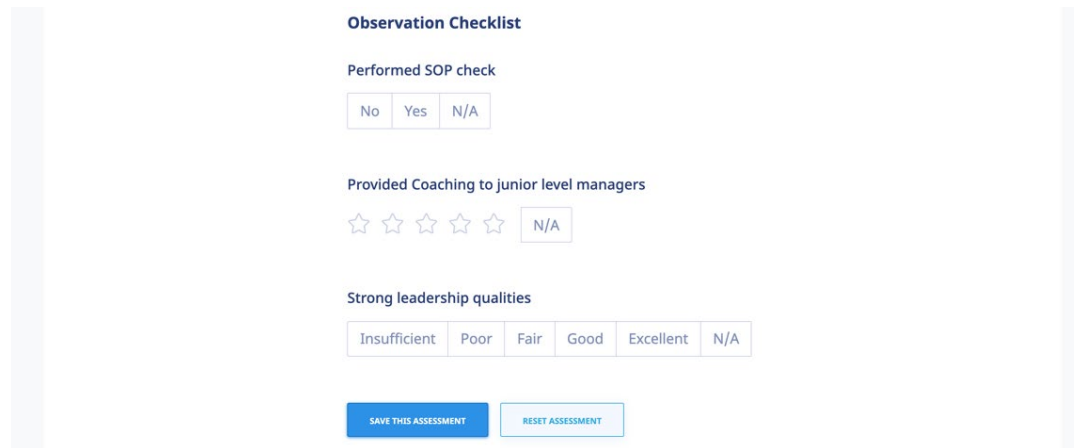
Administrator performing assessments:

As an Administrator, you can perform an Observation Checklist assessment. Once an Observation Checklist course has been assigned to individual users or user groups, click on the **ASSESSMENTS** tab to begin performing your assessment.



NAME / EMAIL	PROGRESS	OBSERVATION ASSESSMENT	COMPLETED	DEADLINE	RELEASE CERTIFICATE
B. Jacob jacob@exceleantsoftware.com	<div></div>	SCORE: 52.50%	12/04/2017	none	-
Cena, Jon telania-user21@gmail.com	<div></div>	SCORE: 87.50%	05/18/2021	none	-
Close, Sam jamie@eleasoftware.com	<div></div>	SCORE: 85.00%	05/10/2021	none	-
M. Alvaro alvaro1omer@gmail.com	<div></div>	SCORE: 90.00%	06/07/2021	none	-
Sparky, John don-ereguser3@telaniamail.com	<div></div>	SCORE: 92.50%	05/10/2021	none	-

Click the  button next to each assigned user to begin your assessment.

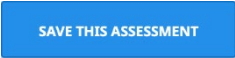


The image shows a screenshot of the 'Observation Checklist' form. It contains three sections: 'Performed SOP check' with buttons for 'No', 'Yes', and 'N/A'; 'Provided Coaching to junior level managers' with five star icons and an 'N/A' button; and 'Strong leadership qualities' with buttons for 'Insufficient', 'Poor', 'Fair', 'Good', 'Excellent', and 'N/A'. At the bottom are two buttons: 'SAVE THIS ASSESSMENT' and 'RESET ASSESSMENT'.

Click or, if on a mobile device, tab the various assessment grading options. For example, if you agree with **Yes** as the appropriate assessment for the binary statement, select or tab the [Yes] option.

Provided Coaching to junior level managers



If you need to save the current assessment and come back later, you can. Simply click the  button. This button also works to finalize the assessment and move on to the next learner to be assessed.

An assessment that is completed will show an assessment score ([SCORE: 80.00%](#)) in the Completion Report tab. In incomplete assessment will show an [IN PROGRESS](#) status.

To continue assessing an incomplete checklist, click the [IN PROGRESS](#) link.

Supervisor performing assessments:

Supervisors can help Administrators manage and perform Observation Checklist assessments. However, for a Supervisor to view and perform assessments, two conditions need to be met:

- The Supervisor must be assigned to manage the assigned User Group(s)
- The Supervisor managed user group must be assigned to the Observation Checklist course using the **ASSIGNED USER GROUPS** tabs. This means that even if members of a user group that is managed by a supervisor are assigned individually to an Observation Checklist course, the associated Supervisor will not be able to view and perform that assessment.

If the two conditions above are met, the assigned Supervisor will receive an email notification regarding a pending Observation Checklist course.

A Observation Checklist Course has been assigned to: Observation Group 1

Inbox x Software Dev x



the Easy
to eLeaP

3:32 PM (0 minutes ago)



Susan ,

The User Group you supervise (Observation Group 1), has been assigned to the following Observation Assessment course: **Telephone Operator - Skills Assessment**.

Please go to the [Observation Assessments](#) section of your account to access and complete your assigned Observation Assessments.

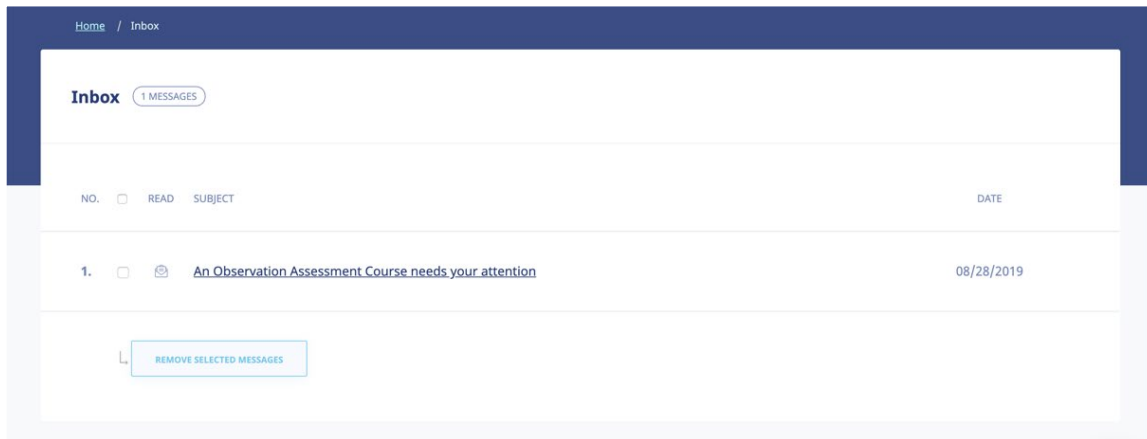
Please note: This e-mail was sent from a notification-only address that cannot accept incoming e-mail. Do not reply to this message. Instead send your reply to help@eleapsoftware.com.


If you have received this email in error, please forward it immediately to support@eleapsoftware.com or contact eLeaP at www.eleapsoftware.com.

Sent: 06.25.2017 15:31

The supervisor can click on the [Observation Assessments](#) link to go directly to the assigned and pending assessment.

Supervisors should also check their INBOX section of their accounts for additional notifications.



Once on the relevant Observation Checklist course to be assessed, the Supervisor can begin by clicking the  button next to the learners' name.

[Home](#) / [User Groups](#) / [Observation Assessments](#)

MEMBERSHIP

GROUPS YOU SUPERVISE

ASSESSMENTS

Observation Assessments 4 TOTAL ASSESSMENTS

Assessment

APPLY FILTERS

NO.	NAME	COURSE	PROGRESS	OBSERVATION ASSESSMENT	COMPLETED	DEADLINE	ASSESSOR
1.	Butler, Jeremy	Assessment	0% NOT STARTED	<div>▶ START</div>	-	none	-
2.	Johnson, Sam	Assessment	0% NOT STARTED	<div>▶ START</div>	-	none	-
3.	Karanzalis, Linda	Assessment	0% NOT STARTED	<div>▶ START</div>	-	none	-
4.	C - Account with Data, Antonia	Assessment	0% NOT STARTED	<div>▶ START</div>	-	none	-

The Observation Checklist tool is designed to be used on any device any time anywhere. We encourage you to access and perform assessments on mobile devices, laptops and other devices. Once the Supervisor clicks the

▶ START

 button next to each assigned user, they see a mobile responsive version of the tool to enable them easily perform their assessment.

Clothing and other personal belongings must be stored in designated areas (lockers)

Insufficient Poor Fair Good Excellent N/A

Refrains from wearing jewelry like watches, multiple rings, ear, nose, tongue, eye, belly piercings or rings (exception one smooth ring (no stones) on finger)

No Yes N/A

Use devices only in designated areas during breaks, lunch, before and/or after work. (cell phone, iPods, blue tooth, radio, pager, MP3, handheld games)

0 1 2 3 4 5 6 7 8 9 10 N/A

Areas left in a clean and organized state at the end of each break and shift

★★★★★ N/A

Wears hearing protection in the manufacturing areas or in designated areas

★★★★★ N/A

SAVE THIS ASSESSMENT RESET ASSESSMENT

to select the relevant course:

Click or, if on a mobile device, tap the various assessment grading options. For example, if you agree with **Yes** as the appropriate assessment for the binary statement, select or tap the **[Yes]** option.

If you need to save the current assessment and come back later, you can. Simply click the

SAVE THIS ASSESSMENT

button. This button also works to finalize the assessment and move on to the next learner to be assessed.

An assessment that is completed will show an assessment score (**SCORE: 80.00%**) in the Completion Report tab. In incomplete assessment will show an **IN PROGRESS** status.

To continue assessing an incomplete checklist, simply click the **IN PROGRESS** link.

Selecting Additional Observation Checklist Courses:

To select additional Observation Checklist courses to assess, use the drop-down selector

Once you select the relevant course, click the [APPLY FILTERS](#) button to see the assigned users to be assessed. Use the [▶ START](#) button to begin performing your assessment.

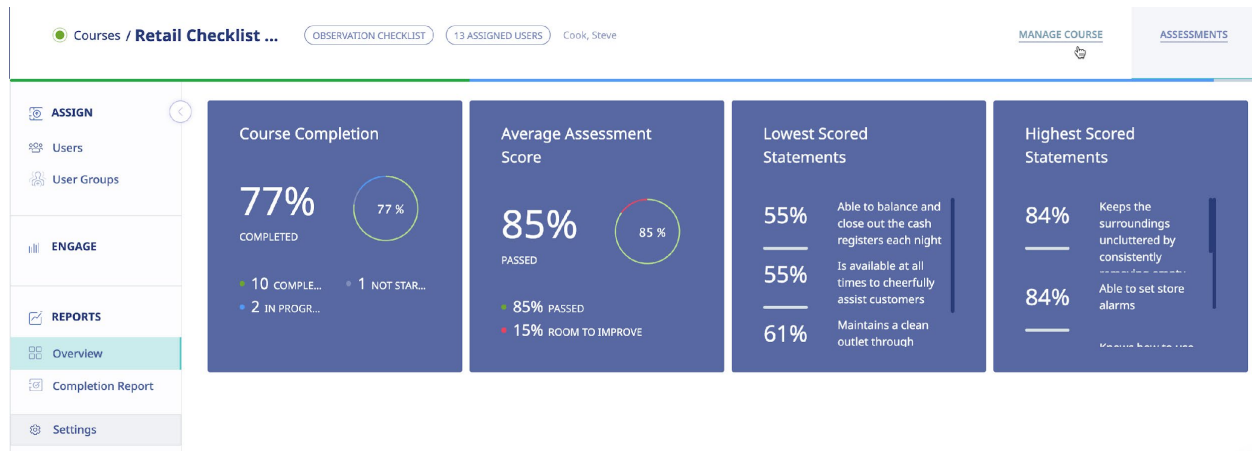
Note: As a supervisor, you can also perform assessments from the **User Group Activity** report page for user groups you supervise. Simply, select the relevant course and if there are pending users to be assessed you will see the [▶ START](#) button next to their names.

Observation Assessment – Reports & Files

To access and download Observation Checklist(OC) type courses data, you have several options:

Stats Overview:

The Stats Overview gives you a summary of your OC course including Course Completion, Average Assessment Score, Lowest and. Highest Scored Statements.




Completion Report

See details of your OC course completion by going to the [Completion Report] section of your Stats. From here you can see individual user reports, progress status, scores as well as date completed.

Use the filtering options to drill down into your report data.

Downloading Reports

To download reports from your OC course, you have several options:

Click the  button to get the download options below.

- **Completion Report as XLS:** Download this report to capture the on-screen data on completion.
- **Completion Report as PDF:** Download a PDF version of the completion report summary data.
- **Assessment Data as XLS:** Download the assessment data details in an Excel format.


Additional Report Options

- [Reports] > [HDD Report] > Files in OC Assessments
- [Reports] > [Feedback Reports] > Observation Course Feedback

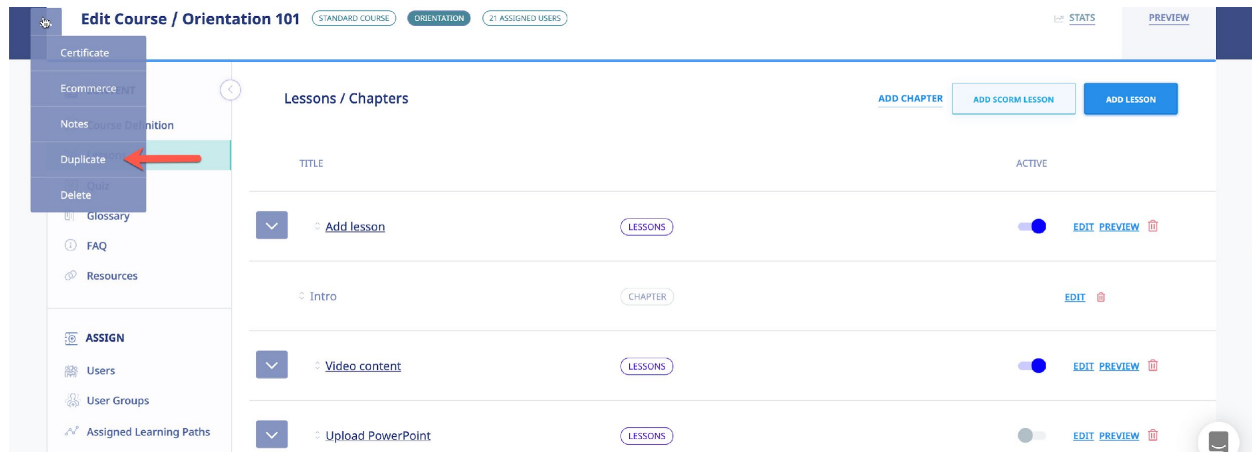
Other Course Meta Features

Duplicating a Course

There may be times when you want to make use of a Course's Chapters and Lessons, but perhaps add additional content to it, or remove content from it, to create a new Course. The **Duplication** option makes this a much quicker process than creating an additional Course from scratch. To duplicate a course, click the **Course Submenu dropdown** arrow

 **Edit Course / Orientation 101** **STANDARD COURSE** **ORIENTATION** **21 ASSIGNED USERS** in the Course

Management tab.



As shown in the following illustration, the system displays a warning message before proceeding with the duplication.

Click [OK](#) to proceed with the duplication or click [Cancel](#) to cancel the duplication process.

trainingprovider.2leap.com says

Are you sure you want to duplicate this course?

[Cancel](#)

[OK](#)

As shown in the following illustration, the system confirms that the Course has been duplicated, and you can click the **View new course** link to display the new Course.

The screenshot shows the 'Edit Course / Orientation 101' interface. At the top, there's a green banner with the message: 'The course has been duplicated (View new course)'. Below this, the left sidebar contains a 'CONTENT' section with links for 'Course Definition', 'Lessons', 'Quiz', 'Glossary', 'FAQ', and 'Resources'. The 'Lessons' link is highlighted. The main area is titled 'Lessons / Chapters' and contains a table with columns 'TITLE' and 'ACTIVE'. The table lists three items: 'Add lesson' (with a 'LESSONS' tag), 'Intro' (with a 'CHAPTER' tag), and 'Video content' (with a 'LESSONS' tag). Each item has an 'EDIT PREVIEW' button. At the top right of the main area, there are buttons for 'ADD CHAPTER', 'ADD SCORM LESSON', and 'ADD LESSON'. The top right of the interface shows 'STATS' and 'PREVIEW' tabs.

As shown in the following illustration, the **Manage course** screen for the duplicated course is displayed, and you can now use any of the links and functionality available on this screen to modify the Course's details and create an additional course.

The screenshot shows the 'Edit Course / Orientation 101 : DUPLICATE' interface. The left sidebar is identical to the previous screenshot, with 'Lessons' highlighted. The main area is titled 'Lessons / Chapters' and contains the same table with 'Add lesson', 'Intro', and 'Video content' items. The top right of the interface shows 'STATS' and 'PREVIEW' tabs. The title bar at the top indicates 'Edit Course / Orientation 101 : DUPLICATE'.

Additionally, the duplicated Course is displayed on the **Courses** list within the **Courses** screen, as shown in the following illustration.

Manage Courses (472 TOTAL COURSES (61 TO 80 SHOWN))									
<div>Search for a course by name <input type="text"/></div> <div>Filter courses by categories <input type="text"/></div> <div>Course Type <input type="text"/></div> <div>Show Only <input type="text"/></div> <div>APPLY FILTERS</div> <div>CLEAR</div>									
COURSE NAME/INSTRUCTOR	SKILLS	CREDITS	CATEGORY	# OF USERS	PROGRESS	DATE CREATED	ACTIVE		
<u>T3 Orientation Course 101</u> Cook, Steve	DELEGATION		PROCESS IMPROVEMENT	3 USERS	<div></div>	02/22/2022	<input checked="" type="checkbox"/>	<input type="checkbox"/>	EDIT
<u>New Hire Training 101 : DUPLICATE</u> Cook, Steve			ORIENTATION	1 USERS	<div></div>	02/22/2022	<input checked="" type="checkbox"/>	<input type="checkbox"/>	EDIT
<u>New Hire Training 101</u> Cook, Steve	CULTURAL COMPETENCE		ORIENTATION	8 USERS	<div></div>	02/22/2022	<input checked="" type="checkbox"/>	<input type="checkbox"/>	EDIT
<u>SOP 553367 : esign : DUPLICATE</u> Cook, Steve	INACTIVE		PHARMACY	1 USERS	<div></div>	02/21/2022	<input type="checkbox"/>	<input type="checkbox"/>	EDIT
<u>SOP 553367 : esign</u> Cook, Steve		3 CPE	PHARMACY	1 USERS	<div></div>	02/21/2022	<input checked="" type="checkbox"/>	<input type="checkbox"/>	EDIT

Editing a Course Title

Clicking a Course's [EDIT](#) option on the **Courses** list allows you to make modifications to that Course including the title using the **Course Definition** screen, as shown in the illustration below.

<div>Search for a course by name <input type="text"/></div> <div>Filter courses by categories <input type="text"/></div> <div>Course Type <input type="text"/></div> <div>Show Only <input type="text"/></div> <div>APPLY FILTERS</div> <div>CLEAR</div>									
COURSE NAME/INSTRUCTOR	SKILLS	CREDITS	CATEGORY	# OF USERS	PROGRESS	DATE CREATED	ACTIVE		
<u>T3 Orientation Course 101</u> Cook, Steve	DELEGATION		PROCESS IMPROVEMENT	3 USERS	<div></div>	02/22/2022	<input checked="" type="checkbox"/>	<input type="checkbox"/>	EDIT
<u>New Hire Training 101 : DUPLICATE</u> Cook, Steve			ORIENTATION	1 USERS	<div></div>	02/22/2022	<input checked="" type="checkbox"/>	<input type="checkbox"/>	EDIT
<u>New Hire Training 101</u> Cook, Steve	CULTURAL COMPETENCE		ORIENTATION	8 USERS	<div></div>	02/22/2022	<input checked="" type="checkbox"/>	<input type="checkbox"/>	EDIT
<u>SOP 553367 : esign : DUPLICATE</u> Cook, Steve	INACTIVE		PHARMACY	1 USERS	<div></div>	02/21/2022	<input type="checkbox"/>	<input type="checkbox"/>	EDIT
<u>SOP 553367 : esign</u> Cook, Steve		3 CPE	PHARMACY	1 USERS	<div></div>	02/21/2022	<input checked="" type="checkbox"/>	<input type="checkbox"/>	EDIT

Simply make any necessary changes to the Title within the **Title** field and click [SAVE](#).

The screenshot shows the eLeaP course editor interface. At the top, the course title 'Orientation 101 : DUPLICATE' is displayed. On the left, a sidebar menu is visible with categories: CONTENT (including Course Definition, Lessons, Quiz, Glossary, FAQ, and Resources) and ASSIGN (including Users, User Groups, and Assigned Learning Paths). The main area contains three form fields: 'Course Name *' with the value 'Orientation 101 : DUPLICATE', 'Course Category' with a dropdown menu showing 'Orientation', and 'Course Cover Image' with a 'CHOOSE FILE' button.

Course Notes and Memos

Add Course Notes which will only be visible to you (admins and to specific course instructors). Course Notes enable you to add version history and notes as well general or specific information pertaining to your training.

To add a Course Note, click the **Notes** link from the Course Submenu dropdown. You can then click the **ADD NEW NOTE** link. You can now add your new Course Note including uploading Note files.

[upload a file with this note](#)

The screenshot shows the Course Note editor interface. It features a rich text editor with a toolbar containing various formatting options like bold, italic, underline, text color, background color, bulleted list, numbered list, link, and unlink. Below the toolbar is a large text area for writing the note. At the bottom of the editor is a blue **SUBMIT** button.

Search through course notes, one course at a time or search your entire collection of course notes.

Course Notes 1 TOTAL NOTES

ADD NEW NOTE ALL NOTES

Note Orientation 101 : DUP... APPLY FILTERS

NOTE	FILE	COURSE	CREATOR	POSTED ON	ACTION
Where can we get assets?		Orientation 101 : DUPLICATE	Sam, Pete	12/05/2021	EDIT DELETE

UPLOAD A FILE WITH THIS NOTE

Rich text editor interface with various formatting tools.

Deleting a Course

Clicking the **Delete** link from the Course Submenu dropdown, for a Course allows you to remove that Course from the system. Before performing the deletion, the system displays a warning message, illustrated below, to ensure that is your intention. Enter the word 'DELETE' and then click the [DELETE] button to proceed with the deletion or click **Cancel** to cancel the deletion process.

Delete This Course

This will delete this course and ALL associated data: Chapters, Lessons, Quiz Results, Feedback, etc. Deletion is FINAL and irrecoverable. Data recovery charges of \$150 per course will apply if recovery is requested.


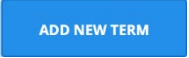
Type DELETE to confirm deletion.

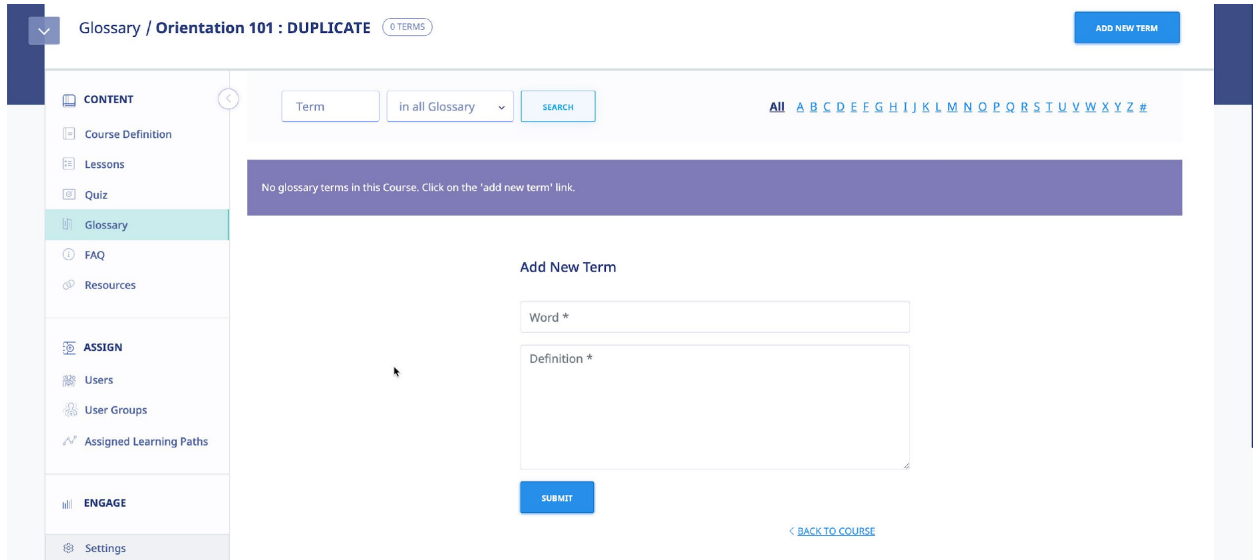
CANCEL DELETE


Please note that **all** data, including Chapters, Lessons, Quiz Results, Feedback, etc., will be removed and is irrecoverable.

Creating a Glossary

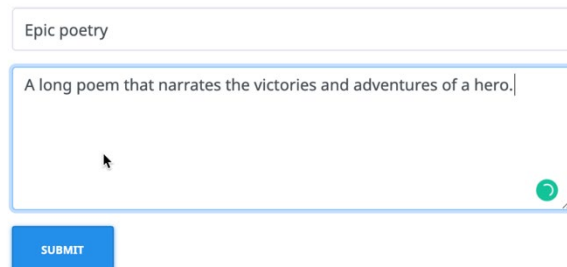
A **glossary** is a list of terms and definitions. Traditionally, a Glossary appears at the end of a book and includes terms within that book that are either newly introduced or are at least uncommon.


Clicking  **Glossary** from the Course submenu displays the **Glossary** screen, illustrated below, which allows you to add a Glossary of Terms to a Course. As shown in the illustration, click the  button to add a new Glossary Term.



The **Add New Term** screen, illustrated below, is displayed. Enter the Glossary Term within the **Word** field, the Definition for the Glossary Term in the **Definition** field, and then click  to save the Glossary Term to the system.

Add New Term



As shown in the following illustration, the Glossary Term is added to the Glossary associated with this Course. Once you have added more than one screen load of Glossary Terms, you can quickly locate specific terms for editing purposes by entering the term in the Term field and/or making a selection from the **Search Parameters** list, and then clicking .

The screenshot shows the 'Glossary / Orientation 101 : DUPLICATE' page. On the left is a sidebar with navigation links: CONTENT, Course Definition, Lessons, Quiz, Glossary (selected), FAQ, Resources, ASSIGN, Users, User Groups, Assigned Learning Paths, and ENGAGE. The main area has a search bar with 'Term' and 'In all Glossary' filters, and a 'SEARCH' button. Below the search bar is a list of terms with their definitions and 'EDIT' and 'DELETE' links. The terms listed are COBRA, Probation, Quantified Self, and Redundancy. At the bottom, there is an 'Add New Term' button and a form for adding a new term.

You can also quickly locate all of the Glossary Terms that begin with the same letter by selecting that letter on the **Letter** bar. As shown in the following illustration, clicking the letter **R** displays the Glossary Term that we just added.

This screenshot shows the same Glossary page, but with the 'at letter R' filter selected in the search bar. The list of terms now only includes 'Recruitment' and 'Redundancy', both of which start with the letter R. Red arrows point to the 'at letter R' filter and the 'R' on the 'Letter' bar. The 'Add New Term' button and form are still visible at the bottom.

You can click **add new term** as many times as necessary to add additional Glossary Terms, and you can click the **edit** link for a line on the **Glossary Terms** list to modify a term's Word or Definition, or click the **delete** link to remove that term from the Glossary.

Creating an FAQ Database

Clicking **FAQ** from the Course submenu allows you to create a database of FAQ information associated with the Course using the **FAQ** screen, illustrated below. As shown in the illustration, this screen is blank as you begin to create your FAQ material. Click the **ADD NEW FAQ** button to create a new Frequently Asked Question.

FAQ / Orientation 101 : DUPLICATE 0 FAQ ADD NEW FAQ

CONTENT

- Course Definition
- Lessons
- Quiz
- Glossary
- FAQ**
- Resources

ASSIGN

- Users
- User Groups
- Assigned Learning Paths

ENGAGE

- Settings

NO FAQ CREATED. Click on the 'add new faq' link.

Add New FAQ

Question *

Answer *

SUBMIT

[BACK TO COURSE](#)

The **Add New FAQ** screen, illustrated below, is displayed. Simply add your question in the **Question** box, enter the answer to that question in the **Answer** box, and then click **SUBMIT**.

CONTENT

- Course Definition
- Lessons
- Quiz
- Glossary
- FAQ**
- Resources

ASSIGN

- Users
- User Groups
- Assigned Learning Paths

ENGAGE

- Discuss
- Feedback
- Settings

Q: In which instances is I-9 reverification necessary? EDIT DELETE

Add New FAQ

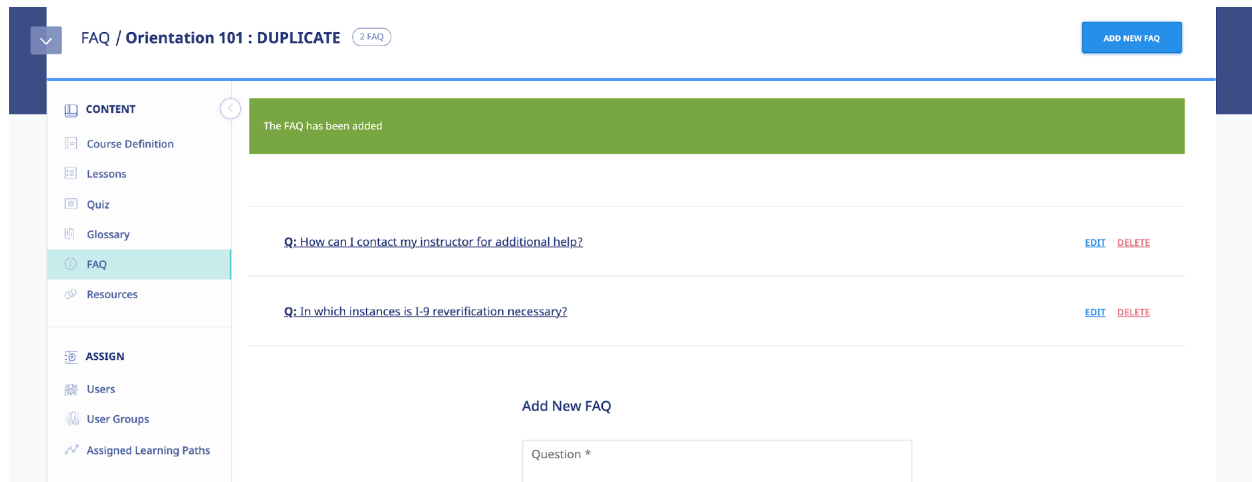
How can I contact my instructor for additional help?

Please use your instructor's contact information in the course definitions or contact eLeaP for assistance.

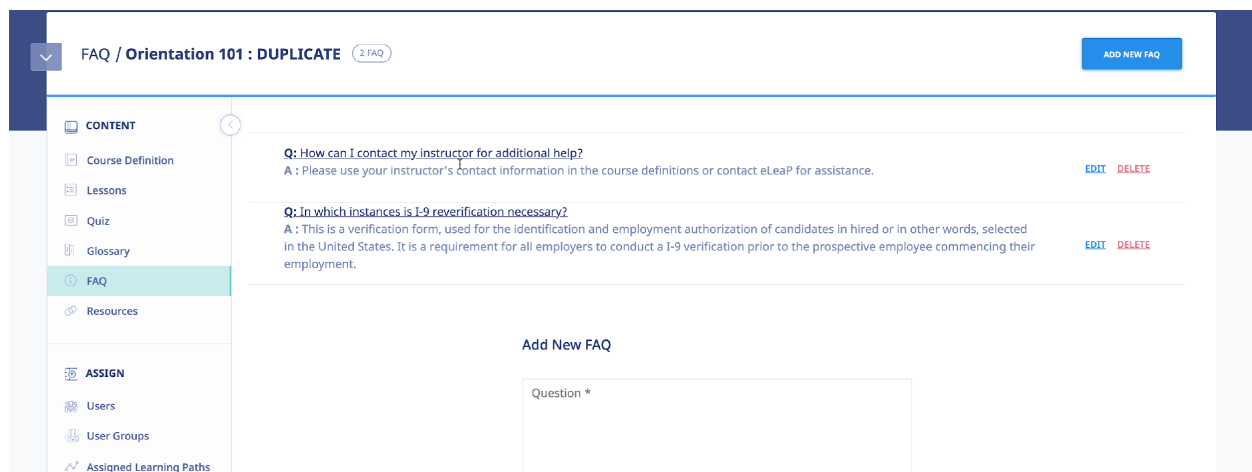
SUBMIT

[BACK TO COURSE](#)

As shown in the following illustration, the system confirms that the FAQ has been added and displays it on an **FAQ** list.



Clicking the Question on the **FAQ** list displays the answer beneath it, as shown in the following illustration.



You can now click the **ADD NEW FAQ** button to add additional FAQs, click the **edit** link to edit the currently selected FAQ, or click the **delete** link to delete the currently selected FAQ.

Adding Web Resources

Clicking **Resources** from the Course submenu displays the **Resources** screen, illustrated below, which you can use to associate various Resources with a Course via that Resource's URL. This screen will be empty the first time that you access it. You will need to click the **ADD NEW RESOURCE** button to add Resources to a Course.

Resources / Orientation 101 9 TOTAL WEB RESOURCES

ADD NEW RESOURCE

CONTENT

- Course Definition
- Lessons
- Quiz
- Glossary
- FAQ
- Resources

ASSIGN

- Users
- User Groups
- Assigned Learning Paths

NO RESOURCES CREATED. Click on the 'add new resource' link.

Add New Web Resource

Title *

URL *

SUBMIT

< BACK TO COURSE

The **Add New Web Resource** screen, illustrated below, is displayed. Enter the Resource's Title in the **Title** field, its URL in the **URL** field, and then click **SUBMIT**.

Resources / Orientation 101 9 TOTAL WEB RESOURCES

ADD NEW RESOURCE

CONTENT

- Course Definition
- Lessons
- Quiz
- Glossary
- FAQ
- Resources

ASSIGN

- Users
- User Groups
- Assigned Learning Paths

NO RESOURCES CREATED. Click on the 'add new resource' link.

Add New Web Resource

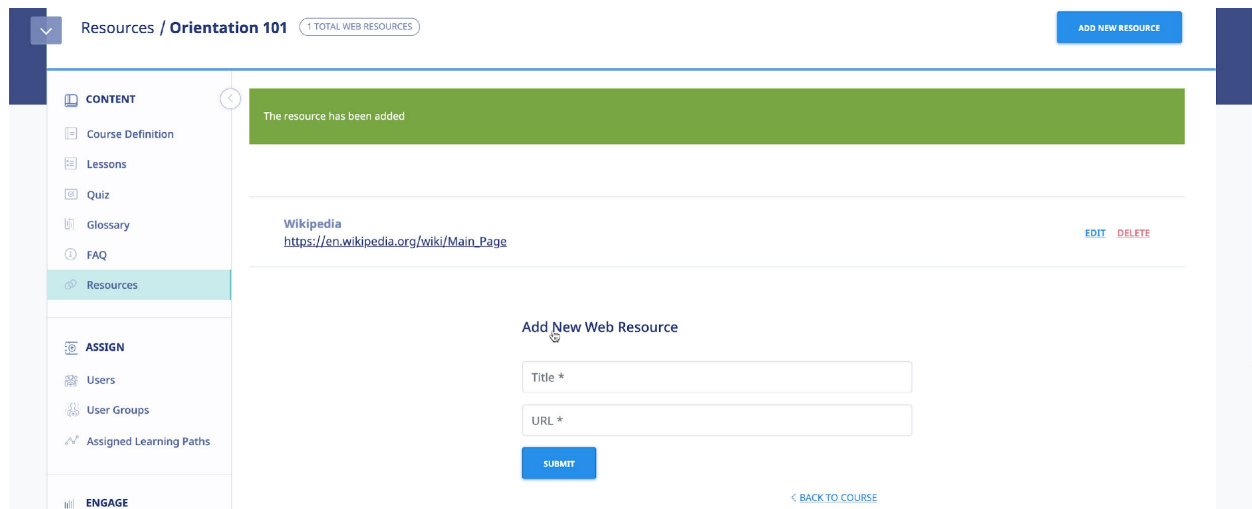
Wikipedia

https://en.wikipedia.org/wiki/Main_Page

SUBMIT

< BACK TO COURSE

As shown in the following illustration, the system confirms that the Resource has been added to the **Resources** list. You can now click the **ADD NEW RESOURCE** button to add an additional resource, click the **edit** link for the Resource to make modifications to its details, if necessary, or click the **delete** link to remove the Resource.



Feedback Assessment Tool

When the Feedback function is activated

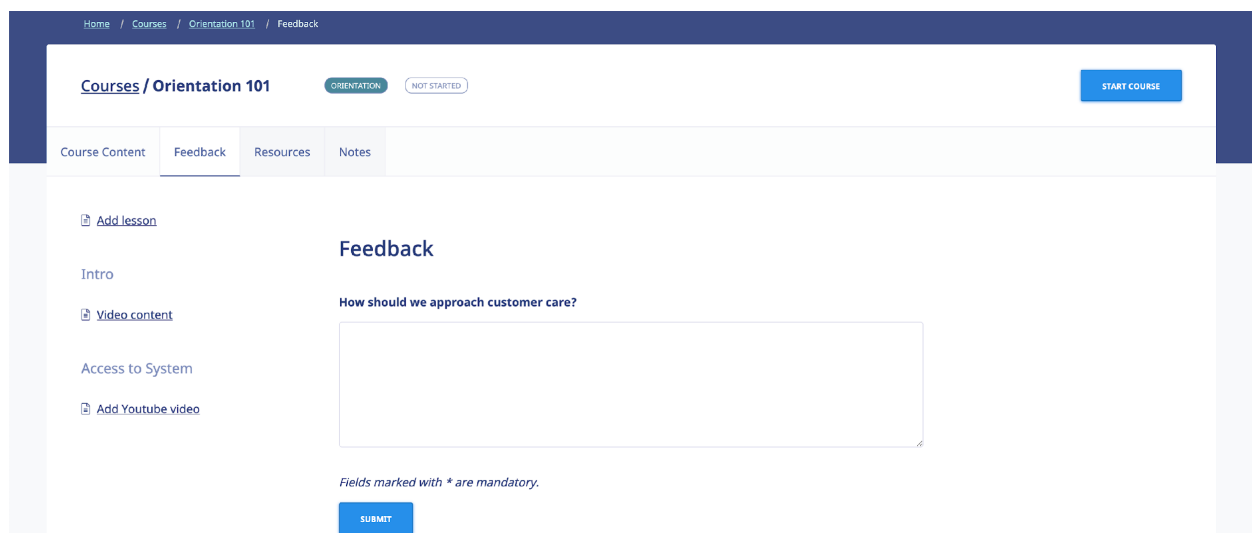


Feedback at the end of the course



Feedback

, the _____ tab will appear in the assigned course submenu, as shown in the illustration below, providing you with access to the Feedback Assessment Tool.




Post-Course Assessment or Feedback is a great tool to **measure** how well your e-learning or training program is achieving its **objectives**. Do you want to know which areas of your course need improvement? How about how effectively you are training and testing your trainees? Can you improve your use of multimedia presentations?

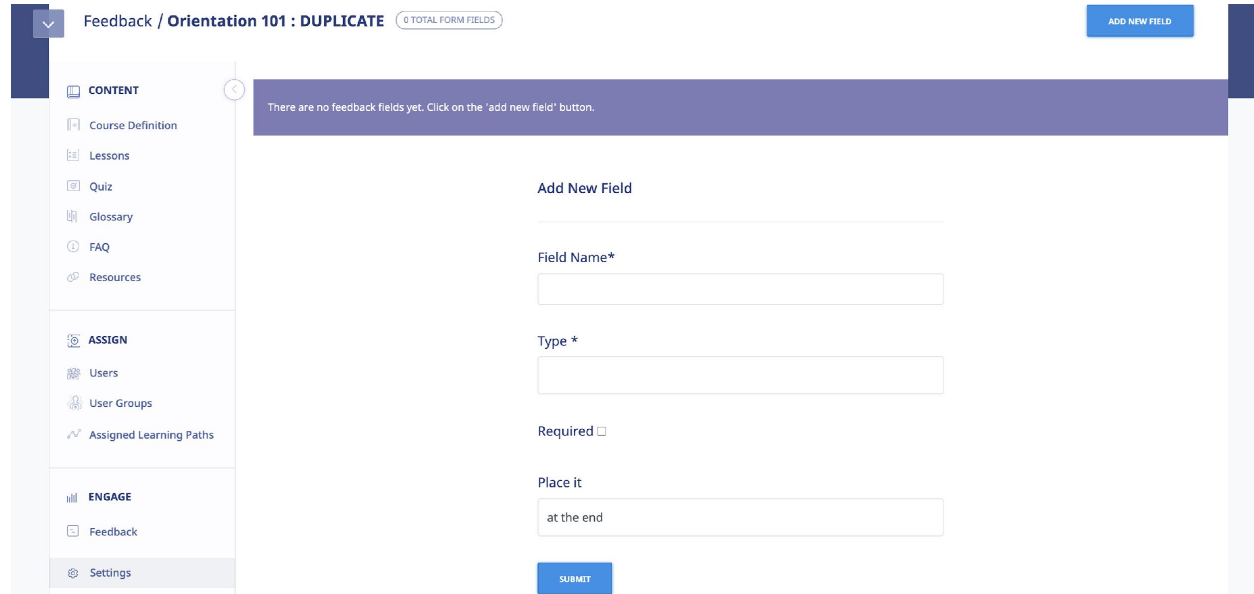
These are important questions. Use the eLeaP™ system feedback option to gather **critical intelligence**

that will enhance your e-learning and training program.

eLeaP™ wants you to succeed so we have created this simple yet powerful Post-Course Feedback assessment tool.

Add Feedback Form Fields

Clicking  **Feedback** from the Course submenu will display the **Feedback Form** screen, illustrated below. To construct a Feedback Form, begin by clicking the **ADD NEW FIELD** button, as shown in the following illustration.



Feedback / Orientation 101 : DUPLICATE 0 TOTAL FORM FIELDS ADD NEW FIELD

There are no feedback fields yet. Click on the 'add new field' button.

Add New Field

Field Name*

Type *

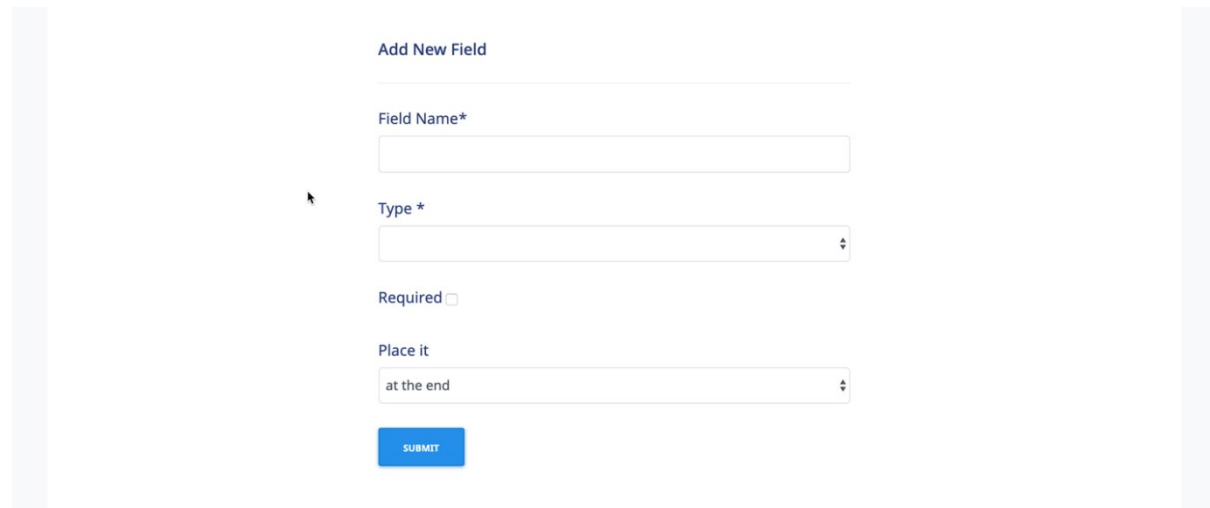
Required ☐

Place it

at the end

SUBMIT

The **Add Field** screen, illustrated below, is displayed.



1. Enter a name for the new Field in the **Field Name** field.
2. Select a type for the new Field from the **Type** list.

Types of Feedback Form Fields

1. **Title:** for user titles such as Mr., Mrs., Ms., Dr., etc.
 2. **Text Area:** for comment or short essay-type feedback
 3. **Check Box:** if you want your users to be able to check the relevant option(s).
Example of feedback options include: Yes or No, True or False, Will you take this course again, Which of these answers apply to you?
 4. **Combo List:** To allow your users to select from several options. Simply separate the various options using comma (,). For example, if you want your users to rate your course:
 - a. Field name: Please rate your experience with XYZ course.
 - b. Type: Combo List
 - c. Required: Checked
 - d. Value list: I really loved it, Not bad, Ok I guess, Horrible, Don't want to ever take this course
 - e. Place it: Wherever you like!
 - f. [Add Field]
3. Select the **Required** check box to make the new Field a required field.
 4. Make a selection from the Place it list to indicate where the new field will be placed.
Additional options will be available here once you have added a number of fields. Let's say you have created 20 feedback fields and then you realized you needed to ask for some more demographic information in field number 5; simply create the necessary new field, use the

[Place it] tool to insert the new feedback question or field in the relevant position.


5. Click **SUBMIT**. The system confirms that the new Field has been added. You can now re-use the **add new field** link to add as many additional fields as you need to complete the Feedback Form.

The screenshot shows the eLeaP Feedback Form interface. At the top, there's a breadcrumb 'Feedback / Orientation 101 : DUPLICATE' and a button 'ADD NEW FIELD'. A green banner indicates 'The field has been added'. Below this, a question 'Which do you prefer?' is displayed with an empty input field and 'EDIT' and 'DELETE' links. The 'Add New Field' section contains two input fields: 'Field Name*' and 'Type *', and a 'Required' checkbox.

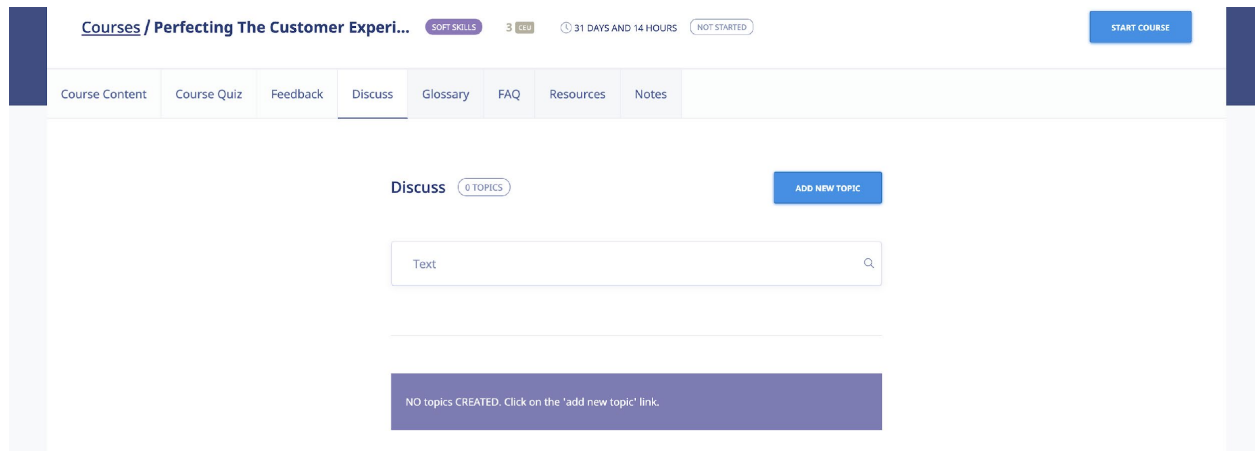
Note: Make sure you have (in your [Course Settings](#) page) toggled [Active Feedback] to **ON**. This will make your feedback assessment available to your users.

Discuss/Course-Specific Forum


When the Discuss function is activated  Discussions  in the Course Settings screen

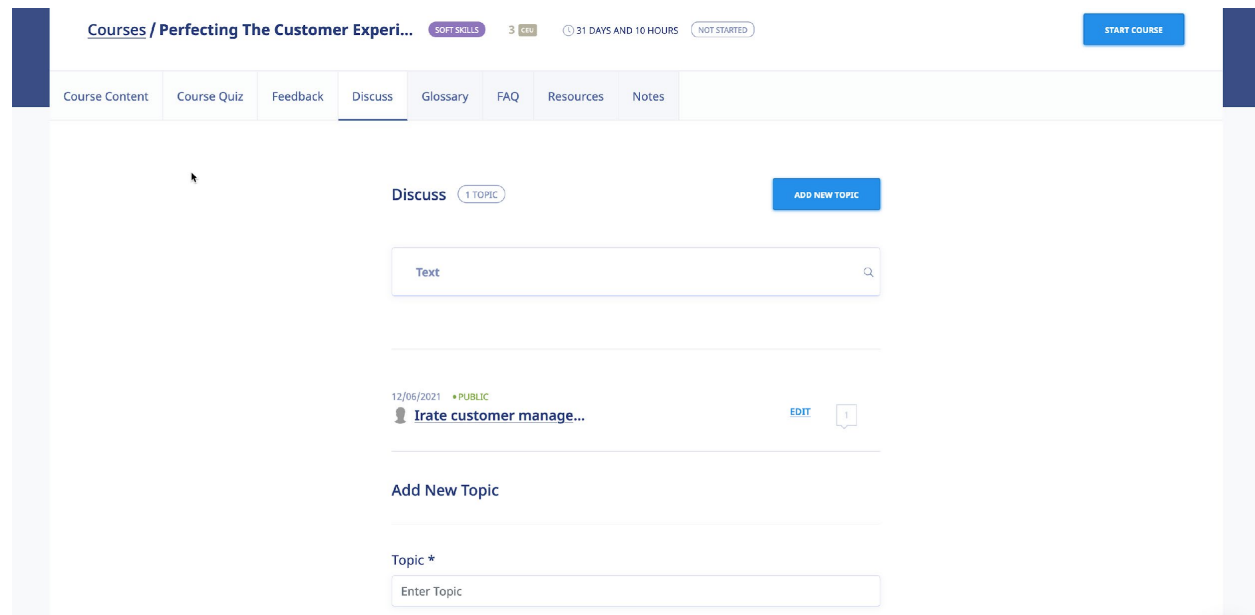
during the creation of a Course, the  icon will appear in the assigned course submenu, as shown in the following illustration, providing you with access to a course-specific discussion board for the Course. Informal learning is a powerful yet under-appreciated asset. Many organizations can benefit from providing a forum for discussions and the exchange of ideas. Why don't you set the ball rolling, and break the ice so to speak, by creating a topic of conversation?

To work with the Discuss feature, begin by clicking the **ADD NEW TOPIC** button, as shown in the following illustration.



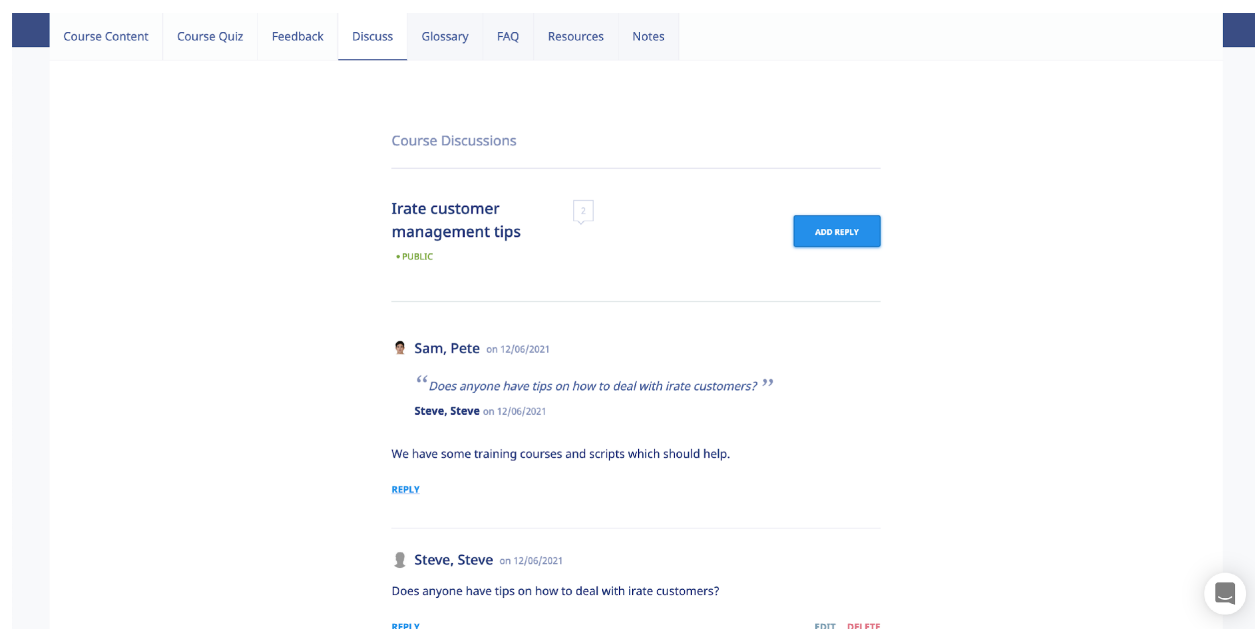
The **Add New Topic** screen, illustrated below, is displayed.

1. Enter the new Topic's name in the Name field.
2. Enter a Comment pertaining to the new Topic in the Comment field.
3. Select a Type for the new Topic from the Type drop down. Available options are **Public** (access to students and the instructor(s) or **Private – goes to your instructor only**.
4. Click . This will get your users started on sharing ideas, strategies, and best practices. This is how to get your informal learning system started. The system confirms that the new Topic has been added to the Whiteboard, as shown in the following illustration.



As shown in the following illustration, the Topic is now on the Topic list and you can continue to add additional Topics, as necessary, by re-using the **add new topic** link.

Additionally, clicking on the Topic Name displays the Topic Details screen, as shown in the following illustration.



Now your users can select the **add your comment** link to add their comment(s), and other Users and/or the Instructor can use the **reply** link to respond, expanding the dialog between those with access to the Topic.

eLeaP™ wants to help you succeed. Use these powerful tools to enhance the learning experience of your users or trainees.

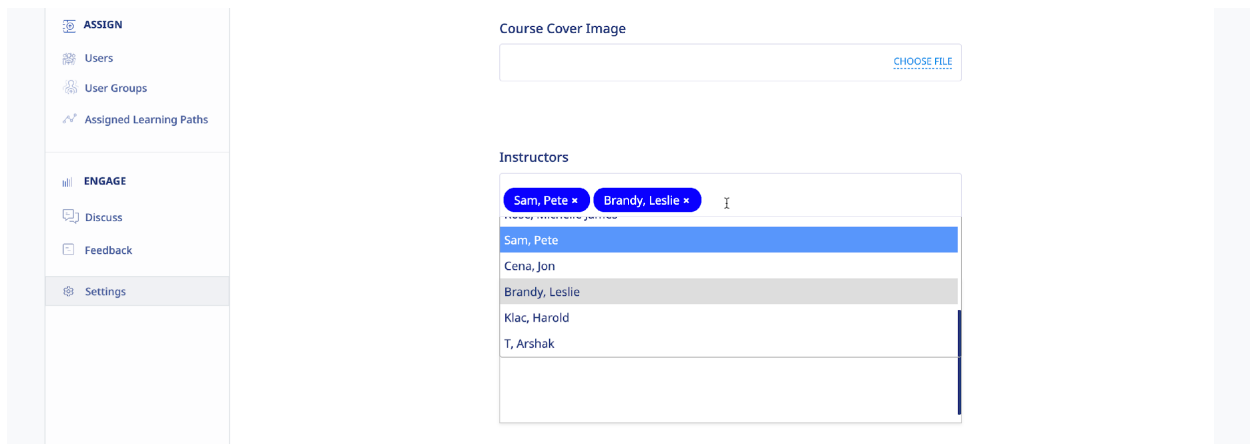
Instructors

Selecting the **INSTRUCTORS** line in the Course Definitions screen displays any additional **Instructors** that can be added to the current course.

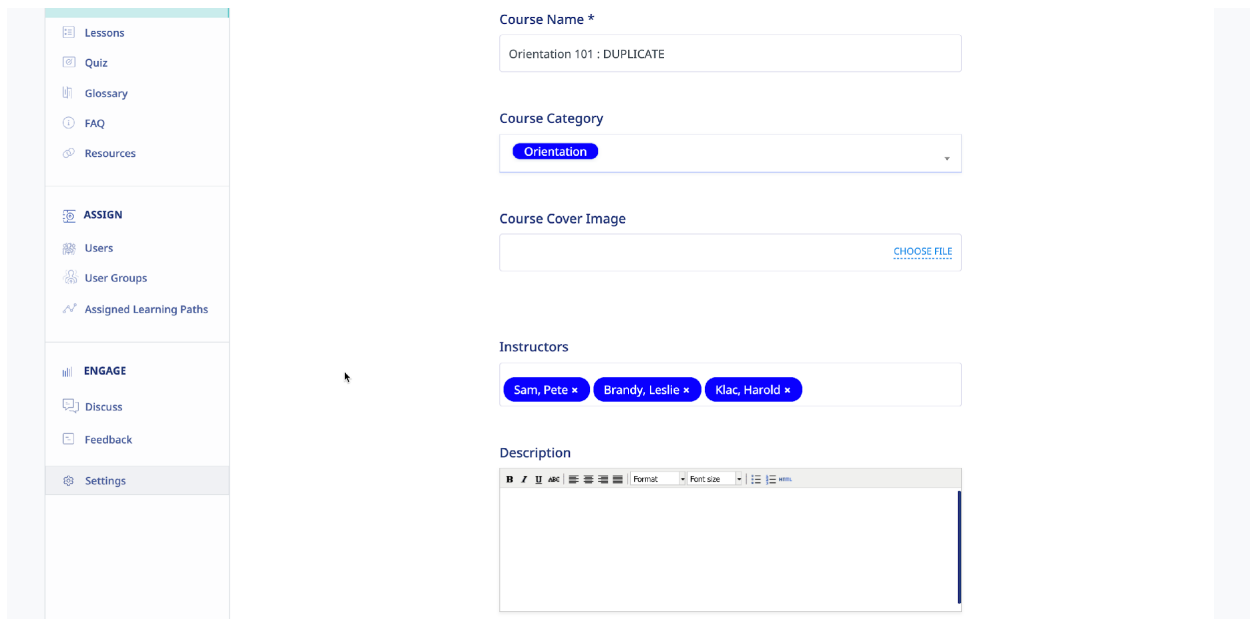
The screenshot displays the eLeaP interface for course management. On the left is a sidebar with a menu containing the following items: CONTENT (with a sub-item 'Course Definition'), LESSONS, QUIZ, GLOSSARY, FAQ, RESOURCES, ASSIGN (with sub-items 'Users', 'User Groups', and 'Assigned Learning Paths'), ENGAGE (with sub-items 'Discuss' and 'Feedback'), and SETTINGS. The main content area is titled 'Course Definition' and includes the following fields: 'Course Name *' with the value 'Orientation 101 : DUPLICATE', 'Course Category' with a dropdown menu showing 'Orientation', and 'Course Cover Image' with a 'CHOOSE FILE' button. Below these is the 'Instructors' section, which shows a list of names: 'Sam, Pete' (with a close icon), 'Reviewer, Capterra', 'Rose, Michelle James', 'Sam, Pete' (highlighted with a blue bar and a red arrow), 'Cena, Jon', and 'Brandy, Leslie' (with a red arrow). A vertical scrollbar is visible on the right side of the instructors list.

Adding an Instructor

To add additional instructors to the current course, click anywhere in the Instructors box and select the specific name you wish to add to the course. You can also remove any existing instructors by clicking the [x] next to their names.



The new Instructor will be added to the **Instructors** list on the **Instructors** screen, as shown in the following illustration.






Deleting an Instructor

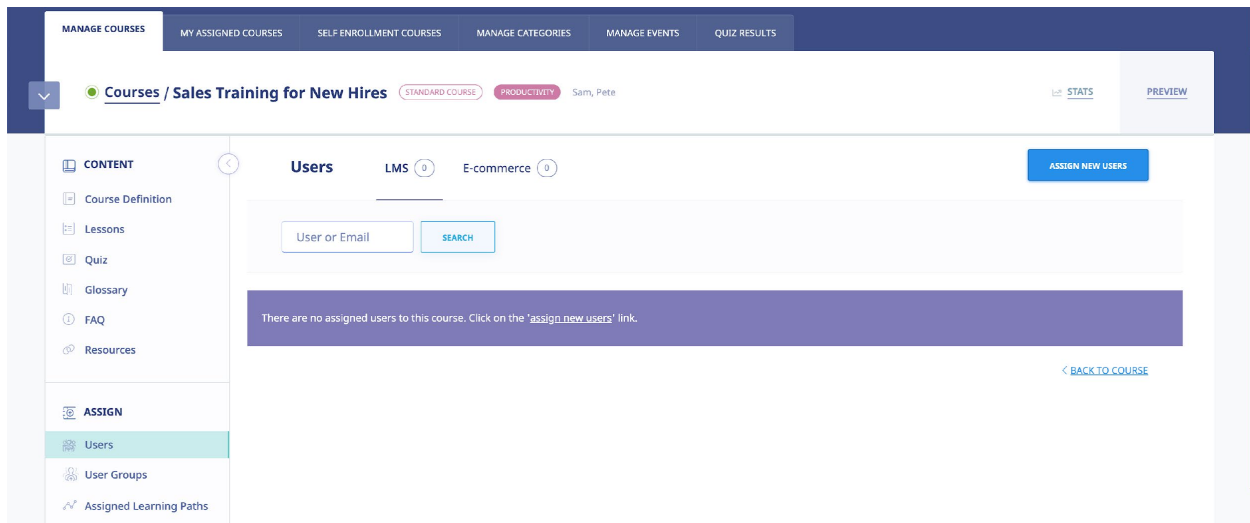
Clicking the [x] next to an existing course **Instructor's** name will remove that instructor from the current course. Please note this does not delete the instructors' account; merely removing from co-managing the current course




If you are satisfied with your change, click the  to lock in your changes.

Assigned Users

Selecting the  **Users** submenu item from the  **ASSIGN** section in the **Manage Course** screen displays the **Assigned Users** screen, illustrated below. This screen is used to assign Users within the system to a Course. To begin the process, click the  button.



The **Assign Users** screen, illustrated below, is displayed. You can filter the Users displayed here by entering a Name in the **Name** field, selecting a User Type from the **User Type** list, and/or selecting a User Group from the **User Group** list, and then clicking .

T3 Orientation Course 101 96 TOTAL USERS

STATS PREVIEW

CONTENT

- Course Definition
- Lessons
- Quiz
- Glossary
- FAQ
- Resources
- ASSIGN
 - Users**
 - User Groups
 - Assigned Learning Paths
- ENGAGE
 - Feedback

User or Email Select Level Select User Group Select Course FILTER

Show custom fields filters

<input type="checkbox"/>	NAME	LEVEL	EMAIL	INSERT DATE	ACTIVE
<input type="checkbox"/>	Acker, Bill	Instructor	don+ba@telaniamail.com	06/04/2021	✓
<input type="checkbox"/>	Alpha, Bravo	Trainee	alpha@telaniaskype3telaniamail.onmicrosoft.com	01/29/2020	✓
<input type="checkbox"/>	Apla, Kilo	Trainee	don+alpha@telaniamail.com	02/22/2022	✓
<input type="checkbox"/>	Baker, Bill	Manager	newusry5@telaniamail.com	12/17/2018	✓
<input type="checkbox"/>	Beetle, Ant	Trainee	antonia.clocodeica@gmail.com	01/22/2019	✓

To assign Users to the Course, select their check box on the **Users** list, and then click **ADD SELECTED**. As shown in the following illustration, the system confirms that the Users have been added. You can click a User's **Email** link to send them Notification Emails pertaining to the Course at any time. Additionally, you can once again select the **assign new users** link to add additional Users or select Users on the **Users** list and click **unassign selected users** to remove them from the Course.

Courses / Sales Training for New Hires STANDARD COURSE PRODUCTIVITY 3 USERS Sam, Pete

STATS PREVIEW

CONTENT

- Course Definition
- Lessons
- Quiz
- Glossary
- FAQ
- Resources
- ASSIGN
 - Users**
 - User Groups
 - Assigned Learning Paths
- ENGAGE
 - Settings

Users LMS 3 E-commerce 0

ASSIGN NEW USERS

User or Email SEARCH

<input type="checkbox"/>	NAME / EMAIL	PROGRESS	QUIZ	COMPLETED DATE	↑ INSERT DATE
<input type="checkbox"/>	user9, Brandon telania+user4@gmail.com		N/A	-	12/06/2021
<input checked="" type="checkbox"/>	user8, Susan telania+user3@gmail.com		N/A	-	12/06/2021
<input type="checkbox"/>	user7, Tracy telania+user2@gmail.com		N/A	-	12/06/2021

UNASSIGN SELECTED USERS 1 RESET SELECTION

The User who has been assigned to the Course will receive a Notification Email similar to the following example.

Paul,

You have been assigned to the following Course: **Users**

Please go to your account at <https://eleapdemo.eleapdev.com/> to access this Course.



Please note: This e-mail was sent from a notification-only address that cannot accept incoming e-mail. Do not reply to this message.

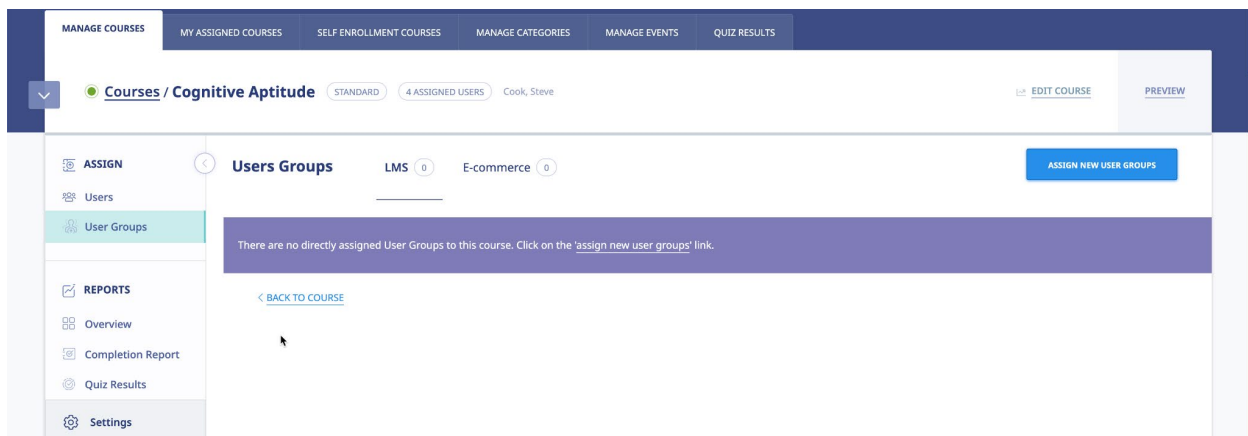
Instead send your reply to help@eleapsoftware.com.

If you have received this email in error, please forward it immediately to support@eleapsoftware.com or contact eLeaP at www.eleapsoftware.com.

Sent: 11.12.2013 15:34

Assigned User Groups

Selecting the  **User Groups** submenu item from the  **ASSIGN** section in the **Manage Course** screen displays the **Assigned User Groups** screen, illustrated below. As shown in the following illustration, the **Assign User Groups** screen is displayed. To begin the process of assigning User Groups to a Course, click the **ASSIGN NEW USER GROUPS** button.



As shown in the following illustration, the **Assign User Groups** screen is displayed. You can filter what is displayed on the **User Groups** list by entering a User Group Name in the **Name** field and clicking



Home / Courses / Sales Training for New Hires / Assigned User Groups / Assign User Groups

Sales Training for New Hires 11 TOTAL USER GROUPS [STATS](#) [PREVIEW](#)

CONTENT

- Course Definition
- Lessons
- Quiz
- Glossary
- FAQ
- Resources
- ASSIGN**
 - Users
 - User Groups**
 - Assigned Learning Paths
- ENGAGE
- Settings

Name

NO.	<input type="checkbox"/>	NAME	DESCRIPTION	NO. OF MEMBERS	DATE CREATED	ACTIVE
1.	<input checked="" type="checkbox"/>	Cincinnati Team		5	03/13/2017	
2.	<input type="checkbox"/>	EOS		2	05/13/2021	
3.	<input type="checkbox"/>	John hon		0	04/23/2021	
4.	<input checked="" type="checkbox"/>	Louisville Team		3	03/13/2017	
5.	<input type="checkbox"/>	Observation Team		14	06/27/2017	

Select the check box for any User Group(s) that you want to assign to the Course and then click . As shown in the following illustration, the system confirms that the User Group(s) have been assigned to the Course, with the Group's **Name**, **No. of Members**, **Overall Progress**, **Quiz Completion** and **Insert Date** details displayed. You can now click the **assign new User Groups** link to assign additional User Groups or select User Group check boxes and click the **delete selected User Groups** link to remove those User Groups from the **User Groups** list assigned to the Course.

Home / Courses / Sales Training for New Hires / Assigned User Groups

MANAGE COURSES MY ASSIGNED COURSES SELF-ENROLLMENT COURSES MANAGE CATEGORIES MANAGE EVENTS QUIZ RESULTS

Courses / Sales Training for New Hires STANDARD COURSE PRODUCTIVITY 8 USERS Sam, Pete [EDIT COURSE](#) [PREVIEW](#)

ASSIGN

- Users
- User Groups**
- ENGAGE
- REPORTS
 - Overview
 - Completion Report
 - Quiz Results

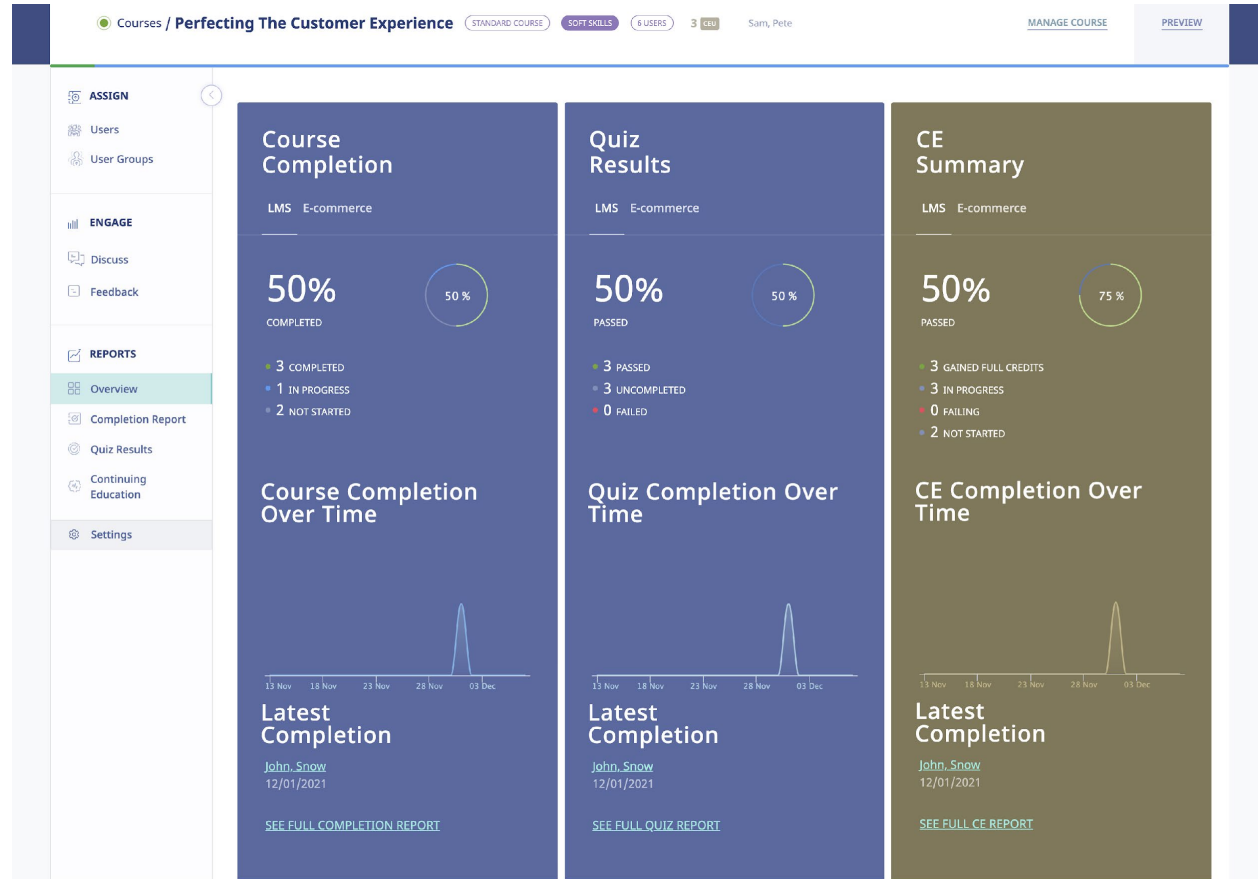
Users Groups LMS 2 E-commerce 0

NO.	<input type="checkbox"/>	NAME	NO. OF MEMBERS	OVERALL PROGRESS	QUIZ COMPLETION	INSERT DATE
1.	<input type="checkbox"/>	Cincinnati Team	5	Not started: 5 [100%] In Progress: 0 [0%] Completed: 0 [0%]	Uncompleted: 5 [100%] Passed: 0 [0%] Failed: 0 [0%]	12/06/2021
2.	<input type="checkbox"/>	Louisville Team	3	Not started: 3 [100%] In Progress: 0 [0%] Completed: 0 [0%]	Uncompleted: 3 [100%] Passed: 0 [0%] Failed: 0 [0%]	12/06/2021

Course Report

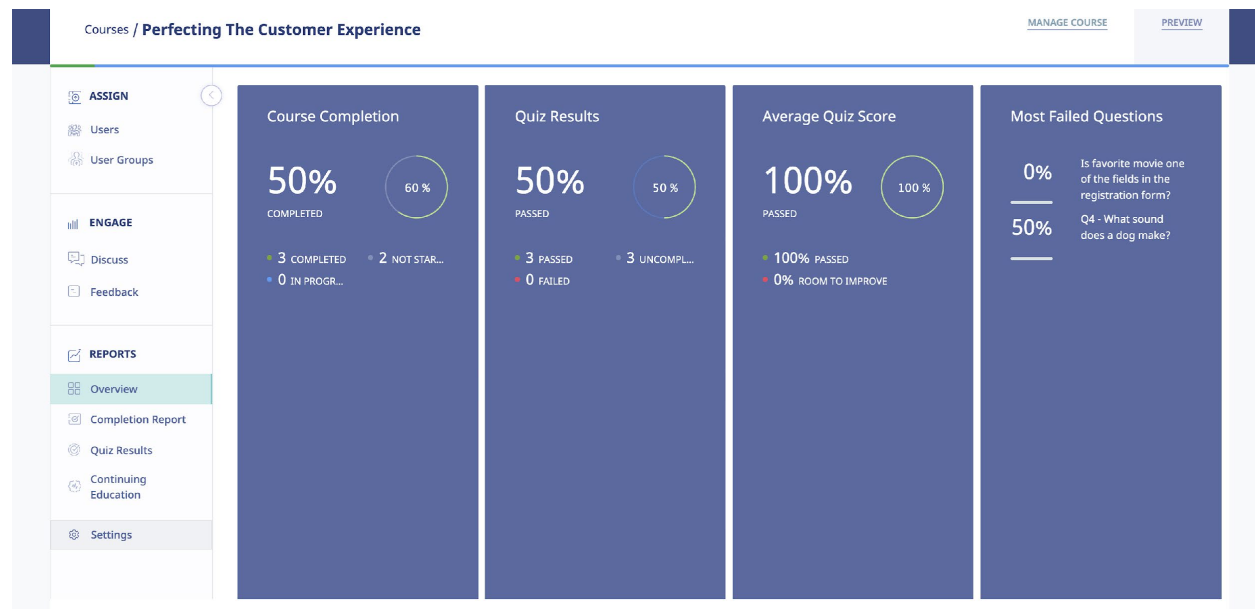
Overview

Clicking on the name of a course in the courses listing will take you to the course report overview page.



The course report overview will display Course Completion, Quiz Results, CE Summary (if activated), Completion over time as well as Latest Completions.

If you don't have the CE Module activated your overview screen will look like:

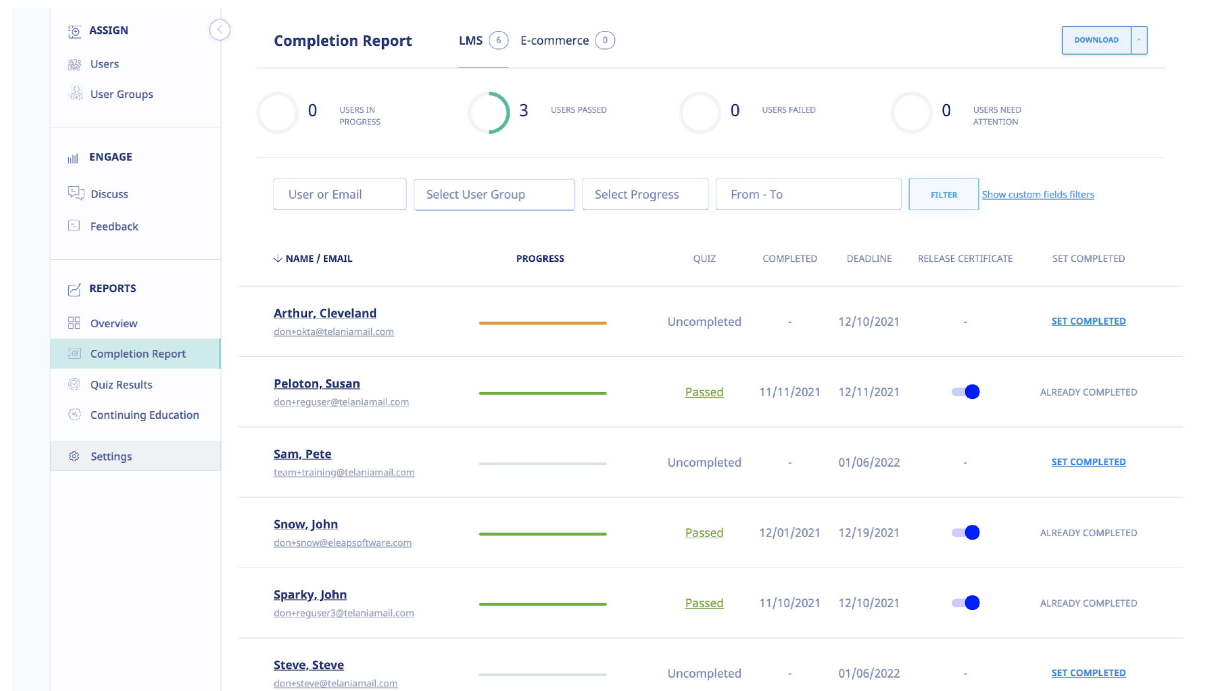


The overview reports are designed to give you a quick view of the activity occurring within the course. You can click on other sections of the Reports area to see additional information.

Completion Report

Click the [Completion Report](#) link in the **REPORTS** section of the sub menu. This opens the [Completion Report] section of the Stats area.

In the Completion Report you will be able to see:



This screen displays all Stats & Completion Reports on a Completion Reports list, with the **Name, Email, Progress, Quiz, Quiz Completed, Release Certificate, Deadline, Active/Inactive** status and **Set Completed** status details shown for each report on the list. You can filter the results displayed on this screen by making a selection from the **User** list and/or the **User Group** list, entering a date range within the **From** and **To** fields (or using the **Calendar** icon to select those dates) and clicking [FILTER](#).

The Completion Report displays several Progress statuses including:

- **QUIZ NOT COMPLETED** means the user has not submitted their quiz for auto or manual grading.
- **E-SIGNATURE REQUIRED** means the user has not submitted an e-Signature to signify completion.
- **COMPLETED** means the user has met all requirements for course completion.
- **FEEDBACK REQUIRED** means the user has not submitted a required feedback form.
- **NOT STARTED** means the user has not started the course.
- **IN PROGRESS** means the user is in progress (note progress percentage).

Quiz Results

Click the [Quiz Results](#) link in the **REPORTS** section of the sub-menu. This opens the [Quiz Results Report] section of the Stats area.

In the Completion Report, you will be able to see:

Co... / Review Testing: ARA-RT... STANDARD COURSE SOFT SKILLS 2 USERS 1 CRED Klac, Harold EDIT COURSE PREVIEW

Quiz Results 2 QUESTIONS LMS 2 E-commerce 0 QUIZ RESULTS SUMMARY EXPORT TO EXCEL

2 USERS PASSED 0 USERS IN PROGRESS 0 USERS FAILED

User or Email Select User Group From - To Quiz Status FILTER

Show custom fields filters

NAME	POINTS EARNED	# OF RETRIES	LATEST QUIZ TAKEN ON	PASSED
Klac, Harold	6/7	0 RETRIES	04/03/2023 09:39 EDT	PASSED
Lazarus, Peter	7/7	0 RETRIES	04/02/2023 16:29 EDT	PASSED

User name, Points Earned, Number of Retries, Latest Quiz Completion Date as well as Pass/Fail status for the quiz. You click on the user's name to get more details on their quiz results.

You can filter this report by User or email, User Group, From – To date range, and Pass or fail status as well as using custom fields. To download this report into Excel, click the Export to Excel link. You can click the Quiz Results Summary to get details on how your users scored across your entire quiz question set.

To reset the quiz status, simply select the user(s) and click **[Delete Selected Results]**

Discuss Feedback

User or Email Select User Group From - To Quiz Status FILTER

Show custom fields filters

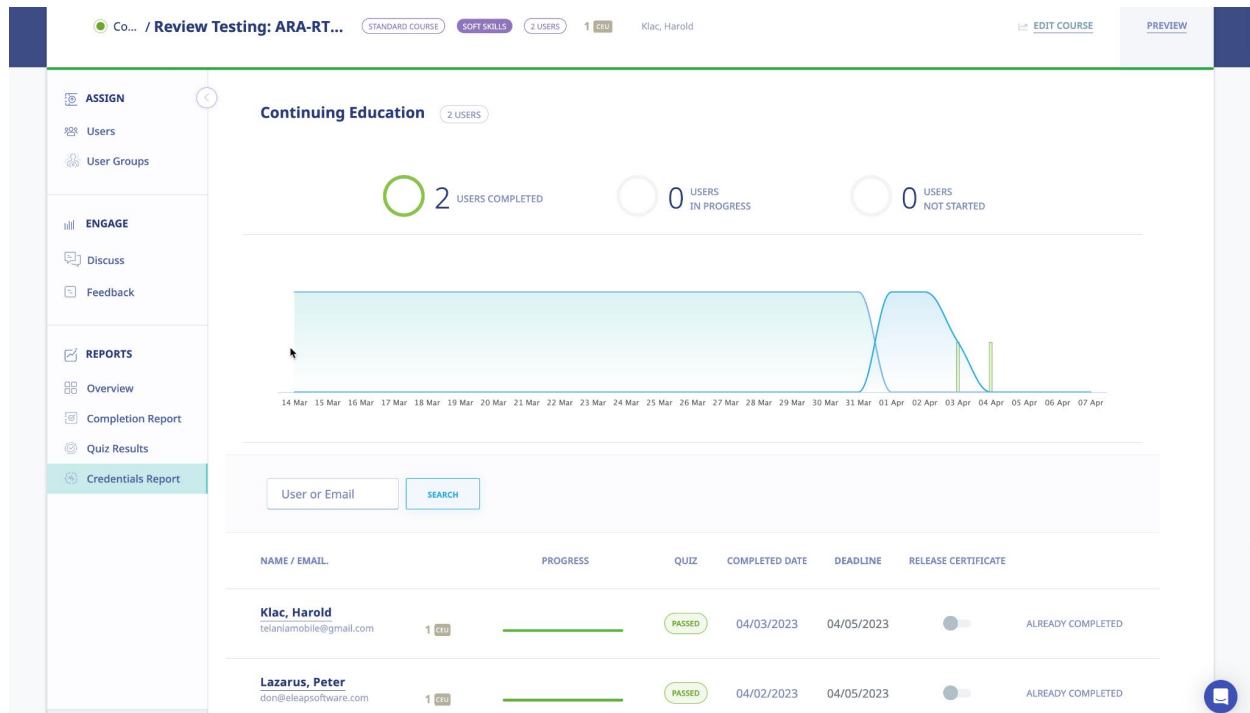
NAME	POINTS EARNED	# OF RETRIES	LATEST QUIZ TAKEN ON	PASSED
Klac, Harold	6/7	0 RETRIES	04/03/2023 09:39 EDT	PASSED
Lazarus, Peter	7/7	0 RETRIES	04/02/2023 16:29 EDT	PASSED

DELETE SELECTED RESULTS RESET SELECTION

This will reset the quiz status back to [Not started] and your user can attempt the quiz session (without restarting the entire course).

Continuing Education Results

Click the **Credentials Report** link in the **REPORTS** section of the sub menu. This opens the [Credentials Report] section of the Stats area.



The Continuing Education course completion results section enables you to see how your users are progressing through their CE courses.

E-Signature log

If at least, one E-Signature has been submitted, eLeaP will display the [E-Signature log] link This link is located in the [DOWNLOAD](#) dropdown section. Click [Download] and then select [E-Signature Log](#) from the dropdown.

NAME / EMAIL	PROGRESS	QUIZ	COMPLETED	DEADLINE	RELEASE CERTIFICATE	SET COMPLETED
als.zoka soss@soss.com	<div></div>	Failed	11/16/2021	11/30/2021	-	ALREADY COMPLETED
Anisti, Cristos don+chrostos@telaniaemail.com	<div></div>	Uncompleted	-	11/30/2021	-	SET COMPLETED
Arthur, Cleveland don+okta@telaniaemail.com	<div></div>	Uncompleted	-	12/07/2021	-	SET COMPLETED
James, Brother brother@james.com	<div></div>	Passed	11/25/2021	12/08/2021	-	ALREADY COMPLETED

The E-Signature log will display a dedicated list of the submitted E-Signatures including time stamps of submissions as well as IP addresses of the submitted E-Signatures.


NO.	NAME	EMAIL	SIGNED ON	OLD STATUS	NEW STATUS	SIGNER IP
1.	James Brother	brother@james.com	November 25, 2021, 9:34 am EST	Not completed	Completed	96.28.40.136
2.	als zoka	soss@soss.com	November 16, 2021, 4:07 pm EST	Not completed	Completed	96.28.40.136
3.	Snow John	don+snow@eleapsoftware.com	November 16, 2021, 3:58 pm EST	Not completed	Completed	96.28.40.136

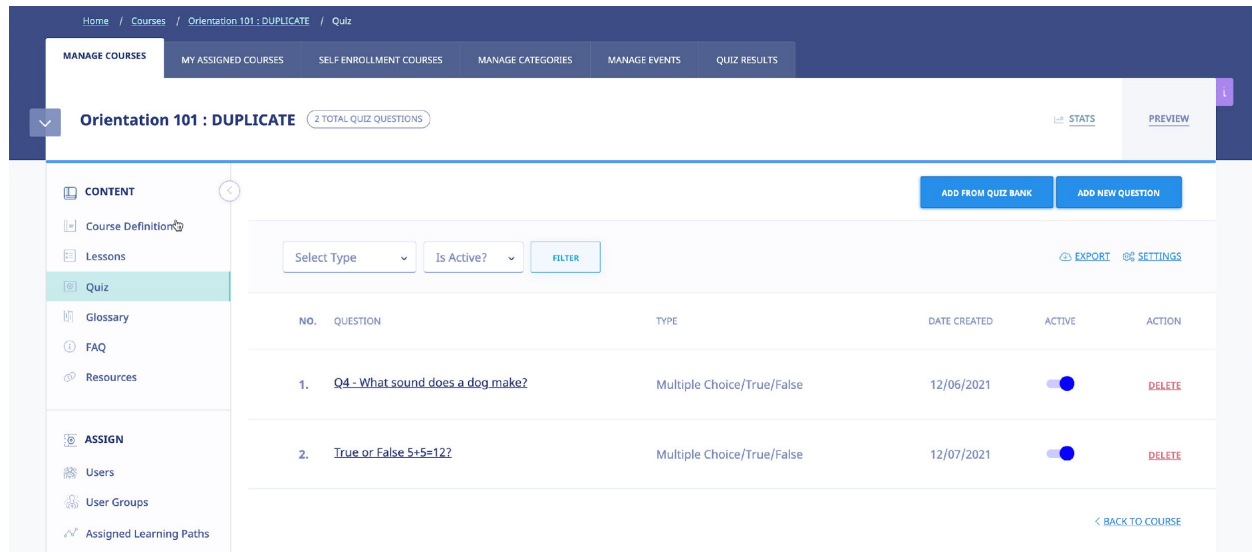
You can download this log into PDF or Excel,

Quiz

Selecting the **Quiz** submenu item from the **CONTENT** area of the course management screen displays the **Quiz** screen for that Course, as shown in the following illustration. eLeaP™ encourages you to create pre- and post-course assessments. Measuring trainee performance enables you to

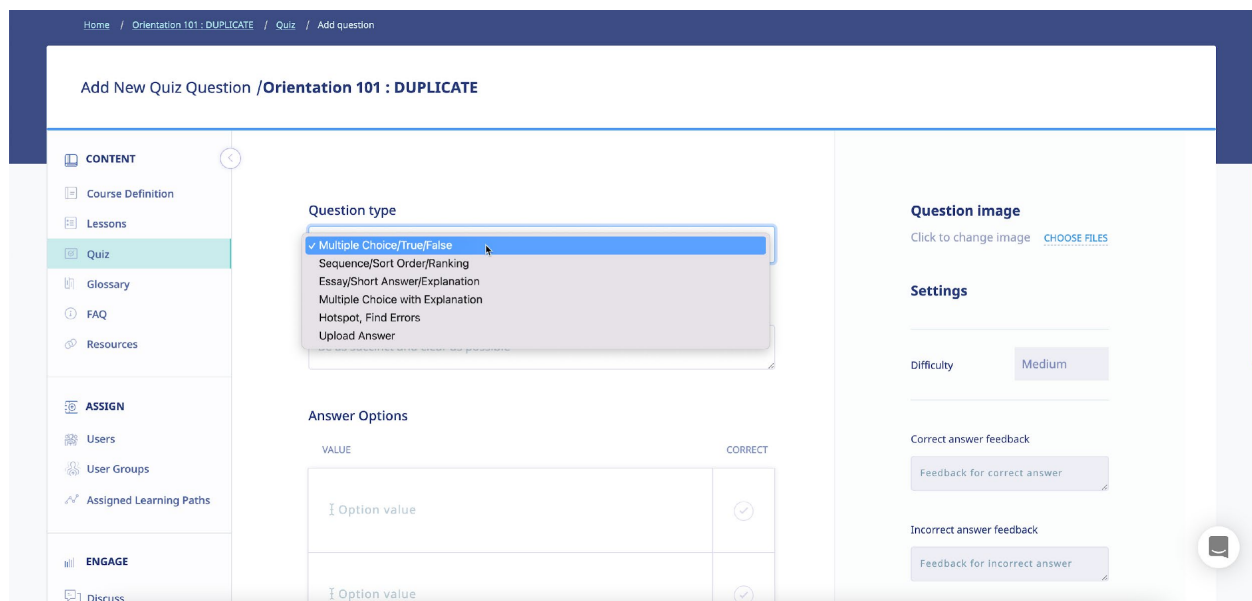
evaluate the full impact of your e-learning training program.

You can filter the results displayed on the **Quizzes** list by making a selection from the **Type** list, making a selection from the **User Groups** list and/or entering dates within the **From** and **To** fields (or using the **Calendar** icon to select those dates), and then clicking .



NO.	QUESTION	TYPE	DATE CREATED	ACTIVE	ACTION
1.	Q4 - What sound does a dog make?	Multiple Choice/True/False	12/06/2021	<input checked="" type="checkbox"/>	DELETE
2.	True or False 5+5=12?	Multiple Choice/True/False	12/07/2021	<input checked="" type="checkbox"/>	DELETE

As shown in the following illustration, the following Quiz Types are available: **Multiple Choice/True False, Sequence/Sort/Order/Ranking, Essay/Short Answer/Explanation, Multiple Choice with Explanation and Hotspot, Find Errors and Upload Answer.**



VALUE	CORRECT
Option value	<input checked="" type="checkbox"/>
Option value	<input checked="" type="checkbox"/>




You can begin to add questions to it by selecting the **ADD NEW QUESTION** button, as shown in the following illustration.

The **Add new question** screen is displayed, as shown in the following illustration. Use the steps below to successfully add a new question to a Quiz.

1. Select a Question Type from the **Question type** list.
2. Enter the question in the **Question** box.
3. If you want to upload multiple quiz questions, use the **BULK IMPORT** option. Please make sure to download and properly fill out the question template:

	A	B	C	D	E	F	G
	Question	Question Type	Answer Options	Correct Answer	Difficulty	Feedback Correct	Feedback Incorrect
1	What sound does a dog make?	Multiple Choice/True or False	Woof/Moo/Oink/Woof	Woof	Easy		
2	What sound does a pig make?	Multiple Choice/True or False	Meow/Moo/Oink/Woof	Oink	Medium		
3	What sound does a cat make?	Sequence/Order/Ranking	Meow/Moo/Oink/Woof	Meow			
4	Put these numbers in the right order	Essay/Short Answer	1/2/3/4/5				
5	What is inflation?	Essay/Short Answer					
6							
7							
8							
9							

- Enter question

- Select question type using the dropdown options
 - If Multiple Choice or Sequence type enter the Answer Options. Note that / is the delimiter
 - If Multiple Choice, enter the Correct Answer (this should be the same as entered in the Answer Options cell).
 -
4. Upload an image for each option, if desired, by clicking the  icon.
 5. Select the degree of difficulty for the Question from the **Difficulty** list in the Settings area. Available options are **Easy**, **Medium** or **Hard**.
 6. Click the [CHOOSE FILES](#) option to upload an image associated with the Question. eLeaP provides its users with the opportunity to use images within Questions and Answers. For example, if the Question was “Which of these two images represents the small intestines,” they could upload an image of the large intestines as Option A and an image of the small intestines as Option B. Enter as many options as necessary with the **Options** boxes. In our example, only two would be necessary; one for if the answer is **True**, and another for if the answer is **False**.
 7. Select the **Correct** checkbox  for the option that represents the correct answer to the question.
 8. Enter any Feedback desired when an answer is correct within the **Correct answer feedback** and **Incorrect answer** boxes in the Settings area.
 9. Click  to create the question.

The system confirms that the question has been added, as shown in the following illustration, and you can add additional questions, if desired.

The question has been saved

Question type

Multiple Choice/True/False

Question

It a lot in Britain

Answer Options

VALUE	CORRECT
rains	<input checked="" type="checkbox"/>
rain	<input type="checkbox"/>

Question image

Click to change image [CHOOSE FILES](#)

Settings

Difficulty: Medium

Correct answer feedback

Feedback for correct answer

Incorrect answer feedback

Feedback for incorrect answer

Re-selecting the **QUIZ** tab shows that the Question has been added to the Quiz, as shown in the following illustration.

Orientation 101 : DUPLICATE 2 TOTAL QUIZ QUESTIONS STATS PREVIEW

CONTENT

- Course Definition
- Lessons
- Quiz**
- Glossary
- FAQ
- Resources

ASSIGN

- Users
- User Groups
- Assigned Learning Paths

[ADD FROM QUIZ BANK](#) [ADD NEW QUESTION](#)

Select Type: Is Active? [FILTER](#) [EXPORT](#) [SETTINGS](#)

NO.	QUESTION	TYPE	DATE CREATED	ACTIVE	ACTION
1.	Q4 - What sound does a dog make?	Multiple Choice/True/False	12/06/2021	<input checked="" type="checkbox"/>	DELETE
2.	True or False 5+5=12?	Multiple Choice/True/False	12/07/2021	<input checked="" type="checkbox"/>	DELETE

[BACK TO COURSE](#)

You can now click the **add new question** button to add an additional Question, click the **export** link to export the Quiz, and/or click the **settings** link to access the quiz settings area.

Clicking the **export** link will export a Quiz in .PDF format. As shown in the illustration below, you are given the option of **Opening** or **Saving** the Quiz.

Orientation 101 : DUPLICATE (2 TOTAL QUIZ QUESTIONS)

STATS PREVIEW

ADD FROM QUIZ BANK ADD NEW QUESTION

Select Type Is Active? FILTER

EXPORT SETTINGS

NO.	QUESTION	TYPE	DATE CREATED	ACTIVE	ACTION
1.	Q4 - What sound does a dog make?	Multiple Choice/True/False	12/06/2021	<input checked="" type="checkbox"/>	DELETE
2.	True or False 5+5=12?	Multiple Choice/True/False	12/07/2021	<input checked="" type="checkbox"/>	DELETE

BACK TO COURSE

Orientation_101_...pdf

Selecting the **Open** option will open the Quiz in your .PDF Reader, as shown in the following illustration, where you can save it to a location on your computer using the Reader's **Save** option on the **File** menu.

Quiz: New Hire Orientation Course - Welcome

1. What is 9-3
A. 8
B. 6
C. 5
2. How about 30 x 3
A. 90
B. 80
C. 66
3. It a lot in Britain
A. rains
B. rain
C. is rain

Quiz Question Facts

eLeaP™ currently has six (6) question types or formats:

- Multiple Choice/True/False,
- Sequence/Sort Order/Ranking,
- Essay/Short Answer/Explanation,
- Multiple Choice with Explanation, and
- Hotspot, Find Errors
- Upload Answer

To create **Multiple Choice** or **True or False** quiz questions, select that Question option, enter your question, assign a Difficulty Level, and upload an Image if needed. Next you will proceed to add the

possible Answer options. You can add up to six (6) possible Answers. If you need to upload images as part of your answers, click the button next to the relevant question. You are almost done. Next, you need to pre-select the correct Answer so that the eLeaP system can automatically grade your Quiz. Click to submit your question!


Quiz Feedback: You can include feedback rules based on correct and incorrect answers. Simply input the relevant feedback options in the bottom boxes provided in eLeaP™.

Repeat this process as many times as needed to create other Multiple Choice or True or False questions.


Select **“Sequence, Sort Order or Ranking”** type questions if you want to create Quiz questions that test the ability of your Users to correctly Rank, Sequence or Sort different answer options. An example of such a question would be “arrange the planets in the correct order starting from the nearest to the sun”. You would then add the correct order sequence as Mercury, Venus, Earth, Mars, Jupiter ...”

The eLeaP™ system would automatically unscramble the answer sequence when your quiz is deployed so that your users would have to re-arrange them in the proper sequence.


Remember, click  to submit your question!

If you want to create quiz question that asks for a short answer or an essay, click the **Essay/Short Answer/Explanation** question option. All you have to do is type in your question and select the relevant Difficulty Level (if applicable) and then click  to submit your question!


You can ask a Multiple Choice question but also require your Users or Trainees to explain their answer choice. Select the **Multiple Choice with Explanation** option for this type of question. You need to enter your question in the **Question** box, select the **Difficulty level** that is needed, upload a picture or image if needed, and type in the answer options. You will then pre-select the correct response or answer and also check the **Explanation Needed** box for the relevant answer you have selected. If one of the possible answers is an image or picture, go ahead and upload the relevant picture from your computer. Click

 to submit your question!


The next question type in the eLeaP™ Quiz Creator system is the **Hotspot or Find the Error** Question Type. Do you have a map you need correctly identified or a schematic diagram you need to have correctly analyzed? Select the **[Hotspot, Find Errors]** Question Type, enter the question, select the **Difficulty level**, click the **upload image** link to find and upload the relevant image into the eLeaP™ system. Note: if this is a schematic diagram that you need to analyze, you would need to have pre-created it as such.

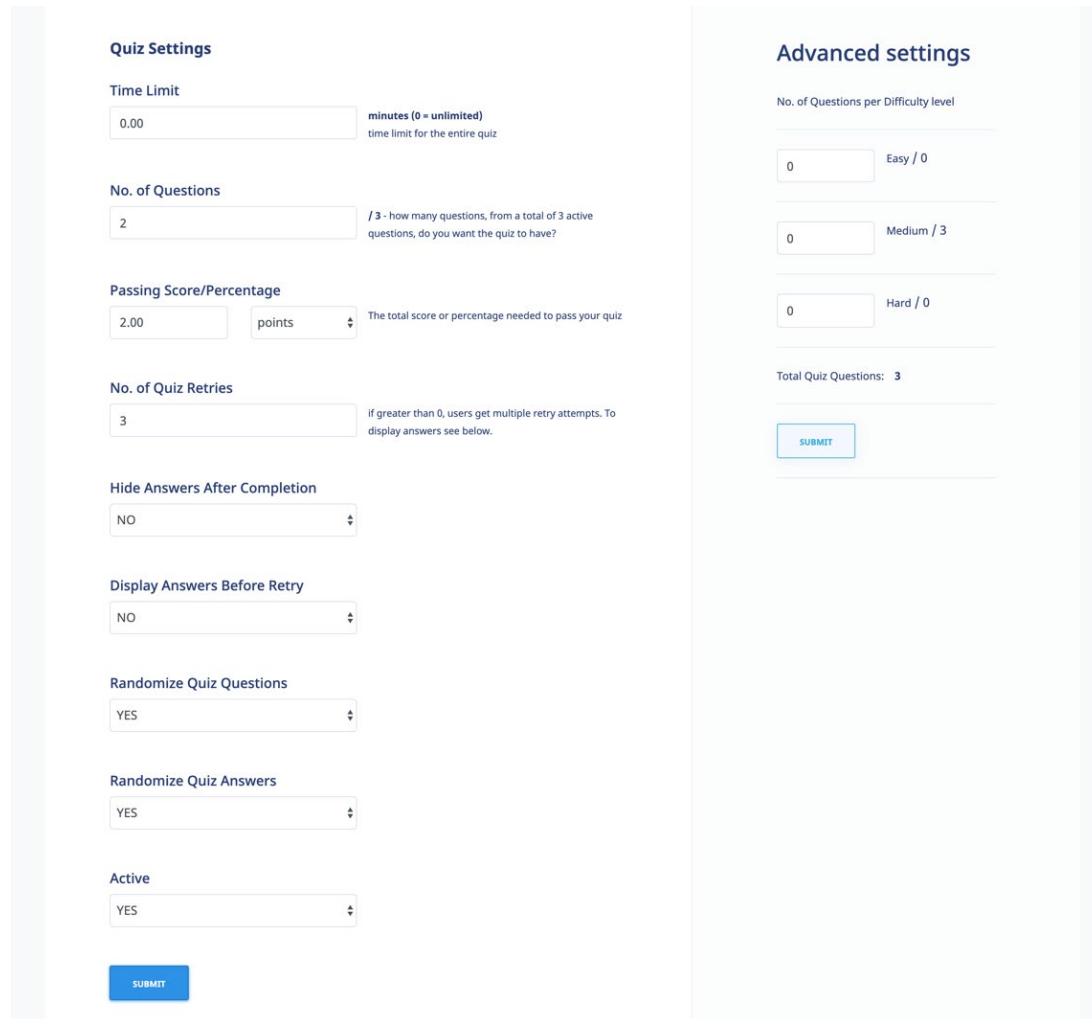
If you are satisfied with your question and you have uploaded the relevant image(s), it is time to click  to save your new quiz question.

The Upload Answer question type is designed to allow your trainees to send in ‘homework’ to be

reviewed and graded. To create the Upload Answer question type, add in the question and click  to save your question. Your trainees can then upload their answers during their quiz session.

Quiz Settings

Selecting the  link on the **Quiz** screen displays the **Settings** screen for the Quiz, as shown in the following illustration. Use the steps below to successfully navigate the **Settings** screen.



The image shows two side-by-side screenshots of the Quiz Settings interface. The left screenshot is titled 'Quiz Settings' and contains the following fields: 'Time Limit' (0.00 minutes, 0 = unlimited), 'No. of Questions' (2, / 3 - how many questions, from a total of 3 active questions, do you want the quiz to have?), 'Passing Score/Percentage' (2.00 points, The total score or percentage needed to pass your quiz), 'No. of Quiz Retries' (3, if greater than 0, users get multiple retry attempts. To display answers see below.), 'Hide Answers After Completion' (NO), 'Display Answers Before Retry' (NO), 'Randomize Quiz Questions' (YES), 'Randomize Quiz Answers' (YES), and 'Active' (YES). A 'SUBMIT' button is at the bottom. The right screenshot is titled 'Advanced settings' and contains the following fields: 'No. of Questions per Difficulty level' (Easy / 0, Medium / 3, Hard / 0), 'Total Quiz Questions: 3', and a 'SUBMIT' button.

1. Enter a Time Limit for the entire Quiz in the **Time Limit** field, in **Minutes**.
2. Enter the number of Questions that you want to have in the **No. of Questions** field.
3. Enter the Total Score or Percentage necessary to pass the Quiz in the **Passing Score/Percentage** field, selecting **points** or **percentage** as the basis for passing the Quiz.
4. Enter the number of retries available for students who don't pass the Quiz in the **No. of Quiz Retries** field. If greater than **0**, users get multiple retry attempts. To display answers, see below.

5. Select the **YES** option or the **NO** option to indicate whether or not to display answers before a retry from the **Display Answers before retry** list.
6. Select the **YES** option or the **NO** option to indicate whether you want to randomize the quiz questions or not from the **Randomize Quiz Questions** list.
7. Select the **YES** option or the **NO** option to indicate whether you want to randomize the quiz answers or not from the **Randomize Quiz Answers** list.
8. Select the **YES** option or the **NO** option to indicate whether or not the Quiz is **Active** or **Inactive** from the **Active** list.
9. Click **SUBMIT** to save the Quiz to the system. The system confirms that the Quiz Settings have been saved, as shown in the following illustration.

Orientation 101 : DUPLICATE

Quiz settings have been saved

Quiz Settings

Time Limit
0.00 minutes (0 = unlimited)
time limit for the entire quiz

No. of Questions
2 / 2 - how many questions, from a total of 2 active questions, do you want the quiz to have?

Passing Score/Percentage
2.00 points
The total score or percentage needed to pass your quiz

Advanced settings

No. of Questions per Difficulty level

0 Easy / 0

0 Medium / 2

0 Hard / 0

SUBMIT

10. Within the **Advanced Settings** portion of the screen, enter the number of Questions with a difficulty level of **Easy**, **Medium** or **Hard**, and then click **SUBMIT**.


Quiz Settings Explained

- a. **Time Limit:** Assign a time limit for Quiz completion. Just type in the number of minutes you want to assign for your quiz.
- b. **No. of Questions:** Do you want to use a 1/3 of the questions you have available in your Question Bank? Then type in the relevant number of questions (to be deployed) out of the **Total Quiz Questions** available to you. For example, if you had 30 questions in your Question Bank but only wanted to use 25 of them, then you will type in 25 in the [No. of Questions] box.
- c. **Passing Score:** What is the minimum score a user would have to achieve to pass your quiz assessment? From the example above if you need your users to correctly answer 20 questions out of 25 total questions to pass your quiz then type in 20 questions in the [Passing Score] field.
- d. **Passing Percentage:** You can alternatively select the percentage passing value, and eLeaP will

automatically calculate it based on the number of questions used.

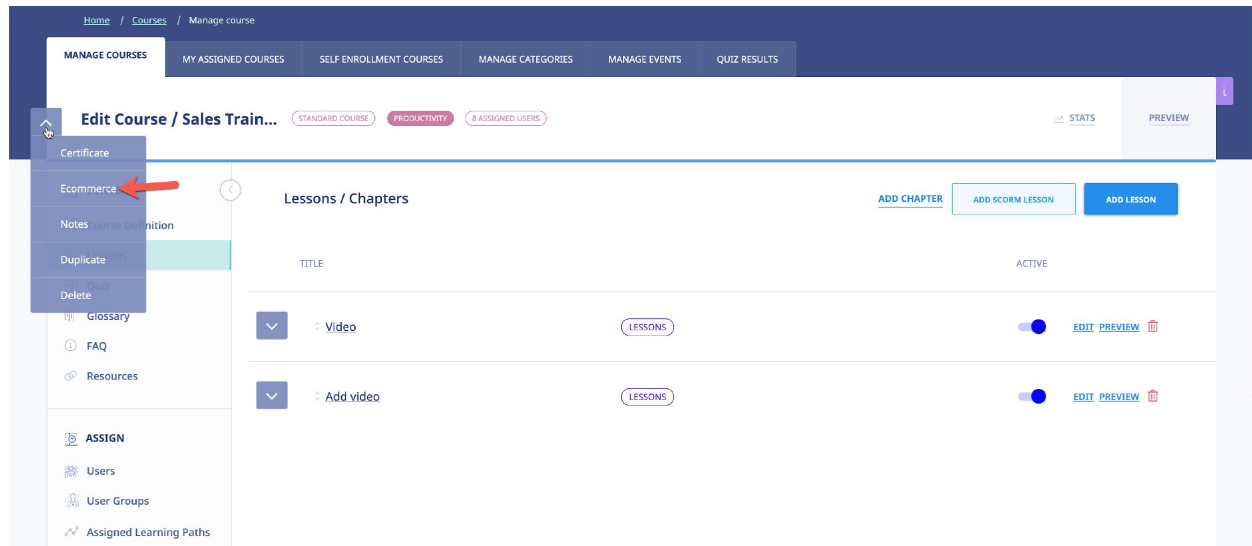
- e. **Number of Quiz Retries:** Give your users more than one quiz attempt. Use the Quiz Retries option to set the number of additional retry opportunities.
- f. **Display Answers before Retry:** Because of the retry options above, you may choose to block answer feedback during the retry effort. This way, users will only see the correct answers when they accept their final quiz scores.
- g. **Randomize Quiz Questions:** Use this option to let eLeaP automatically randomize how it serves up your quiz. This works best if you use fewer questions than your total number of created quiz questions.
- h. **Randomize Quiz Answers:** In addition to randomizing the order of the quiz questions, you can also randomize the order in which your Quiz answers are displayed. For example, the correct answer might not be option B, it could be moved to option C.
- i. **Ready to launch your quiz?** Choose option [YES] in the [Active] field and then click [Submit] to launch your Quiz.

Quiz Advanced Settings

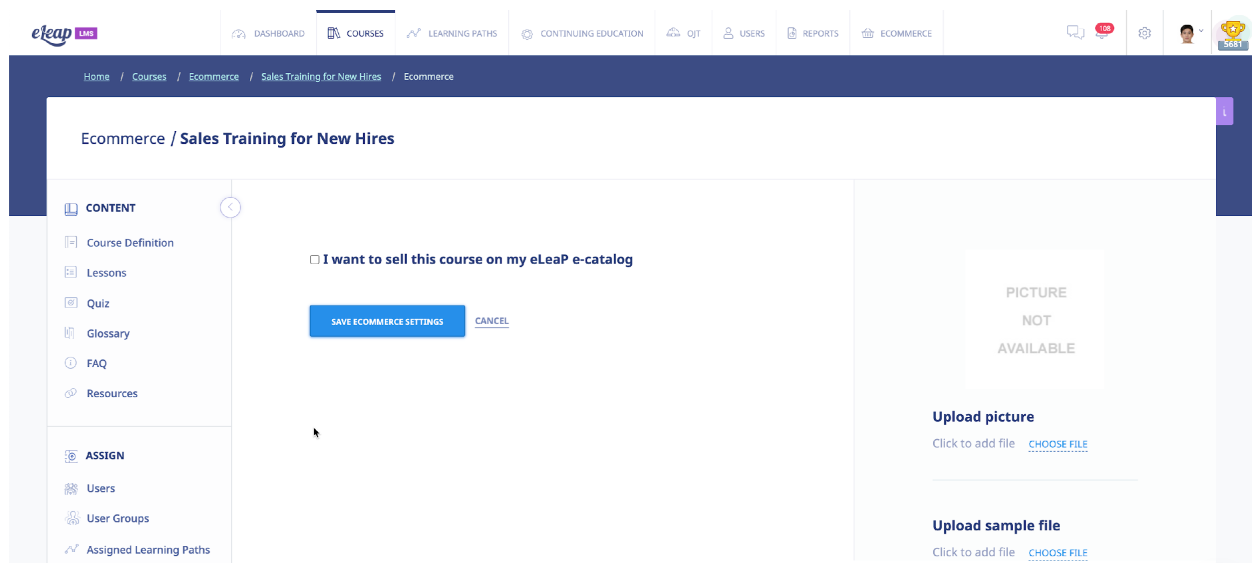
eLeaP™ makes it easy to automatically set and assign different difficulty levels of quiz questions to your users. Let's say out of a total of 30 questions in your Question Bank, you want the eLeaP™ system to designate 10 questions as Easy, 10 questions as Medium and 10 questions as Hard or Difficult. Click . The eLeaP™ system would then automatically assign these questions to your users.

Ecommerce

Selecting the **Ecommerce** section from the Course Definition dropdown displays the Ecommerce screen, illustrated below.



Select the **I want to sell this course on my eLeaP e-catalog** check box if you want to sell this Course on your eLeaP e-catalog.



The screen expands, as shown in the following illustration, so that you can configure the necessary settings to accomplish this task. Use the steps below to successfully configure these settings.

Ecommerce / Sales Training for New Hires

CONTENT

Course Definition

Lessons

Quiz

Glossary

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ASSIGN

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User Groups

Assigned Learning Paths

ENGAGE

Settings

☒ I want to sell this course on my eLeaP e-catalog

Category Tags

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

Tags separated by comma

Description

Pricing Model

Default Price per license

\$ 0.00

Pricing Type

☒ Standard pricing
Simple pricing. No discount for multiple licenses.

☐ Multi license pricing
Tiered or volume discounts for multiple licenses.

Eligible for Volume discount ☐

Extend Your Reach

Yes, I want this course to be available for purchase on the eLeaP e-learning catalog <http://www.eleapcourses.com> (Recommended) ☒

Yes, I am ready to sell this course ☐

SAVE ECOMMERCE SETTINGS

CANCEL

PICTURE NOT AVAILABLE

Upload picture

Click to add file [CHOOSE FILE](#)

Upload sample file

Click to add file [CHOOSE FILE](#)

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


- Use category 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 **Description** section of the screen:


- Enter in the product description that would motivate buyers to purchase your course. If you

want to add video, you can embed video from YouTube or Vimeo or other sources. Let us know and we can help you.


Within the **Pricing Model** portion of the screen:

- Use Standard Pricing if you have a simple single price per license regardless of how many are purchased. Enter the price for a single user to take a Course; for example, \$10.
- Use the [Multi license pricing] if you wish to create more complex pricing.
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.
- You can use Volume pricing or turn off Volume pricing and use Tiered pricing for the **Multi-license pricing** calculation.
- 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.
- 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 **Upload picture** portion of the screen:


- Click the [CHOOSE FILES](#) link. While eLeaP does not require a course image for posting eCommerce courses, an image for display and marketing purposes is incredible. Images can be in JPG, GIF or PNG format. After clicking [CHOOSE FILES](#), the screen expands to display your files. Simply select an image file and click  to upload your image file.

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

- Click the [CHOOSE FILES](#) link. eLeaP requires a course sample for display and marketing purposes. Samples can be in PDF format. The screen expands to display your files. Simply select a file and click  to upload your sample file.

Within the **Extend Your Reach** section of the screen:

- Toggle the **ON** button to make your approved course available for purchase on the main eLeaP learning catalog located at <http://www.eleapcourses.com> (**Recommended**)
- Toggle the **ON** button to submit your eCommerce course for activation. Toggle **ON** for **Yes, I am ready to sell this course.**

- Click  to save your changes to the system.

Certificate Template

To create and deploy completion certificates, click **Certificate** dropdown from the Course Controls dropdown. The **Certificate Template** screen, illustrated below, is displayed. Use the steps below to create a Certificate Template.


The screenshot shows the 'Certificate Template' screen for 'Sales Training for New Hires'. The top navigation bar includes 'MANAGE COURSES', 'MY ASSIGNED COURSES', 'SELF ENROLLMENT COURSES', 'MANAGE CATEGORIES', 'MANAGE EVENTS', and 'QUIZ RESULTS'. The main header shows 'Certificate Template / Sales Training for New Hires' with a 'STANDARD' badge, 'STATS', and 'PREVIEW' links. The left sidebar has three sections: 'CONTENT' (Course Definition, Lessons, Quiz, Glossary, FAQ, Resources), 'ASSIGN' (Users, User Groups, Assigned Learning Paths), and 'ENGAGE' (Settings). The main content area has a header with 'A4 Landscape', 'Background', 'Trainee', 'Instructor', 'Course', 'Other', and 'Preview' tabs. Below this is a large empty box for the certificate design. At the bottom, there are fields for 'Release Certificate' (set to 'Manually'), a checkbox for 'Is the certificate ready for download?', a 'SAVE CERTIFICATE TEMPLATE' button, a 'Copy certificate from' section with a 'Select course' dropdown and a 'COPY' button, and a '< BACK TO COURSE' link.

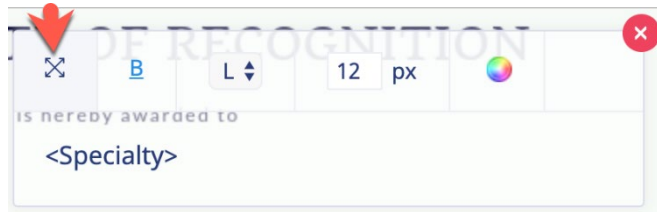
Certificate Orientation:

1. First, select your certificate paper orientation. Your certificate can be any of the following sizes and dimensions:
 - A4 Landscape (842x595 px)

- A4 Portrait (595x842 px)
- Letter Landscape (792x612 px)
- Letter Portrait (612x792 px)







Certificate Background Image:

2. Next, select your certificate back image to upload. Please note that the background image should be the same dimensions as the certificate orientation in step one. Click  **Background** tab to upload your own background design for your certificate of completion. Follow the on-page instructions to add in your certificate background.
 - a. Download free certificate backgrounds at



<https://help.telania.com/en/articles/6139029-certificate-backgrounds>

Customize Certificate Fields:

3. Use the following options, as appropriate, for your Completion Certificate:
 - Add <Trainee Name> by clicking  **Trainee**
 - Add <Instructor Name> by clicking  **Instructor**
 - Add <Course Name> by clicking  **Course**
 - Add other fields including custom fields by clicking  **Other** 
4. To position/reposition inserted fields in your certificate, use the drag-and-drop option within inserted field block. Once the desired position is achieved, feel free to use other formatting like [B], left/right alignment, font size or font color to further customize your certificate. When a field is added to the Template, as shown in the following illustration, you can modify its appearance using the available options. You can set the text alignment as Left (L), Center (C) or Right (R), set the Color for the text by clicking , make the text Bold by clicking **B**, and set the Font Size for the text by modifying the px value.



Certificate Release Options:

5. Select either the **Manually**, **After course completion**, or **After course and quiz completion** option from the **Release Certificate** drop down. For example, you can manage this process manually or issue certificates after a course is completed. You can also set eLeaP to automatically release a certificate if a user has successfully completed a quiz assessment.
6. Toggle the **Certificate Template Ready for Download** option to **ON** or leave it **OFF**, to indicate whether or not the Certificate Template is ready to be downloaded.

Preview Certificate:

7. Once you have added all of the Fields that you are going to use, click [Preview](#) to display a Preview of the Certificate.
8. Once you are satisfied with the options/selections you have chosen, click

SAVE CERTIFICATE TEMPLATE

. As shown in the following illustration, the system confirms that your changes have been saved.

CONTENT

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Lessons

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Glossary

FAQ

Resources

ASSIGN

Users

User Groups

Assigned Learning Paths

ENGAGE

Settings

A4 Landscape

Background

Trainee

Instructor

Course

Other

Preview

TELANIA UNIVERSITY

CERTIFICATE OF RECOGNITION

is 12 px

px

<TraineeName>

for completing the <CourseName>

px

px

Granted this day <ReleaseCertifyDate>

1300 South 4th St, Suite 350, Louisville, KY

Don Bosco, Jr

Chairman, Board of Trustees

<Certificate Number>

Reset Background

Release Certificate

After course and quiz completion

Is the certificate ready for download?

SAVE CERTIFICATE TEMPLATE

Copy certificate from

Select course

COPY

MANAGE COURSES

MY ASSIGNED COURSES

SELF ENROLLMENT COURSES

MANAGE CATEGORIES

MANAGE EVENTS

QUIZ RESULTS

Certificate Template / Sales Training for New Hires

STANDARD

STATS

PREVIEW

The certificate template has been saved

CONTENT

Course Definition

Lessons

Quiz

Glossary

FAQ

Resources

ASSIGN

Users

User Groups

A4 Landscape

Background

Trainee

Instructor

Course

Other

Preview

TELANIA UNIVERSITY

CERTIFICATE OF RECOGNITION

is 12 px

px

<TraineeName>

for completing the <CourseName>

px

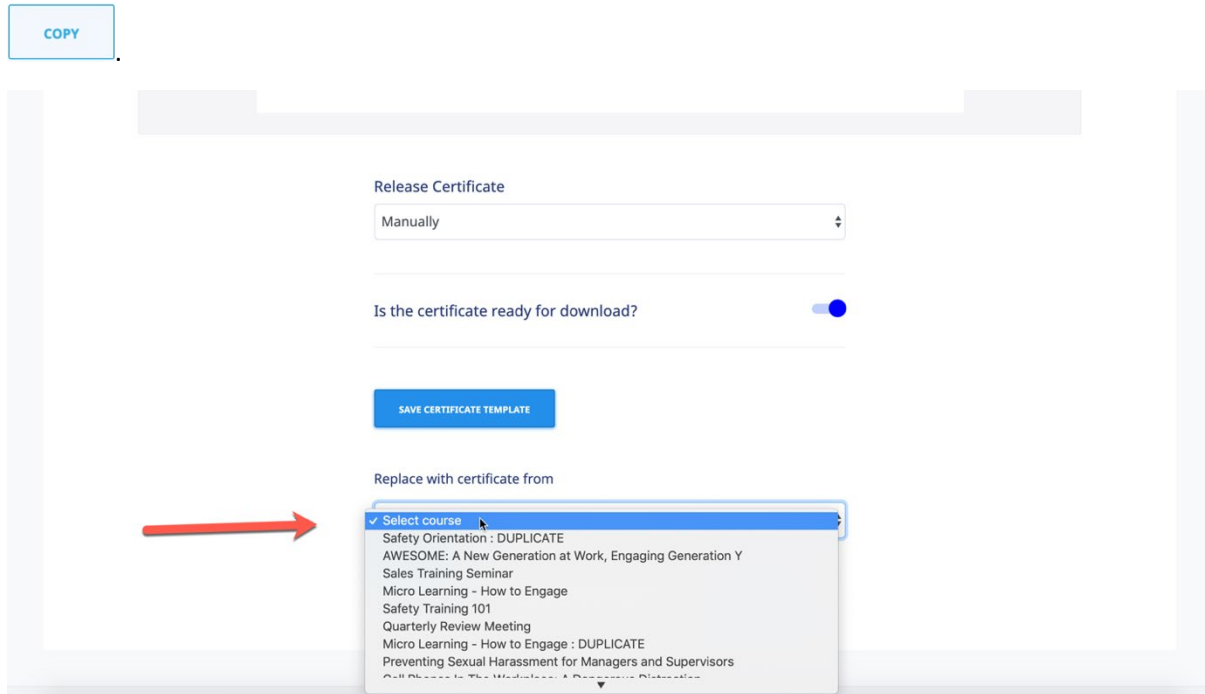
px

Granted this day <ReleaseCertifyDate>

1300 South 4th St, Suite 350, Louisville, KY

Note: If your certificate is set to release upon a successful Quiz completion, you need to make sure you have created and set up or activated your quiz.

To quickly create a new Certificate, you can copy one that was created for another course by selecting that Course on the Copy certificate from drop-down, as shown in the following illustration, and clicking



The screenshot shows the 'Release Certificate' configuration page. At the top left, there is a blue 'COPY' button. Below it, the 'Release Certificate' dropdown is set to 'Manually'. A toggle switch for 'Is the certificate ready for download?' is turned on. A blue 'SAVE CERTIFICATE TEMPLATE' button is present. Below this, the 'Replace with certificate from' dropdown is open, showing a list of courses. A red arrow points to the 'Select course' option at the top of the dropdown list. The list includes: 'Safety Orientation : DUPLICATE', 'AWESOME: A New Generation at Work, Engaging Generation Y', 'Sales Training Seminar', 'Micro Learning - How to Engage', 'Safety Training 101', 'Quarterly Review Meeting', 'Micro Learning - How to Engage : DUPLICATE', and 'Preventing Sexual Harassment for Managers and Supervisors'.

The system displays a warning message before performing the copy function to ensure that is your intention. Click **OK** to perform the copy function.

trainingprovider.2leap.com says

Are you sure?

Cancel

OK

The illustration below shows a completed Certificate Template:

▼

Certificate Template / Sales Training for New Hires

STANDARD

STATS

PREVIEW

The certificate has been copied

CONTENT

Course Definition

Lessons

Quiz

Glossary

FAQ

Resources

ASSIGN

Users

User Groups

A4 Landscape

Background

Trainee

Instructor

Course

Other

Preview

TELANIA UNIVERSITY

CERTIFICATE OF RECOGNITION

To be awarded to

<TraineeName>

Granted this day

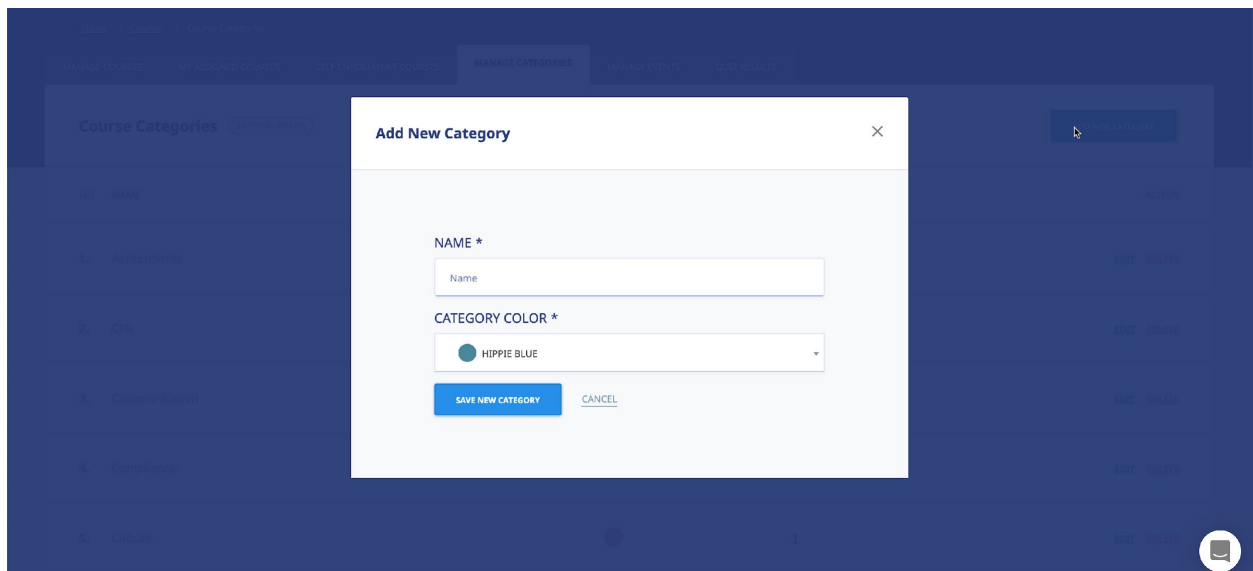
<ReleaseCertifyDate>

1300 South 4th St, Suite 350, Louisville, KY

Categories

Categories are an important way to manage your course content. Think of categories as specific sections that will contain specific types of courses. Say you want to have your content organized by Leadership Training, Compliance, Orientation, Safety and so on, then use the category system to organize them. Course categorization is also a great way to create Learning Paths made of specific courses from specific groups of content.

To create a category, you can go to the **MANAGE CATEGORIES** tab and click the **ADD NEW CATEGORY** button. Enter the name of the new category you want to add. Select the category color you want and [Save New Category]



Edit Categories

To edit categories, click the **EDIT** link to edit the name of the category. Please note that the name of the category can change and does not impact the category ID.

Delete Categories

To delete categories, click the **DELETE** link. Confirm the deletion by clicking the **OK** [Ok] button on the popup message.

Note: You can also create course categories during the course creation process.

Events

Use Events to manage classroom training or Instructor-led training. If you need users to self-enroll for upcoming classes or courses, the Events system will deliver.

Selecting the **MANAGE EVENTS** tab from the MANAGE COURSES menu, displays the Events you have created with **Name**, **Created By**, **Date Created** and **Action** details shown for each Event on the Events list.

NO.	NAME	STARTING	DATE CREATED	ACTION
1.	Sales Team Meeting Sam, Pete	12/22/2021, 11:00 AM (America/New York)	11/30/2021	EDIT DELETE
2.	Staff Meeting Sam, Pete	11/17/2021, 8:00 AM (America/New York)	11/15/2021	EDIT DELETE
3.	new event 123 Sam, Pete	04/15/2021, 12:52 PM (America/New York)	04/15/2021	EDIT DELETE
4.	New event dupli Sam, Pete	04/15/2021, 12:51 PM (America/New York)	04/15/2021	EDIT DELETE
5.	Lapsed event Sam, Pete	03/28/2021, 12:00 AM (America/New York)	04/05/2021	EDIT DELETE
6.	Event in June Sam, Pete	06/09/2021, 12:00 AM (America/New York)	04/01/2021	EDIT DELETE
7.	Event in May Sam, Pete	05/12/2021, 12:00 AM (America/New York)	04/01/2021	EDIT DELETE

You can filter Events displayed by entering Event name and clicking [APPLY FILTERS](#).

Event Courses

Your Events require you to prepare a simple tracking course to be attached to your Event. A simple course can be created in 2 minutes. Here's what do to do:

Add Event Course

Go to [COURSES](#) or click on **MANAGE COURSES** if you are already in the Courses section, click

[ADD NEW COURSE](#) to start adding in your new course.

IMPORTANT: Event courses should not have deadlines set. Also make sure to set Assignment Notifications to **No**. This will ensure that users are not getting conflicting email messages. See an illustration below:

General Settings

Activate / Deactivate Features

Notification Settings

Certificate Settings

Continuing Education Settings

Notification Settings

Assignment Notification

Non Completion Notification

Notification Contact

Select instructor

SAVE NOTIFICATION SETTINGS

You can also duplicate your existing course to make a new course.

Adding a New Event

Selecting the [ADD NEW EVENT](#) link from the **Manage Events** screen displays the **Add Events** screen as shown in the following illustration. Use the steps below to successfully add a new Event to the system.

MANAGE EVENTS ASSIGNED USERS

Edit Event

Attach a course *

Amazing courses

Name *

Sales Team Meeting

Description

Join us for our weekly team meetings.

Location

Zoom

SAVE CANCEL

Event Settings

Seats

8 (0 or empty for 'unlimited')

Starting

Fixed time:

12/22/2021 11 00 AM

Ending

Fixed time:

12/22/2021 12 00 PM

Time Zone

America/New York [EST -05:00]

Public (Attendees can self-enroll) ☒

1. Use the drop-down selector to select a **Course** to attach to your new Event. *Please note that courses are required for Events in order for eLeaP to properly track and document completions. Plus, you can issue certificates, assign quizzes and distribute documents and handouts using the courses. Check the course settings to make sure Assignment notifications are turned off and deadlines are not set.*
2. Enter a **Name** for the new Event in the Name field.
3. Enter a **Description** for your new Event. Descriptions are not mandatory.
4. Enter a **Location** for your new Event

Event Settings

5. Enter the number of available **Seats** for your new Event. You may leave this field blank or 0 (zero) for unlimited seats.
6. Select whether your event starts **Now** or at some future date and time. For a future date and time, select the **Fixed time** option
 - a. Should you select **Fixed time**, use the calendar to select the date and then use the hour selector to select the hour the event starts.
 - b. Use the **minutes** selector to select the minute the event starts. For example, an event that starts at 8:45, you will select 8 for hours and 45 for minutes.
 - c. Use the **AM/PM** selector to indicate if your event starts in the morning or afternoon.
7. Select the **Ending** time for your Event using the same procedure as in (6) above. You may leave it

as **Never** if you don't wish to enter an **Ending** time.

8. Use the **Time Zone** selector to indicate in which time zone your event starting and ending time occurs.
9. Select the option to make this event available for self-enrollment in your Events Calendar.

Public (Attendees can self-enroll)



- a. To make the event available, select **Yes. Attendees can self-enroll.**

ADD EVENT

10. Click **ADD EVENT** to create the new Event. It will now be displayed on the Manage Events screen.


The Events details screen for the newly created Event is displayed in the following illustration. You can click [EDIT](#) to make modifications to the Event.


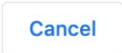
The screenshot shows the 'Manage Events' interface. At the top, there are tabs for 'MANAGE EVENTS' and 'ASSIGNED USERS'. The 'MANAGE EVENTS' tab is active, showing the details for an event titled 'Sales Team Meeting'. In the top right corner of the event details card, there is a blue 'EDIT' button. The event details are organized into a table-like structure with labels on the left and values on the right. The details include: Name (Sales Team Meeting), Description (Join us for our weekly team meetings.), Course (a link to 'Amazing courses'), Seats (8), Available Seats (8), Starting (12/22/2021 11:00 AM (America/New York)), Ending (12/22/2021 12:00 PM (America/New York)), Location (Zoom), Creator (Sam, Pete), Created on (11/30/2021), and Public (Yes - Enrollment page: a long URL). Below this table, there is a purple box with the text 'Invite others by copying and pasting URL into your email program.' and a link to the 'Events Calendar' (another URL).

Name	Sales Team Meeting
Description	Join us for our weekly team meetings.
Course	Amazing courses
Seats	8
Available Seats	8
Starting	12/22/2021 11:00 AM (America/New York)
Ending	12/22/2021 12:00 PM (America/New York)
Location	Zoom
Creator	Sam, Pete
Created on	11/30/2021
Public	Yes - Enrollment page: https://trainingprovider.eleapdev.com/enroll/?e=9318309c77977db1ffdadcdce695531fa
Invite others by copying and pasting URL into your email program.	
Events Calendar	https://trainingprovider.eleapdev.com/enroll/upcoming

You can also click on the Course link to see the details of the Event-associated course. You can make modifications to your course including adding materials, setting up quizzes, or even adding in certificates and many other features.

Edit Event

To edit an Event, go to the Manage Events screen and click on  next to the Event you want to edit. You can then proceed to change any existing information or setting of the Event you are editing.

When done, click the  to make your changes permanent or  to leave the edit screen and go back to the Events listing page.

Delete Event

To delete an Event, click the **DELETE** link in next to the Event in your Event listing.

You will need to confirm your delete attempt by clicking [OK] on the confirmation window.

trainingprovider.2leap.com says

This will delete this event and all data associated with it. Deletion is FINAL and irrecoverable! CONTINUE?

 Cancel

 OK

Note: Delete is final and irrecoverable. Your Event data will be lost and we cannot retrieve. Please use only if you are sure you want to delete your Event.

Self-Enrollment

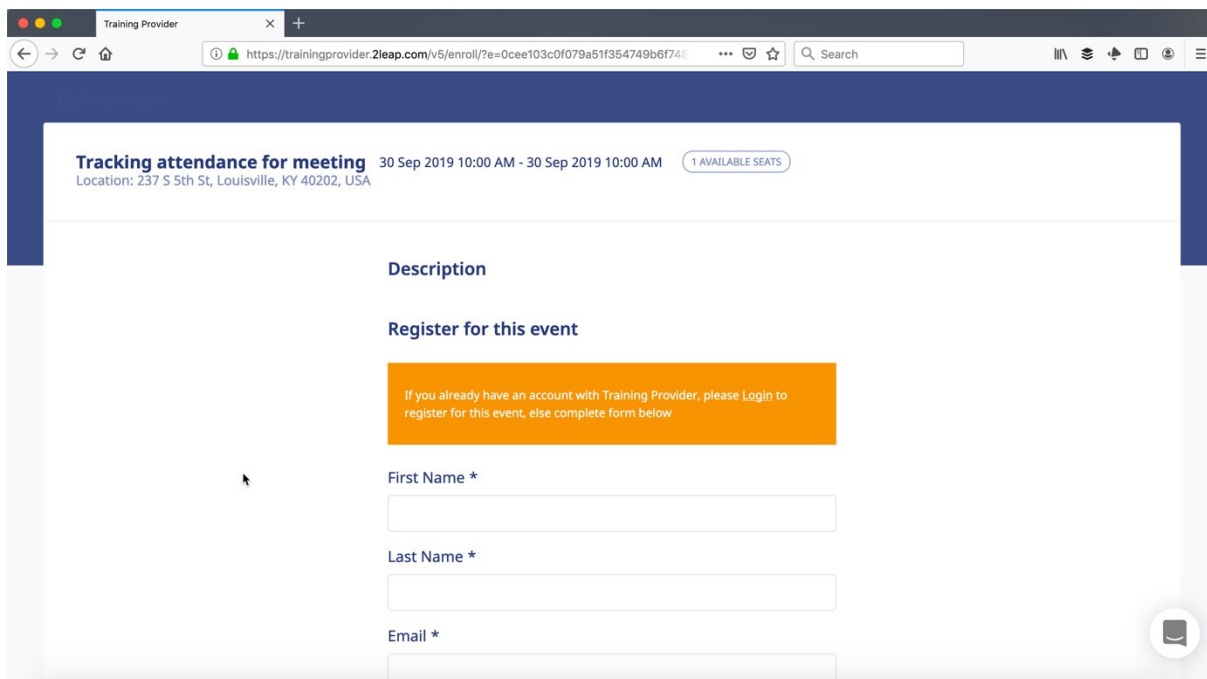
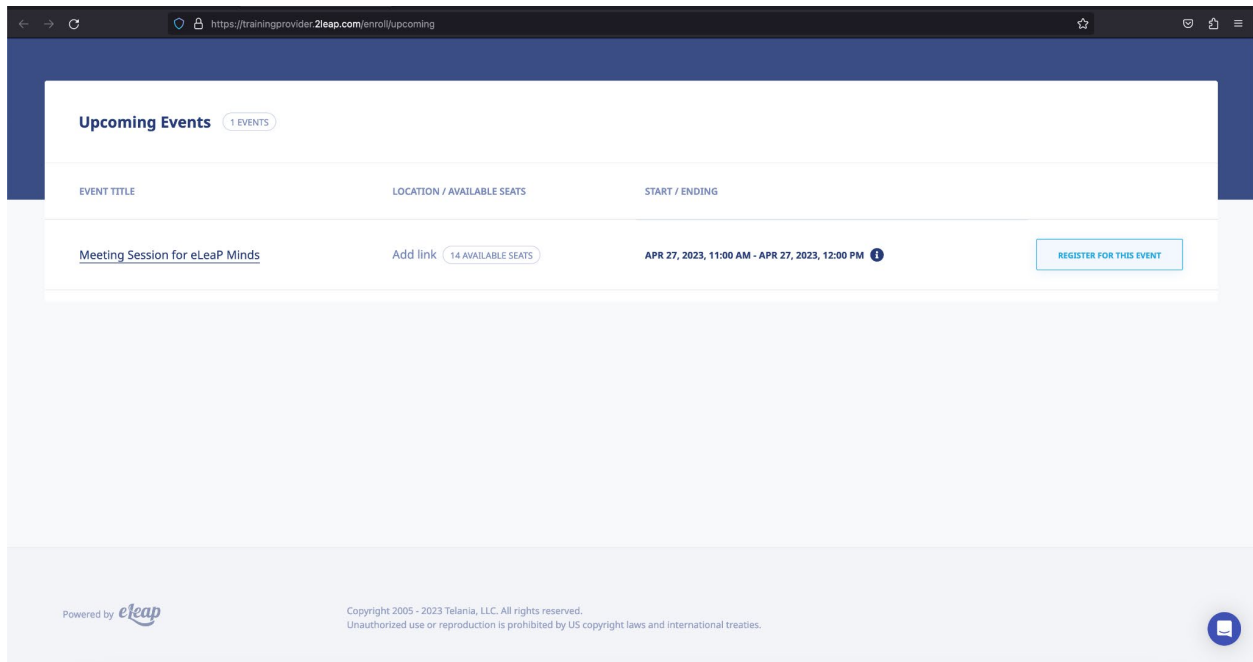
eLeaP has made it easy to invite attendees to your event(s). Simply click on the Public link displayed to see the specific Event registration page. You can copy and paste this link into your favorite email program to invite attendees to register for your event.

Another option is to share your Events Calendar link on your website, intranet or via email. Simply copy the link provided and add it to any location your attendees can go to register for your event(s). Your Events Calendar link will be something like <https://youreleapaccount.2leap.com/enroll/upcoming>

Event Registration page

When your attendees go to an Event registration, they will see the option to either log in to register (for users who already have an account in your company), or to enter their name and email as well as password to create an account to register.

eLeaP Administrator's Manual (V5+CEM)



If your event is full, the following message will appear:

We're sorry this event is full. You can however still register to be put on the waiting list.

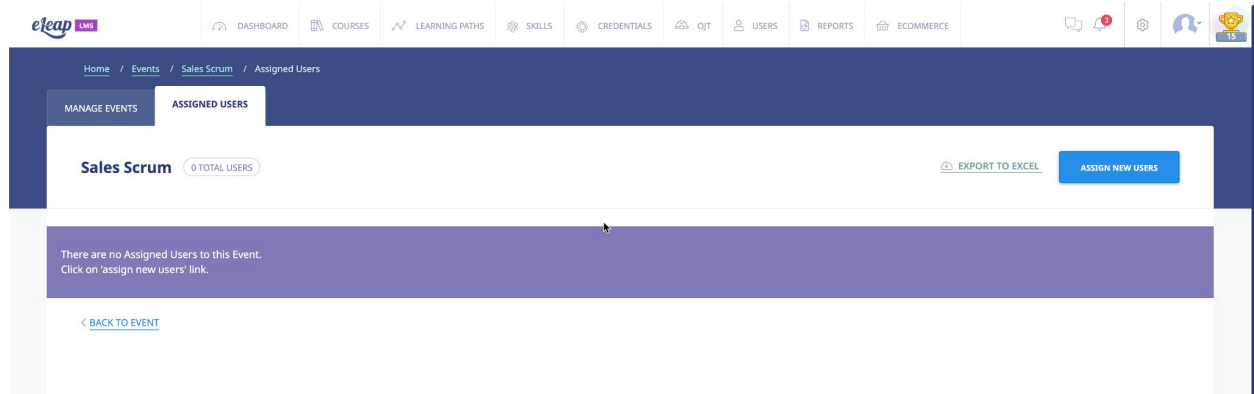
Subsequent registrations will be held in Pending **PENDING** status. See more about Event statuses below.

You should see your existing attendees or assigned users in your Event.

Event Assignment

While you can enable the public self-enrollment option for your attendees, you can also directly assign your existing users to your events. A direct assignment is quick and ensures that only the right attendees show up for your Event.

To assign users to your Event, click the **ASSIGNED USERS** tab from the Event details screen.



To assign users to your new Event, click the **ASSIGN NEW USERS** button. You can then filter your list by user **Name**, Access **Level** or **User Group** membership.

MANAGE EVENTS

ASSIGNED USERS

How to handle the new OSHA regulations. 52 TOTAL USERS

[Show custom fields filters](#)

NO.	<input type="checkbox"/> NAME	LEVEL	EMAIL	↓ INSERT DATE	ACTIVE
1.	<input type="checkbox"/> Cook, George	Administrator	team+training@telaniamail.com	03/09/2017	✓
2.	<input type="checkbox"/> user10, Alan	Trainee	telania+user5@gmail.com	03/09/2017	✗
3.	<input type="checkbox"/> user11, Michelle	Trainee	telania+user6@gmail.com	03/09/2017	✓
17.	<input type="checkbox"/> Testing2, Testing2	Trainee	Testing2@eleapsoftware.com	09/18/2017	✓
18.	<input type="checkbox"/> Elise, Samuel	Instructor	sam@excelentsoftware.com	09/18/2017	✓
19.	<input type="checkbox"/> Snow, John	Trainee	don+snow@eleapsoftware.com	09/28/2017	✓
20.	<input type="checkbox"/> Johnson, Sam	Trainee	contact@elearninginside.com	10/06/2017	✓

<

1

2

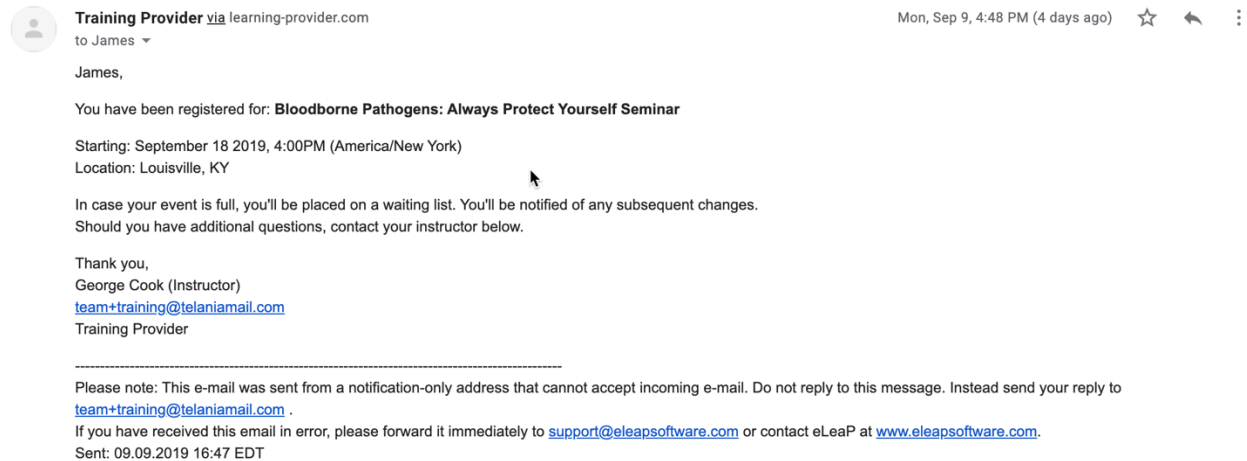
3

>

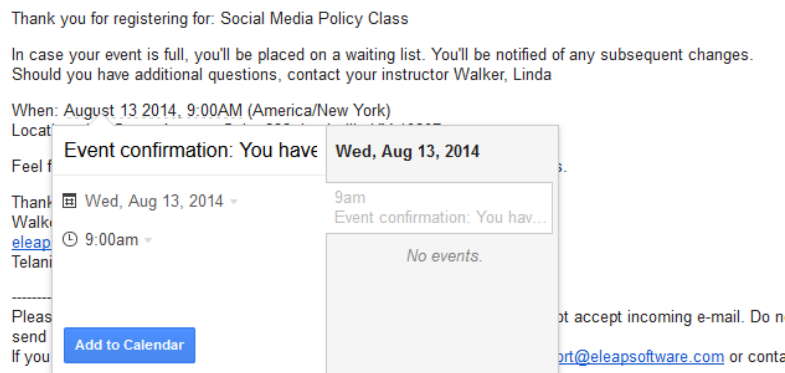
[BACK TO EVENT](#)

Check the boxes next to the names you wish to add to your Event and click to add attendees to your Event.

Once added, your attendees will receive an Event confirmation message like:



Note: Most modern email programs will enable users to click on the Event Date to add the Event reminder to their own calendar.



Event Status

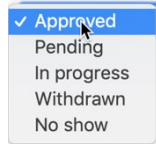
The Events System has two main statuses: **Registration Status** and **Event Completion Status**.

Event Registration Status

Event **Registration** status indicates the current status of a user's registration for the specific event. Event registration can be:

- **APPROVED** (Approved):
 - An Event user is automatically **approved** if their registration occurs before the Event **Start time** and if the registration did not occur after the maximum number of seats allowed has been reached. For example, if you create an event with 5 seats, the first 5 users you add to the event or self-register for the event will automatically be **approved**.

- o The 6th registrant and subsequent ones will be held in a wait list with the word 'waiting' added to their names - *Tester 123, Tester (Waiting)*
- o You can move a user from the **Waiting** list to **Approved** by clicking on the [Pending] status to reveal a drop-down with options to select Approved, Withdrawn or Pending -



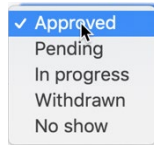
Note: Please be careful with changing Event Statuses as this triggers an email notification to the specific user.

- **PENDING** (Pending):
 - o A **Pending** Event status indicates that there have been more registrations than the allowed number of seats. All Pending registrations will have been warned about the event being full.
 - o An attendee in the **Pending** status will receive an email notification indicating their Event status.
 - o Any changes to the **Pending** event status will trigger an email alert to the specific users. For example, if you change a **Pending** user to '**Approved**' or even '**In Progress**,' eLeaP will send an email alerting the user as to their new status.
 - o You must first change a user's **Pending** status to '**Approved**' or '**Withdrawn**' before you or the system can automatically assign a course to them for completion purposes.
- **Withdrawn** (Withdrawn):
 - o A **Withdrawn** status is when you need to leave a user in the list of registered users but yet indicate the user as no longer part of the active attendees.
 - o You can add the Withdrawn user back into the list of assigned users.

Event Completion Status

Event **Completion** status refers to what happened to the registration and subsequent event attendance and completion. Now that a user has registered for your event, are they:

- **IN PROGRESS** (In progress):
 - o eLeaP automatically assigns the associated Event course to your assigned users on the day of the Event. This is how the system can help you track and document your Event attendance and completion.
 - o You can force the [**In Progress**] status change by clicking on the Status field and using the drop down selector to choose the relevant new status; in this case **In Progress**.



- **NO SHOW** (No show):
 - A **No Show** designation means the registered attendee failed to show up at the Event. Use this to conduct your Roll Call.
 - You can change a **No Show** status to **In Progress** or even **Completed** should you decide it is needed.
- **COMPLETED** (Completed):
 - Setting a **Completed** designation or status is the final goal of your Event manager. Once attendees complete the class and course, you may choose to finalize their status by selecting the [**Completed**] design from the status option.
 - If a course is created with a certificate of completion, a course completion certificate can trigger a certificate release. Depending on the individual certificate settings in your associated course, you might have to manually release certificates by clicking the red icon (⊗) in the Certificate column.
 - Please note that eLeaP will send a certificate release notification to the completed user.

Sample Event Status

The illustration below shows a sample Event with the various statuses we discussed above.

Home / Events / All Hands Meeting / Assigned Users							
MANAGE EVENTS		ASSIGNED USERS					
All Hands Meeting		5 TOTAL USERS		EXPORT TO EXCEL		ASSIGN NEW USERS	
NO.	NAME	LEVEL	EMAIL	STATUS	COURSE COMPLETION	CERTIFICATE	INSERT DATE
1.	Anisti, Cristos	Trainee	don+christos@telaniamail.com	COMPLETED	100% COMPLETED	✓	12/08/2021
2.	Arthur, Cleveland	Trainee	don+okta@telaniamail.com	IN PROGRESS	0% NOT STARTED	✗	12/08/2021
3.	James, Brother	Trainee	brother@james.com	NO SHOW	0%	✗	12/08/2021
4.	Snow, John	Trainee	don+snow@eleapsoftware.com	COMPLETED	100% COMPLETED	✓	12/08/2021
5.	Blao, Kai (Waiting)	Trainee	kai@kay.com	PENDING	0%	✗	12/08/2021


Event Reports

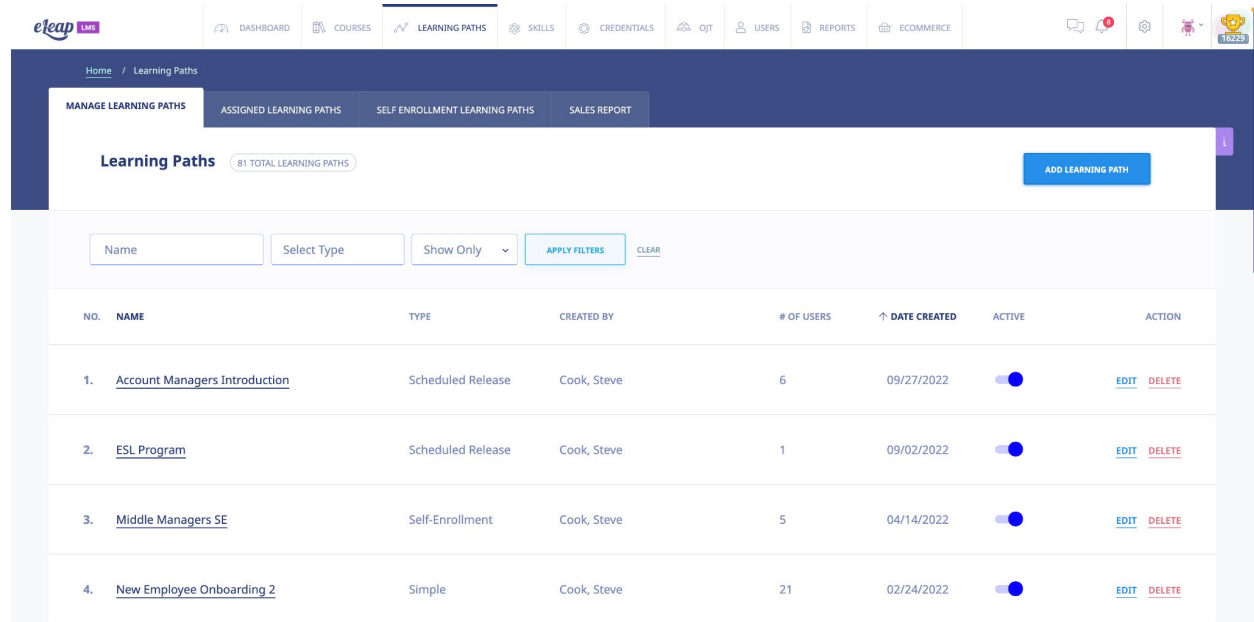
Your Event status displayed (see above) can also be downloaded or exported out of eLeaP. To download your Event report, click [EXPORT TO EXCEL](#) from your Event Assigned Users screen.

Your Excel download will look something like:

AutoSave OFF							
All Hands Meeting							
Home Insert Draw Page Layout Formulas Data Review View Acrobat Tell me							
<div> <div>Paste</div> <div>Cut Copy Format</div> <div>Arial 10 A⁺ A⁻</div> <div>B I U</div> <div> <div> <div> <div></div> <div></div> </div> </div> <div> <div></div> <div></div> </div> </div> <div> <div></div> <div></div> </div> <div> <div></div> <div></div> </div> </div> <div> <div>ab</div> <div>Wrap Text</div> </div> <div> <div>General</div> <div>\$ %</div> </div>							
A1	Full Name						
	A	B	C	D	E	F	G
1	Full Name	Level	Email	Event Status	Certificate	Date	
2	Anisti, Cristos	Trainee	don+christos@telaniamail.com	Completed	YES	12/08/2021	
3	Arthur, Cleveland	Trainee	don+okta@telaniamail.com	In progress	NO	12/08/2021	
4	James, Brother	Trainee	brother@james.com	No show	NO	12/08/2021	
5	Snow, John	Trainee	don+snow@eleapsoftware.com	Completed	YES	12/08/2021	
6	Blao, Kai	Trainee	kai@kay.com	Pending	NO	12/08/2021	
7							
8							
9							
10							

Learning Paths

Selecting  **LEARNING PATHS** on the main menu bar displays the **Learning Paths** screen, with the **MANAGE LEARNING PATHS** tab selected, as shown in the following illustration. A Learning Path is a collection of courses that the student must complete in order to achieve the defined Learning Path's certification. Each Learning Path that you create is displayed on the **Learning Paths** list, with the **Name**, **Created By**, **Date Created**, and the **Active/Inactive** status details shown for that specific Learning Path.



The screenshot shows the eLeaP Learning Paths interface. The top navigation bar includes the eLeaP logo and various menu items: DASHBOARD, COURSES, LEARNING PATHS (selected), SKILLS, CREDENTIALS, OJT, USERS, REPORTS, and ECOMMERCE. Below the navigation bar, the 'Learning Paths' section is displayed with a sub-header '81 TOTAL LEARNING PATHS' and an 'ADD LEARNING PATH' button. The main content area features a table with the following columns: NO., NAME, TYPE, CREATED BY, # OF USERS, DATE CREATED, ACTIVE, and ACTION. The table lists four learning paths, all created by 'Cook, Steve' and currently active.

NO.	NAME	TYPE	CREATED BY	# OF USERS	DATE CREATED	ACTIVE	ACTION
1.	Account Managers Introduction	Scheduled Release	Cook, Steve	6	09/27/2022	<input checked="" type="checkbox"/>	EDIT DELETE
2.	ESL Program	Scheduled Release	Cook, Steve	1	09/02/2022	<input checked="" type="checkbox"/>	EDIT DELETE
3.	Middle Managers SE	Self-Enrollment	Cook, Steve	5	04/14/2022	<input checked="" type="checkbox"/>	EDIT DELETE
4.	New Employee Onboarding 2	Simple	Cook, Steve	21	02/24/2022	<input checked="" type="checkbox"/>	EDIT DELETE

Adding a New Learning Path

Clicking the **ADD LEARNING PATH** button within the Learning Path screen's **Manage Learning Paths** tab displays the **Add Learning Path** screen, as shown in the following illustration. Use the steps below to add a Learning Path to the system.

1. Enter a Name for the new Learning Path in the **Name** field.
2. Enter a Description for the new Learning Path within the **Description** box.
3. Select **YES** from the **Active** list to make the new Learning Path **Active** or select **NO** to make it **Inactive**.
4. Select the type of Learning Path you want to create. We have 4 types of Learning Paths:
 - a. **Simple:** A simple Learning Path allows courses to be added to a simple container for courses. A simple Learning Path does not require prerequisites or specific navigation paths.
 - b. **Pre-Set Navigation:** Pre-Set Navigation is designed to set navigation rules in a Learning Path. Use Pre-set Navigation to enforce prerequisites. You can also use quiz passing as a condition for progression in the Learning Path.
 - c. **Self-Enrollment:** Use the Self-Enrollment option to create internal Course Catalogs which your assigned Users can then select from. The Self-Enrollment system does not penalize users for not viewing Courses and they can select which Courses they are interested in.
 - a. Self-Enrollment restriction:
 - i. **All Users:** Any user in your account can self-enroll in this learning path.
 - ii. **Specific User Groups:** Only users in selected user groups can self-enroll in this learning path.
 - d. **Scheduled Release:** A Scheduled Release Learning Path is designed to set the release

date of the courses in the Learning Path. This is a great way to schedule long term training courses.

Click **ADD LEARNING PATH** to create the new Learning Path. It will be displayed on the **Learning Paths** list, in alphabetical order.

Adding Courses to a Learning Path

Selecting a Learning Path's Name on the **Learning Paths** list displays the **Learning Path Details** screen, illustrated below. Selecting the [ADD NEW COURSES](#) or the [MANAGE TRAINING PATH](#) link on this screen allows you to build a list of Courses that the student must successfully complete before they can be certified as having satisfied all the requirements necessary for that Learning Path.

Home / Learning Paths / SOP's for Team Meta

LEARNING PATH DETAILS ASSIGNED USERS ASSIGNED USER GROUPS ECOMMERCE

SOP's for Team Meta 2 COURSES [COMPLETION REPORT](#) [MANAGE LEARNING PATH](#) [DUPLICATE](#)
by Sam, Pete, created on 25 Oct 2021

Path Completion

50% COMPLETED

33 %

2 COMPLETED 2 NOT COMPLE...
2 IN PROGRESS 0 NOT STARTED

Quizzes Taken

83% PASSED

83 %

5 PASSED 0 NEEDS GRADI...
1 FAILED

Average Quiz Score

83% PASSED

83 %

83% PASSED
17% ROOM TO IMPROVE

Completion by Course

75% OSHA Safety - Remote Staff

75% Lockout Tagout - Saves

Courses 2 COURSES [ADD NEW COURSES](#)

COURSE NAME / INSTRUCTORS	DEADLINE	ACTIVE
OSHA Safety - Remote Staff Sam, Pete	-	<input checked="" type="checkbox"/>
Lockout Tagout - Saves Sam, Pete	-	<input checked="" type="checkbox"/>

Completion Report 4 USERS [DOWNLOAD COMPLETION REPORT AS XLS](#) [DOWNLOAD STATS AS PDF](#)

User or Email Select User Group [FILTER](#) [Show custom fields filters](#)

NAME / EMAIL	PROGRESS	QUIZ	COMPLETED DATE	DEADLINE
Arthur, Cleveland don+okta@telaniamail.com	50% IN PROGRESS	N/A	N/A	N/A
Snow, John don+snow@leapsoftware.com	100% COMPLETED	N/A	10/25/2021	N/A
Sam, Sam don+sam1@telaniamail.com	100% COMPLETED	N/A	11/16/2021	N/A
Sam, Pete team+training@telaniamail.com	50% IN PROGRESS	N/A	N/A	N/A

When you click the **add new courses** link, the **Add New Courses** screen is displayed, as shown in the following illustration. You can filter the Courses list by entering a Name in the **Name** field and by selecting a Course Category from the **Course Category** list, or both, and then clicking [FILTER](#). Use the steps below to successfully add new Courses to a Learning Path.

On this screen, select the check box for each Course that you want to add to the Learning Path, and then click [ADD SELECTED](#).

eLeaP Administrator's Manual (V5+CEM)

Home / Learning Paths / SOP's for Team Meta / Add Courses

LEARNING PATH DETAILS ASSIGNED USERS ASSIGNED USER GROUPS ECOMMERCE

SOP's for Team Meta - Add New Courses (157 TOTAL COURSES)

Name Select Course Category FILTER

NO.	<input type="checkbox"/>	NAME	DESCRIPTION	INSTRUCTOR	INSERT DATE	ACTIVE
1.	<input type="checkbox"/>	3 CEU's For DW	test description	Sam, Pete	10/16/2021	✓
2.	<input type="checkbox"/>	35-Hr. California Broker Real Estate License Course sample sample sample	California RE agent training for 35 credits	Sam, Pete	09/10/2021	✓
3.	<input type="checkbox"/>	35-Hr. California Broker Real Estate License Course sample sample sample sample : DUPLICATE	California RE agent training for 35 credits	Sam, Pete	11/02/2021	✓
4.	<input type="checkbox"/>	55-Hr. Illinois Broker Real Estate License Packages	Illinois requires two courses to get your real estate license: ...	Sam, Pete	09/17/2021	✓
5.	<input type="checkbox"/>	A new way to do things		Cena, Jon	11/11/2021	✓
6.	<input type="checkbox"/>	Accident Investigation	Many think when an accident occurs at work only an ...	Sam, Pete	03/16/2017	✓
7.	<input type="checkbox"/>	Activate course		Sam, Pete	11/12/2020	✓
8.	<input type="checkbox"/>	Activate course : DUPLICATE		Sam, Pete	11/12/2020	✓
9.	<input type="checkbox"/>	Add your course		Sam, Pete	11/15/2021	✓
10.	<input type="checkbox"/>	Adding a new course		Sam, Pete	11/12/2020	✓

As shown in the following illustration, the Courses that you selected are added to the **Learning Path Details** screen.

Home / Learning Paths / SOP's for Team Meta

LEARNING PATH DETAILS ASSIGNED USERS ASSIGNED USER GROUPS ECOMMERCE

SOP's for Team Meta / Edit (3 COURSES) [LEARNING PATH REPORT](#) [ADD NEW COURSES](#)

The selected Courses have been added to this Learning Path

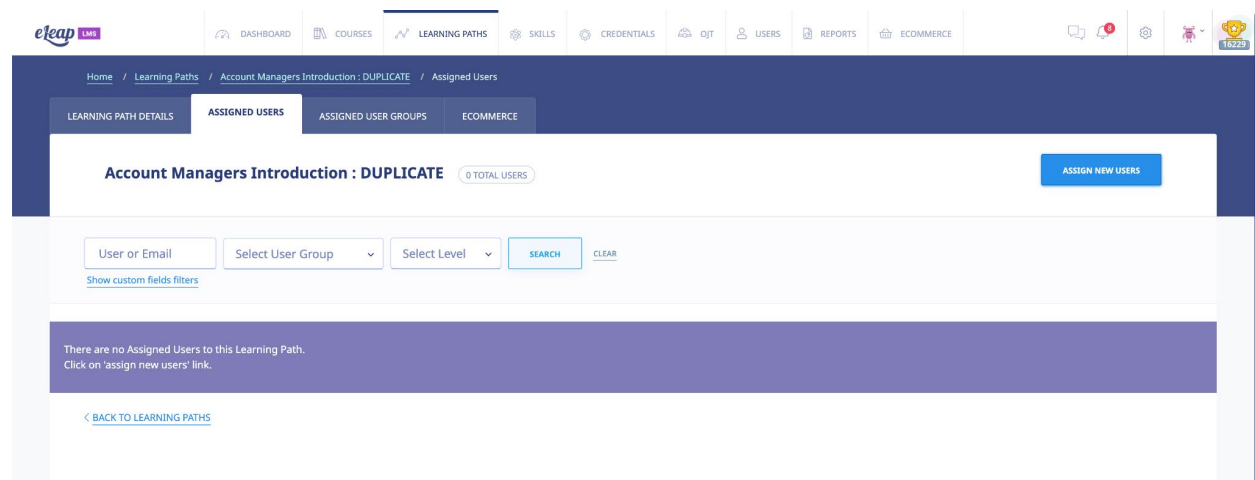
<input type="checkbox"/>	COURSE NAME / INSTRUCTORS	DEADLINE	ACTIVE	ORDER
<input type="checkbox"/>	OSHA Safety - Remote Staff Sam, Pete	-	●	↓
<input type="checkbox"/>	Lockout Tagout - Saves Sam, Pete	-	●	↑↓
<input type="checkbox"/>	Accident Investigation Sam, Pete	-	●	↑

Don't forget to set toggle the Learning Path to ON  if you want to activate your New Learning Path.

Note: You can edit your Learning Path, add and delete courses and also assign mandatory Quiz or assessments for the individual courses in that Learning Path.

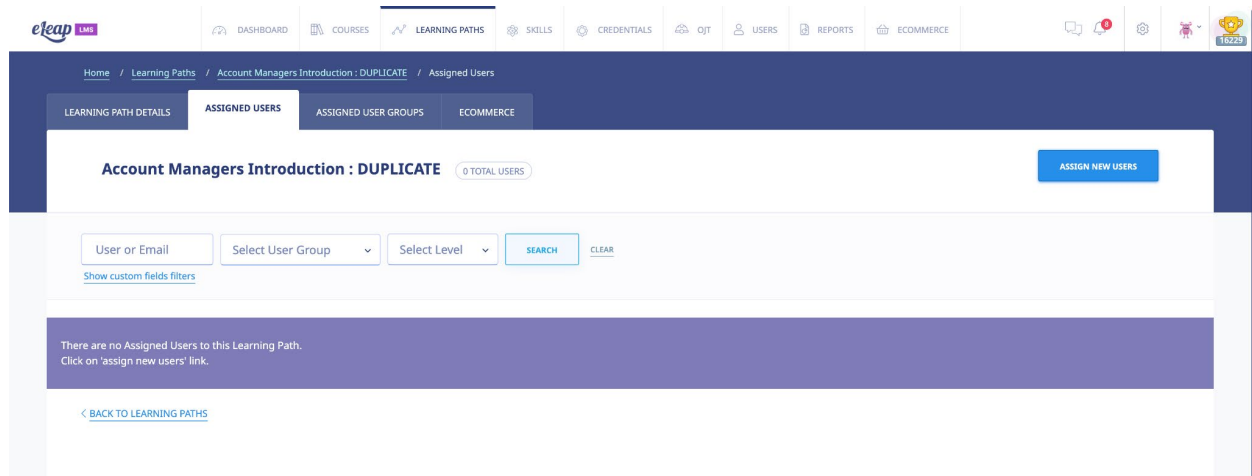
Assigned Users

Selecting the **ASSIGNED USERS** tab on the **Learning Path Details** screen displays the **Assigned Users** screen, illustrated below. This screen displays all of the Users associated with this Learning Path. You can click the **assign new users** link to add additional Users to a Learning Path, and you can select the check box for any existing Users on the **Assigned Users** list and then click the **unassign users from Learning Path** link to remove them from the list.



Assigned User Groups

Selecting the **ASSIGNED USER GROUPS** tab on the **Learning Path Details** screen displays the **Assigned User Groups** screen, illustrated below. This screen displays all of the Users associated with this Learning Path. You can click the **assign new User Groups** link to add additional User Groups to a Learning Path, and you can select the check box for any existing User Group on the **Assigned User Groups** list and then click the **unassign User Groups from Learning Path** link to remove them from the list.



Completion Report

The new Learning Path system displays a report summary once you click on the Learning Path name. The Path Completion, Quizzes Taken, Average Quiz Score, and Completion By Course charts provide a quick insight into the status of your Learning Path. Further, selecting the [COMPLETION REPORT](#) tab on the **Learning Path Details** screen displays the Completion Report details for your assigned users, as shown in the following illustration. A Summary Report bar is presented, with a numerical representation of the progress that has been made on this Learning Path. You can filter by user name or user group. You can also filter by Custom Fields. To filter simply select or enter input and click [FILTER](#).

[Accident Investigation](#)
Sam, Pete

Completion Report 4 USERS [DOWNLOAD COMPLETION REPORT AS XLS](#) [DOWNLOAD STATS AS PDF](#)

User or Email Select User Group [FILTER](#) [Show custom fields filters](#)

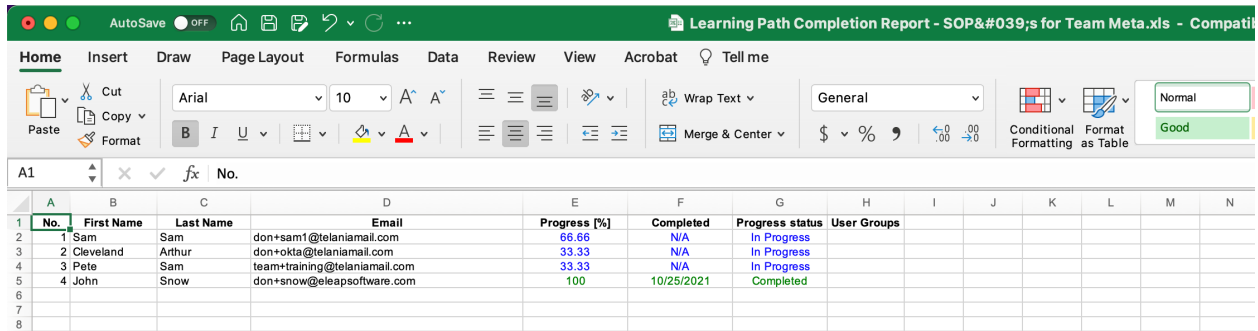
NAME / EMAIL	PROGRESS	QUIZ	COMPLETED DATE	DEADLINE
Sam, Sam don+sam1@telaniamail.com	66% IN PROGRESS	N/A	N/A	N/A
Arthur, Cleveland don+okta@telaniamail.com	33% IN PROGRESS	N/A	N/A	N/A
Sam, Pete team+training@telaniamail.com	33% IN PROGRESS	N/A	N/A	N/A
Snow, John don+snow@eleapsoftware.com	100% COMPLETED	N/A	10/25/2021	N/A

4 Total Users [BACK TO LEARNING PATHS](#)

Additionally, you can click the [DOWNLOAD COMPLETION REPORT AS XLS](#) or [DOWNLOAD STATS AS PDF](#) links to

export the Completion Report or Stats Report to a local drive on your computer.

As shown in the following illustration, when the report opens in Excel, you can see the **First Name, Last Name, Email, Progress (%), Progress status** and **User Groups** details for each user who has been assigned to the Learning Path.



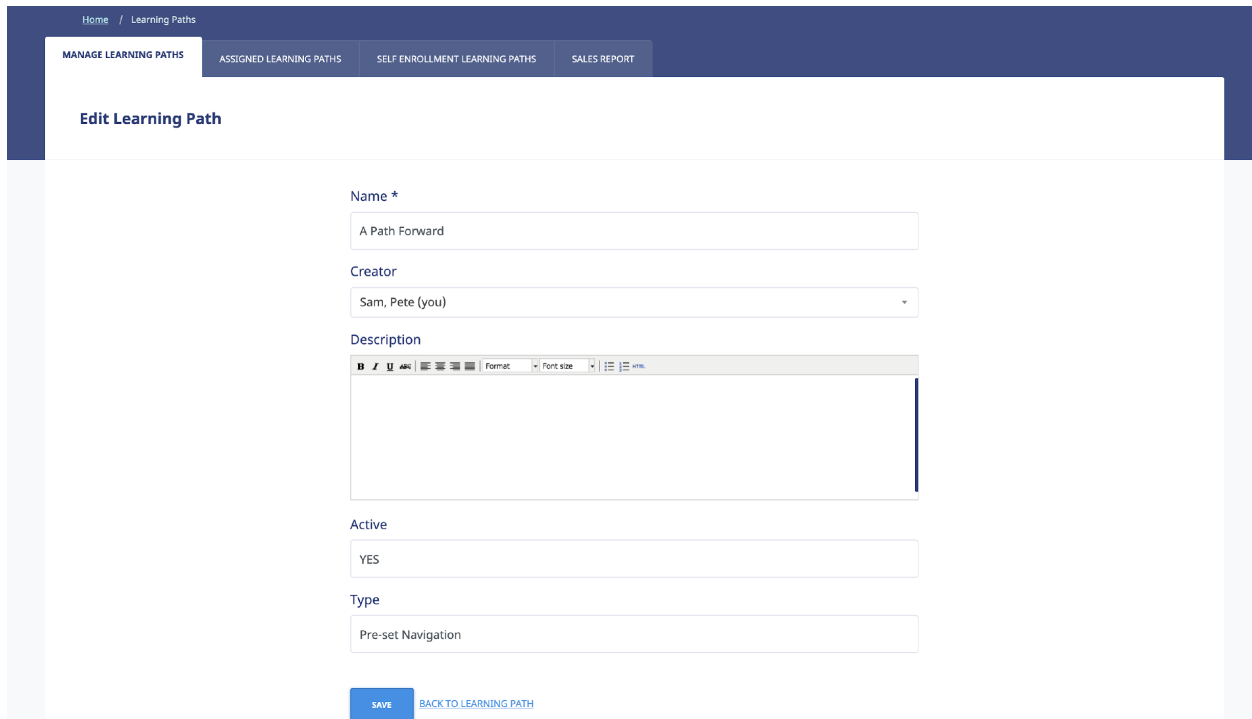
The screenshot shows an Excel spreadsheet with the following data:

No.	First Name	Last Name	Email	Progress [%]	Completed	Progress status	User Groups
1	Sam	Sam	don+sam1@telaniamail.com	66.66	N/A	In Progress	
2	Cleveland	Arthur	don+okta@telaniamail.com	33.33	N/A	In Progress	
3	Pete	Sam	team+training@telaniamail.com	33.33	N/A	In Progress	
4	John	Snow	don+snow@leapsoftware.com	100	10/25/2021	Completed	

Editing a Learning Path

Clicking the edit link for a line on the **Learning Paths** list on the **Learning Paths** screen displays the **Edit Learning Path** screen, illustrated below. Use this screen to make any modifications necessary to the

Learning Path's details and then click [SAVE](#) to save your changes to the system.



The screenshot shows the 'Edit Learning Path' form with the following fields:

- Name ***: A Path Forward
- Creator**: Sam, Pete (you)
- Description**: (Empty text area)
- Active**: YES
- Type**: Pre-set Navigation

At the bottom, there are two buttons: [SAVE](#) and [BACK TO LEARNING PATH](#).

You can also click the **ADD LEARNING PATH** button to add an additional Learning Path to the system or select the **edit** or **delete** link for any of the existing Learning Paths on the **Learning Paths** list to either edit or delete that specific Learning Path.

Duplicating a Learning Path

To quickly create a learning path you can duplicate an existing path. Note that while the courses in the path are duplicated in the new path the assigned users are not.

To duplicate a learning path, click the [Duplicate] link in the top right corner of the learning path.

Home / Learning Paths / Account Managers Introduction : DUPLICATE

LEARNING PATH DETAILS

Account Managers Introducti... 5 COURSES

COMPLETION REPORT MANAGE LEARNING PATH **DUPLICATE**

Path Completion

0% COMPLETED

Quizzes Taken

0% PASSED

Average Quiz Score

0% PASSED

Completion by Course

This learning path has no completion reports yet. Try again after your trainees take the courses.

Courses 5 COURSES

ADD NEW COURSES

COURSE NAME / INSTRUCTORS	RELEASE	DEADLINE	ACTIVE
SOP XYZ - SR - 1 Cook, Steve	Immediate - Change	15 days	ON

Deleting a Learning Path

Selecting the **delete** link for a line on the **Learning Paths** list within the **Learning Paths** screen allows you to remove that Learning Path from the system. The system displays a warning message, as shown in the

following illustration, before performing the deletion to ensure that is your intention. Click **OK** to proceed with the deletion or click **Cancel** to cancel the deletion process.

trainingprovider.2leap.com says

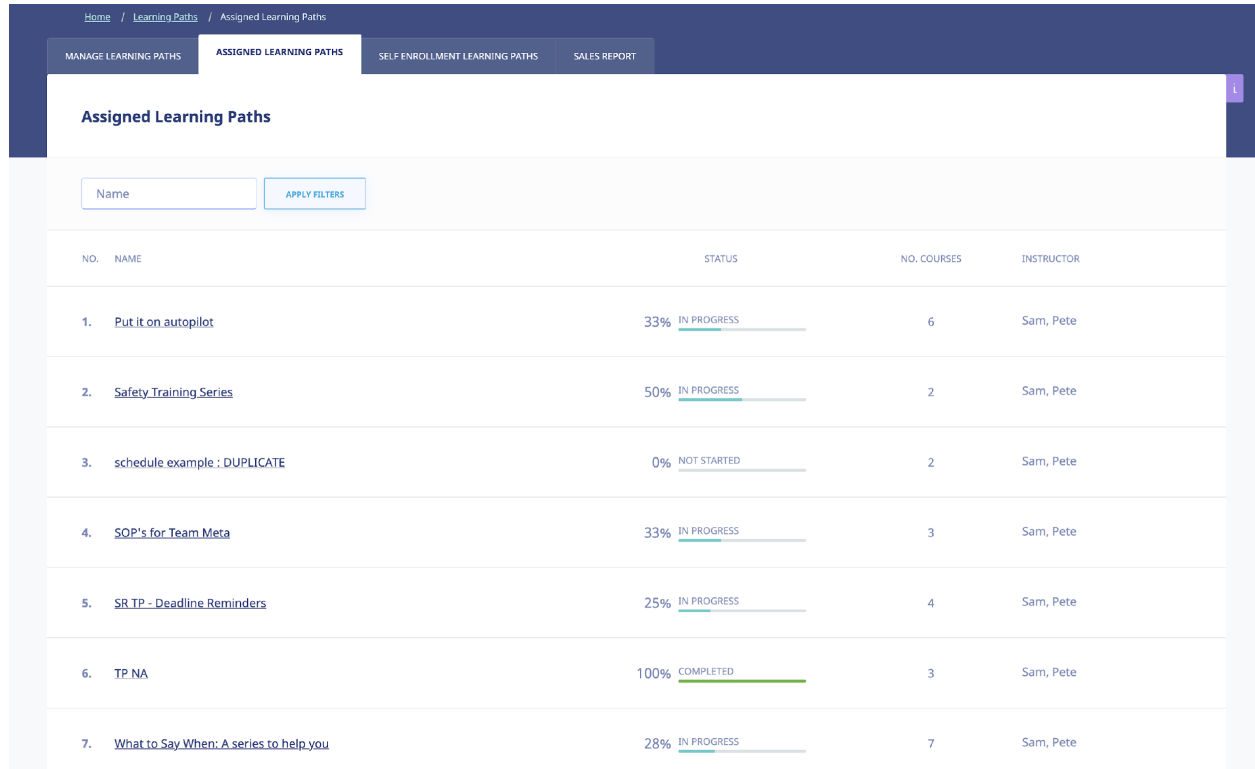
Are you sure you want to delete this Learning Path?

Cancel

OK

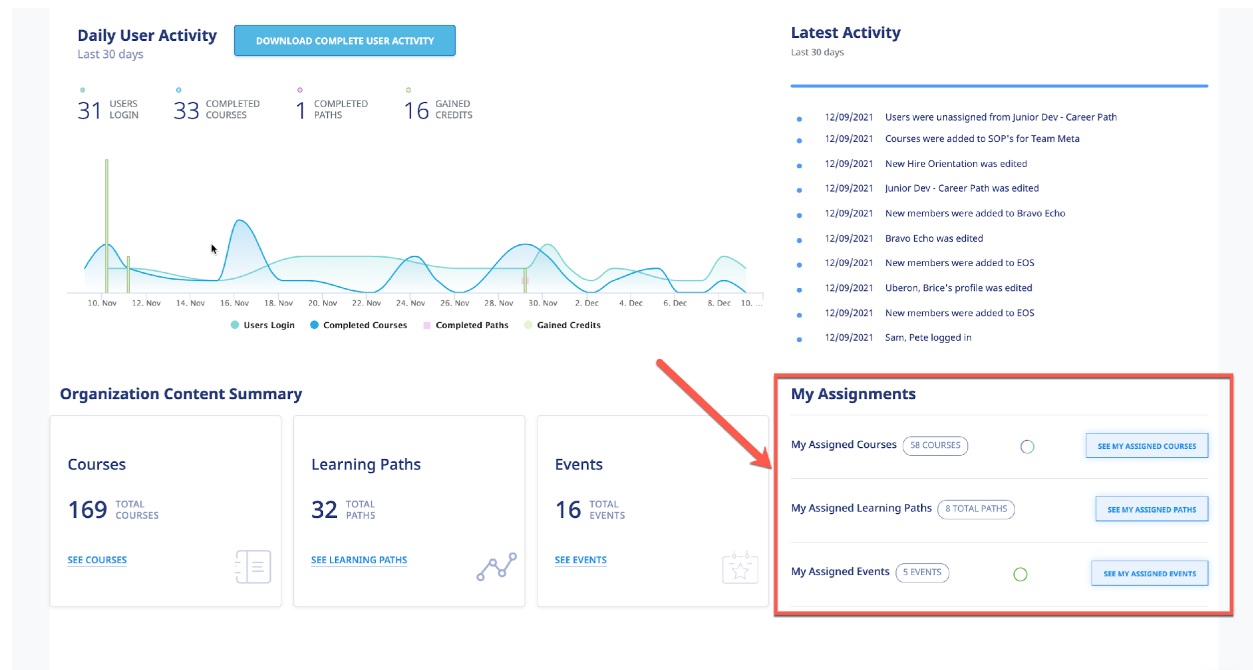
Assigned Learning Paths

Selecting the **ASSIGNED LEARNING PATHS** tab on the **Learning Paths** screen displays the **Assigned Learning Paths** screen, illustrated below. This screen displays the Learning Paths that you have been assigned to, with the **Name**, **Status**, **No. Courses** and **Instructor** details for the Learning Path Displayed. You can filter the Learning Paths listed here, if necessary, by enter a Learning Path Name in the Name field, and then clicking **APPLY FILTERS**.



Home / Learning Paths / Assigned Learning Paths				
MANAGE LEARNING PATHS ASSIGNED LEARNING PATHS SELF ENROLLMENT LEARNING PATHS SALES REPORT				
Assigned Learning Paths				
Name APPLY FILTERS				
NO.	NAME	STATUS	NO. COURSES	INSTRUCTOR
1.	Put it on autopilot	33% IN PROGRESS	6	Sam, Pete
2.	Safety Training Series	50% IN PROGRESS	2	Sam, Pete
3.	schedule example : DUPLICATE	0% NOT STARTED	2	Sam, Pete
4.	SOP's for Team Meta	33% IN PROGRESS	3	Sam, Pete
5.	SR TP - Deadline Reminders	25% IN PROGRESS	4	Sam, Pete
6.	TP NA	100% COMPLETED	3	Sam, Pete
7.	What to Say When: A series to help you	28% IN PROGRESS	7	Sam, Pete

Your Assigned Learning Paths will be displayed within the **Assigned Learning Paths** portion of the **Home** screen, as shown in the following illustration.



Additionally, you will receive a Notification Email like the example below when you are assigned to a Learning Path.

Biggy1,

You have been assigned to the following Learning Path: **90 Day**.

Please go to your account at <https://trainingprovider.2leap.com/> to access this Learning Path.


Feel free to contact your instructor (Steve Cook) if you have any questions.

Thank you,


Steve Cook (Instructor)

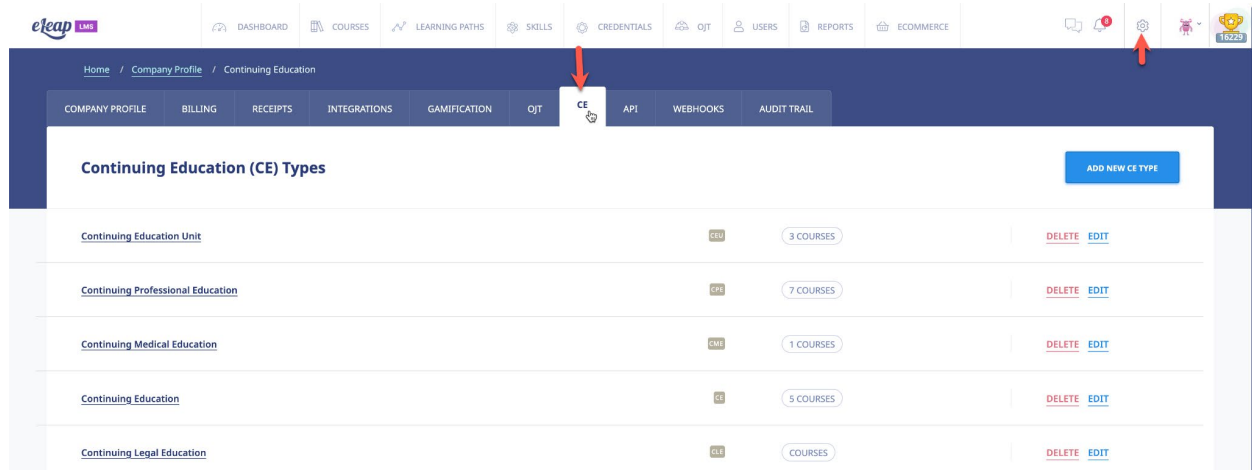
team+training@telaniamail.com

Credentials

Selecting the  **CREDENTIALS** tab in the main menu section displays your Credentials Overview page.

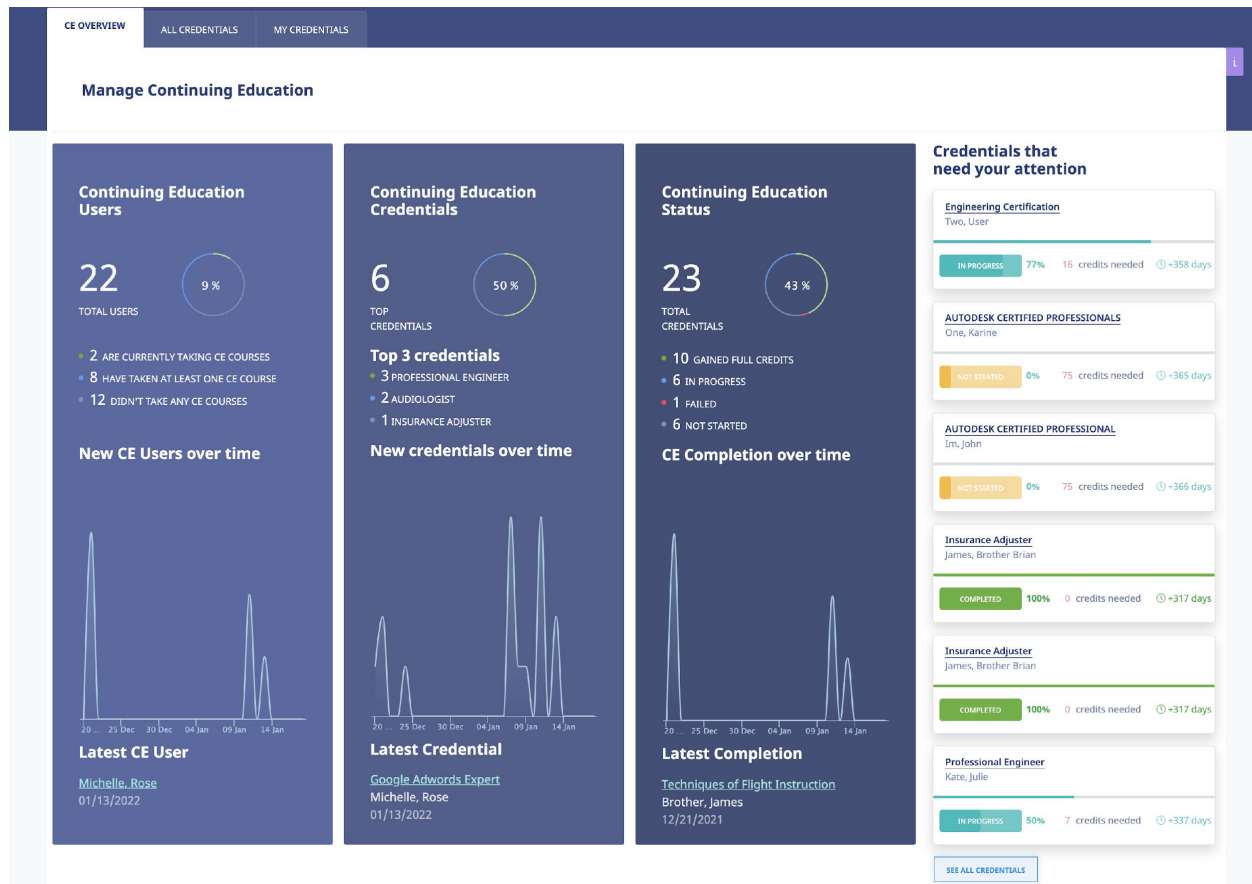
Note that this module might not be available on all accounts. Please [contact eLeaP](#) for more information.

Before activating any courses for CE purposes, make sure the CE Types section of your organization profile page is completed. To go to the CE Types page click the  icon and click the [CE] sub tab as illustrated below:



CE Overview

Clicking CE Reports from Dashboard or selecting the  **CREDENTIALS** tab from the main menu brings you to the CE Overview page.



This page gives you a quick overview into the users taking CE courses or have credentials associated with their profiles. You can also see the types of Credentials your users are tracking including new credentials over time. Lastly this section indicates the CE completions over time.

Any Credentials which still have CE credits outstanding or are not yet completed will be tagged for your attention. You can click the [SEE ALL CREDENTIALS](#) button to see the overall list.

All Credentials 23 CREDENTIALS RENEWALS COMPLETED RENEWALS MISSED RENEWALS EXPIRING SOON [ADD CREDENTIAL](#)

Search by Credential Select User Select Credential Status From - To Select Credential Type [APPLY FILTERS](#) [Clear filters](#)

User	Credential	Organization	Status	Valid From	Valid To	Import Action
Rose, Michelle James	Google Adwords Expert	Google, Inc.	CERTIFICATION	Jan 13, 2022	Jan 13, 2023	IMPORT CERTIFICATION
Rose, Michelle James / Barber	#2002 / Delaware, United States		LICENSE	Jan 13, 2022	Jan 11, 2024	IMPORT CREDITS
Sam, Pete	Autodesk Certified Professional in Revit	Autodesk, Inc.	CERTIFICATION	Jan 11, 2022	Jan 10, 2025	IMPORT CERTIFICATION
User - UG assigned, New	Audiologist	#27-Audio-101 / Arkansas, United States	LICENSE	Jan 11, 2022	Feb 12, 2025	IMPORT CREDITS
Two, User	Engineering Certification	National Engineers, Inc.	CERTIFICATION	Jan 11, 2022	Jan 11, 2023	IMPORT CERTIFICATION

Individual Credential Management (All Credentials)

Click on name and Credential to get individual credential details and manage specific credentials.

Types of Credentials

License:

A license credential is usually a state-specific professional credential that is required to maintain employment or practice. A license is typically verified by a government (state or federal) entity or agency to allow a professional to perform particular occupations or specialties.

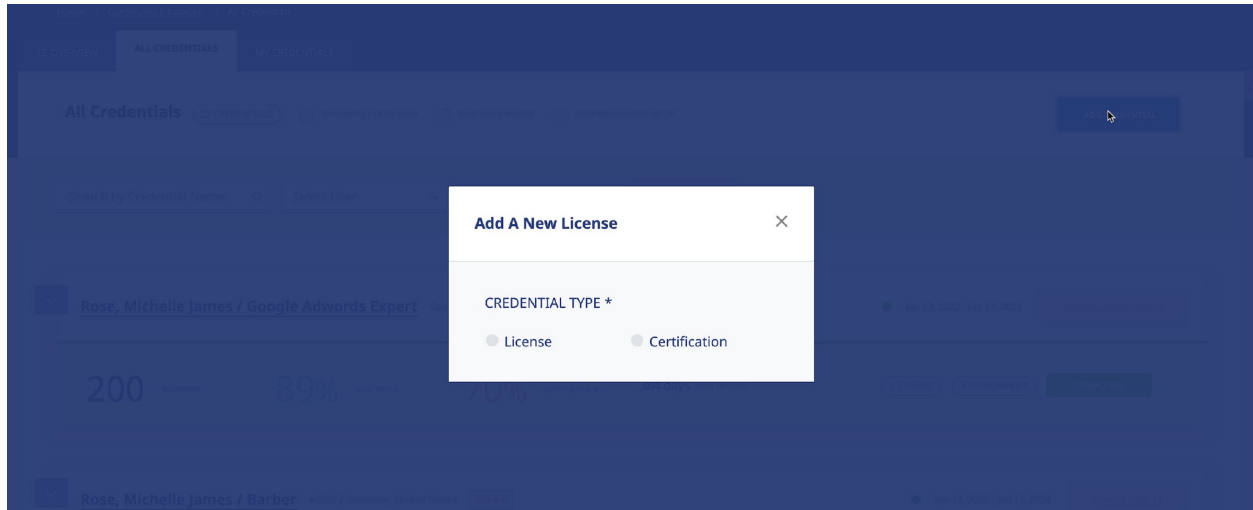
Certification:

A certification proves that a professional has completed certain third-party assessments or tests to be qualified to meet certain criteria or skills to perform a job or role.

In eLeaP, you can track your credentials as well as the credentials of your users via the All Credentials section of the Continuing Education module.

Add a Credential

To add a credential for your users, click the **ADD CREDENTIAL** button and select the type of credential you want to add.



Select the [License] option if you want to add a License type credential or select the [Certification] option if you want to add a Certification.

Add New License

To add a new license, click the **ADD CREDENTIAL** button. Once clicked, select the [License] option and fill out the short form to add the user license.

Some fields in the form marked with * are required.

Add A New License [X]

CREDENTIAL TYPE *

☒ License ☐ Certification

Users *

[Dropdown]

LICENSE * i.e. Auctioneer

[Text Field]

LICENSE NO. * i.e. XX-0000-XX

[Text Field]

COUNTRY *

[United States]

STATE *

[Alabama]

CREDITS NEEDED*

[Text Field]

LICENSE VALID TILL *

[Calendar Icon]

SAVE LICENSE **CANCEL**

Sample form:

Users*: Select the user you want to add a license for. You can use the [Select User Group] option to filter down your user list.

LICENSE *: *The name of your professional license for i.e., Auctioneer*

LICENSE NO.*: *Your license number i.e., XX-0000-XX. If you don't have a license number put NA*

COUNTRY *: *Your country i.e., United States*

STATE *: *Your State or Province i.e., California*

CREDITS NEEDED*: *The number of CE credits needed to fulfill license requirements*

LICENSE VALID TILL *: *When does the license expire. Use the calendar tool to select the license expiration date.*

Import Credits

Once you create your user's license, the next steps are to import credits, or have the user register for self-enrollment credit courses. You can also assign credit courses to the user.

To import Certification information, click the [IMPORT CREDITS](#) button and fill out the short form with the relevant information such as:

- **Continuing Education Provider:** This is the title of the certification course or assessment completed
- **Course Title:** This is the score you (if your own certification) or the user achieved in the assessment.
- **Number of Credits:** This is not required for certifications. If the user earned any CE credits, you can add this here.
- **Credit Type:** This is not required for certifications. If the user earned any CE credits, you can select the type of credit earned.

- **Date of Completion:** This is the date the CE course or program was completed by the user.
- **Certification Validation URL:** Though not required, many only CE providers will provide the user with their earned certification URL. If this is available, post it here.
- **Attachment:** If available, use the [Attachment] tool to upload any earned documents or attachments such as test scores or certificates of completion.

Add New Certification

To add a new Certification, click the **ADD CREDENTIAL** button. Once clicked, select the [Certification] option and fill out the short form to add the user certification.

Add A New Certification ×

CREDENTIAL TYPE *

☐ License ☒ Certification

Users *

CERTIFICATION *

ISSUER *

PASSING SCORE *

NUMBER OF QUESTIONS

INDUSTRY

CERTIFICATION VALID TILL *

SAVE CERTIFICATION **CANCEL**

Some fields in the form marked with * are required.

Sample form:

Users*: Select the user you want to add a license for. You can use the [Select User Group] option to filter down your user list.

CERTIFICATION *: *The name of your professional certification for i.e., Adobe Certified Professional*

ISSUER*: *Third-party organization which assessed and issued the certification i.e., Google, Inc, Adobe*

PASSING SCORE *: *The passing score criteria for the third-party assessment.*

NUMBER OF QUESTIONS: *If available, add total number of questions in the third-party assessment.*

INDUSTRY: *If available, the applicable industry for the certification.*

CERTIFICATION VALID TILL *: *When does the certification expire. Use the calendar tool to select the license expiration date.*

Import Certification

Once you create your user's certification, the next steps are to import the certification information or have the user import their own certification credit. To import Certification information, click the

IMPORT CERTIFICATION

button and fill out the short form with the relevant information such as:

- **Certification Title:** This is the title of the certification course or assessment completed
- **Your Score:** This is the score you (if your own certification) or the user achieved in the assessment.
- **Number of Credits:** This is not required for certifications. If the user earned any CE credits, you can add this here.
- **Credit Type:** This is not required for certifications. If the user earned any CE credits, you can select the type of credit earned.
- **Date of Completion:** This is the date the third-party assessment was completed by the user.
- **Certification Validation URL:** Though not required, many only certification providers will provide the user with their earned certification URL. If this is available, post it here.
- **Attachment:** If available, use the [Attachment] tool to upload any earned documents or attachments, such as test scores or certificates of completion.

Manage Existing Credentials – All Credentials

Quick Charts

Use the quick charts on this page to easily access different credential statuses. Click on the [Renewals Completed] to see all completed credentials. The [Renewals Missed] is able to let you see which CE credentials were not completed before their valid date expired. Click the [Renewals Expire Soon] to drill down to a heads-up list of credentials that are coming up for renewal in the next 60 days.

All Credentials

23 CREDENTIALS



RENEWALS COMPLETED



RENEWALS MISSED



RENEWALS EXPIRE SOON

Filtering Options

Use the various filtering options to select and manage different types or credentials. You can search for credentials by User name or Credential name or you can select the type of credential. You can also filter by Credential Status.

Search by Credential Name



Select User



Select Credential Status

Select Credential Type



APPLY FILTERS

Managing Individual User Credentials


To manage existing user credentials, including importing credits, click on the name of the credential you

want to manage.

Managing License Credentials

The screenshot shows the 'License Credentials' page for user 'Cranston, Kofi / Professional Engineer'. The header includes the user's name, license number '#22028393-NA / Colorado, United States', a progress bar at '14 % IN PROGRESS', and the validity period 'Dec 24, 2021 - Dec 24, 2022'. Below the header, there are four credit status indicators: '14 credits required' (blue), '2 credits completed' (green), '0 credits in progress' (yellow), and '12 credits needed' (red). A clock icon indicates '364 days until renewal'. The main content area has three tabs: 'Credits' (selected), 'Attachments', and 'History'. Under the 'Credits' tab, there is a 'Credits' section with a blue button labeled 'IMPORT MORE CREDITS'. Below this, there is a '2-Hr. Engineering Basics' course entry with a progress bar at '100% COMPLETED', a 'CERTIFICATE' link, and a '2' icon. A red arrow points up to the 'EDIT LICENSE' link in the top right corner, and another red arrow points down to the 'IMPORT MORE CREDITS' button.

To manage your user License credentials, click on the name of the User/License. You can edit the existing license to change the license data, or you can use the **IMPORT MORE CREDITS** button to add credits to this user's license.

Should you want to add additional documents to the user license, click the [Attachments] tab to upload documents and files. Click the  icon to delete the attachment file. To download the attachment, click the [Download] link.

The [History] tab allows you to see a history or log of uploads and deletions of attachments.


Note: A grayed-out **IMPORT MORE CREDITS** button means the license has enough credits for completion of the license, and no additional credits are needed.

Managing Certification Credentials


The screenshot shows the 'Certification Credentials' page for user 'One, Karine / AUTODESK CERTIFIED PROFESSIONALS'. The header includes the user's name, company 'Adobe', a status 'NOT STARTED', and the validity period 'Jan 09, 2022 - Jan 18, 2023'. Below the header, there are three score indicators: '60 questions' (blue), '75% passing score' (green), and '0% your score' (yellow). The main content area has three tabs: 'Certification' (selected), 'Attachments', and 'History'. Under the 'Certification' tab, there is a 'Requirements' section with a blue button labeled 'IMPORT MORE CREDITS/CERTIFICATION'. A red arrow points up to the 'EDIT CERTIFICATION' link in the top right corner, and another red arrow points down to the 'IMPORT MORE CREDITS/CERTIFICATION' button.

To manage your user Certification credentials, click on the name of the User/Certification. You can edit the existing certification to change the certification data, or you can use the **IMPORT MORE CREDITS/CERTIFICATION** button.

button to add certification validation information to this user's certification credential.

Should you want to add additional documents to the user certification, click the [Attachments] tab to upload documents and files. Click the  icon to delete the attachment file. To download the attachment, click the [Download] link.


The [History] tab allows you to see a history or log of uploads and deletions of attachments.

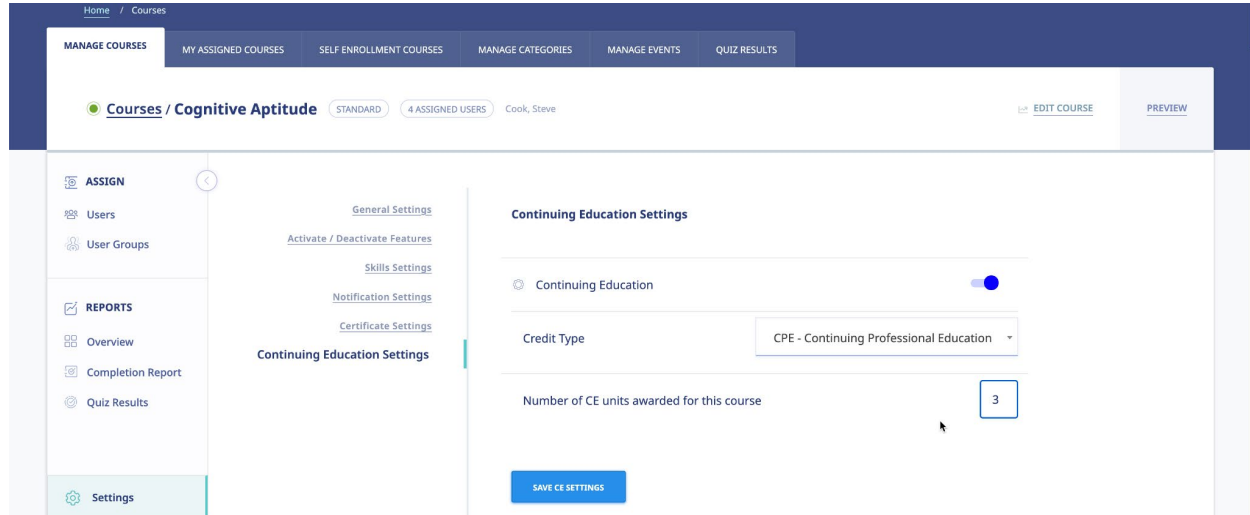
Note: A grayed-out  button means the certification has achieved the minimum passing score for completion of the certification, and no additional credits are needed.

Internal CE Course

If the license credit is earned from an internal course (either assigned or self-enrolled), you will be able to get more details by clicking the course name. This will get you to the course stats page.

Activating CE for Courses

To activate CE credits for your courses, go to the  **Settings** of the course and click the [Continuing Education Settings](#).



Next, switch on the [Continuing Education] toggle and select the credit type as well as the number of credit units users will earn upon successful course completion.

“Although individual professions may have different standards, the most widely accepted standard, developed by the International Association for Continuing Education & Training, is

that ten contact hours equals one Continuing Education Unit.[8] Not all professionals use the CEU convention. For example, the American Psychological Association accredits sponsors of continuing education such as PsychContinuingEd.com and uses simply a CE approach. In contrast to the CEU, the CE credit is typically one CE credit for each hour of contact.” -

https://en.wikipedia.org/wiki/Continuing_education

If you want us to send renewal email reminders, switch that option on. Don't forget to save your CE settings to finalize this step.

Courses that have credits are displayed both in the course information as well as in the course listing page.

Courses / How to get started STANDARD 9 ASSIGNED USERS 3 CPE Cook, Steve

Manage Courses 391 TOTAL COURSES (1 TO 26 SHOWN) ADD NEW COURSE

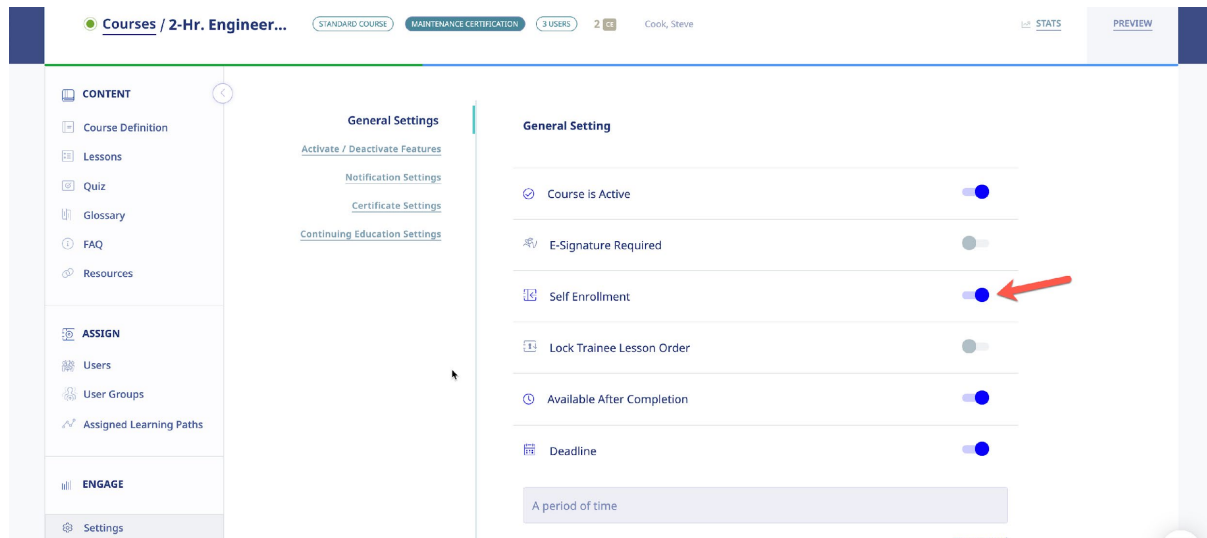
Search for a course by name Filter courses by categories Course Type Show Only APPLY FILTERS

COURSE NAME/INSTRUCTOR	CREDITS	CATEGORY	# OF USERS	PROGRESS	DATE CREATED	ACTIVE
2-Hr. Engineering Basics Cook, Steve	2 CPE	MAINTENANCE CERTIFIC...	1 USERS	100%	12/24/2021	ON
12-Hr. Engineering Essentials Cook, Steve	7 CPE	MAINTENANCE CERTIFIC...	9 USERS	100%	12/24/2021	ON
Course 5749 G, Arman		UNCATEGORIZED	7 USERS	100%	12/23/2021	ON
7-Hr. Audiologist Cook, Steve	7 CPE	HR	1 USERS	100%	12/23/2021	ON

Self-Enrollment CE Courses

You can set up Self Enrollment courses for users to sign up for. This is an easy way to ensure your users can search for CE courses for their licenses. This also removes added responsibility on admins to assign every single last CE course to ensure their users have the credits needed to fulfil their license requirements.

To set up Self Enrollment CE Courses, first create your course as illustrated above. Then use the course **Settings** to activate the Self Enrollment option for the course.

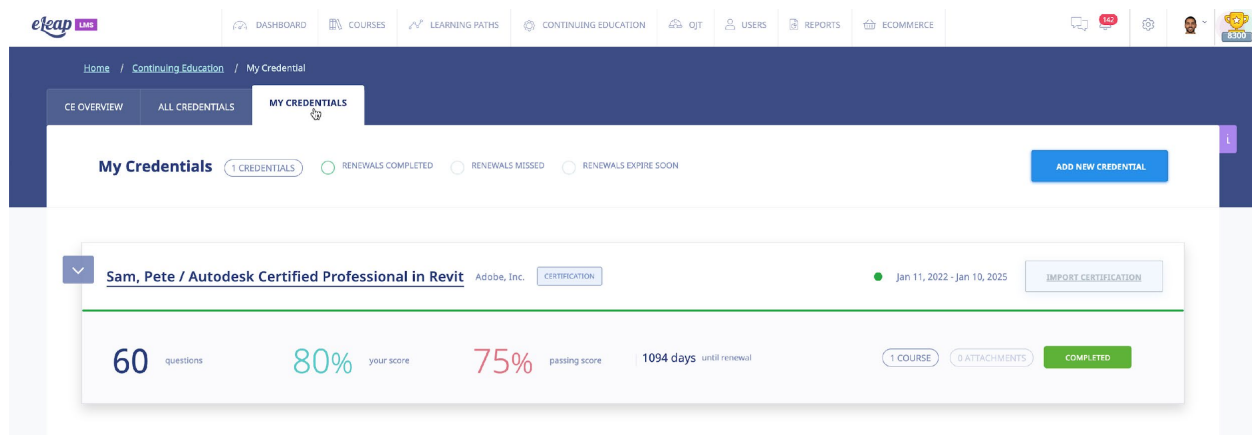


If you want to restrict access to your Self Enrollment course, use the restriction options available in the Settings section:

- Self-Enrollment restriction:
 - a. **All Users:** Any user in your account can self-enroll in this course.
 - b. **Specific User Groups:** Only users in selected user groups can self-enroll in this course.

My Credentials

As a user in eLeaP, you can maintain your own professional credentials for your career. From your [Continuing Education] menu, click the **MY CREDENTIALS** sub tab to manage your own credentials.



Add New Credential

To add a new credential, see the [\[Add New Credential\]](#) section.

Starting CE Course

You can be assigned to a CE course, or you can self-enroll in one. Regardless of how you are assigned, here's how to start a new CE course.

Self Enrollment CE course:

If you offer CE courses in eLeaP, you or your users can self-enroll in CE courses if you have created such courses.

The screenshot shows the eLeaP user interface. At the top, there is a navigation bar with links to DASHBOARD, COURSES, LEARNING PATHS, OJT, MY CREDENTIALS, and MY ACTIVITY. The user is logged in as 'Architect' with a license ID of C 162982, located in California, United States. The license status is 'NOT STARTED' and it expires on Jan 17, 2022 - Jan 17, 2023. The page shows 18 credits required, 0 credits completed, 0 credits in progress, and 18 credits needed. A timer indicates 364 days until renewal. Below this, there are tabs for Credits, Attachments, and History. The 'Credits' tab is active, showing a message: 'You need 18 more credits for the license renewal. Click here to find more courses or import more credits.' A red arrow points to the link in this message. There is also a button labeled 'IMPORT MORE CREDITS'.

To find CE courses, click the link as shown below or go to the **SELF ENROLLMENT COURSES** section.

[Home](#) / [Courses](#) / [Self Enrollment Courses](#)

MANAGE COURSES

MY ASSIGNED COURSES

SELF ENROLLMENT COURSES

MANAGE CATEGORIES

MANAGE EVENTS

QUIZ RESULTS

Self Enrollment Courses

Search for a course by name

Search by Keyword

Filter courses by categories

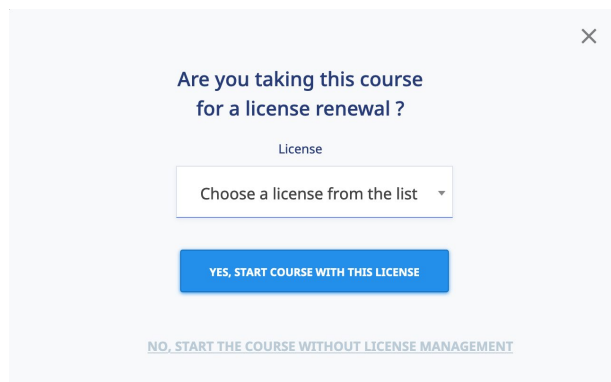
APPLY FILTERS

NO.	NAME/INSTRUCTOR	DESCRIPTION	STATUS	CATEGORY	ENROLLED
1.	2-Hr. Engineering Basics Cook, Steve		0% NOT STARTED	Maintenance Certification	ENROLL
2.	12-Hr. Engineering Essentials Cook, Steve		0% NOT STARTED	Maintenance Certification	ENROLL
3.	7-Hr. Audiologist Cook, Steve		0% IN PROGRESS	HR	ENROLL
4.	Cyber Security For Employees Cook, Steve	Most cyber breaches occur by way of naive employees. This training focuses on how to...	10% IN PROGRESS	KE Library	✓ Yes

Once you self-enroll in a CE course or have a CE course assigned to you, you must follow a strict sequence to earn CE credits for completing the course.

Step 1:

Associate the CE course with one of your existing licenses (or create a new license)



Are you taking this course for a license renewal?

License

Choose a license from the list

YES, START COURSE WITH THIS LICENSE

[NO, START THE COURSE WITHOUT LICENSE MANAGEMENT](#)

Step 2:

Once you make your associated license selection, click the [Yes, start course with this license]

Are you taking this course for a license renewal ?

License

Professional Engineer

YES, START COURSE WITH THIS LICENSE

NO, START THE COURSE WITHOUT LICENSE MANAGEMENT

Note:

If you don't want to take the course for CE credit, select the [No, Start the course without License Management]

Are you taking this course for a license renewal ?

License

Professional Engineer


YES, START COURSE WITH THIS LICENSE


NO, START THE COURSE WITHOUT LICENSE MANAGEMENT

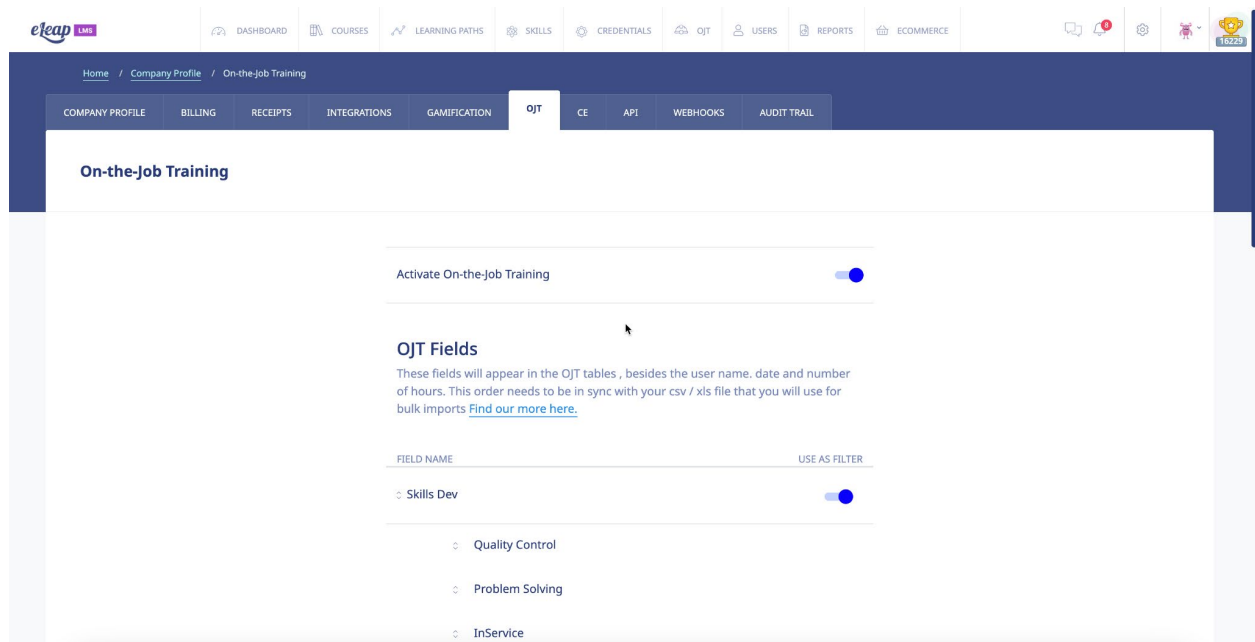
Once you Start and complete your course, you will earn the course CE's allocated.

My Licenses / Professional Engineer #9922-ANA / Indiana, United States 50 % IN PROGRESS Dec 23, 2021 - Dec 23, 2022 EDIT LICENSE				
17 credits required	9 credits completed	0 credits in progress	8 credits needed	364 days until renewal
Credits	Attachments	History		
Credits				IMPORT MORE CREDITS
2-Hr. Engineering Basics eLeaP CE	100% COMPLETED	CERTIFICATE	2	
12-Hr. Engineering Essentials eLeaP CE	100% COMPLETED	CERTIFICATE	7	

OJT – On-the-Job-Training

Selecting the  OJT tab in the main menu section displays your OJT section of eLeaP system. Note that this module is not automatically available in your main menu section. If you don't see the OJT tab, you will need to activate it from your account page. Also feel free to [contact eLeaP](#) for more information.

To go the OJT Activation page, click the  icon and click the [OJT] sub tab as illustrated below:



OJT Fields

You can edit the existing default fields like Skill and Task. However, the Date and Hours fields are not editable and are required for the OJT to work properly.

Add New OJT Field:

Go to the last line in the OJT form and enter the name of your new field

ADD NEW FIELD

. Click the [Add New Field] button to add your new field.

If you want to add a drop-down field selector, no worries, first enter the top-level field and then edit the field to add the drop-down options.

Edit OJT Field:

Hover over the OJT field edit icon to bring up the dropdown menu.

Activate On-the-Job Training ☐

OJT Fields

These fields will appear in the OJT tables, besides the user name, date and number of hours. This order needs to be in sync with your csv / xls file that you will use for bulk imports [Find our more here.](#)

FIELD NAME	USE AS FILTER
<div><div>▼</div><div>Skill</div></div>	<input checked="" type="checkbox"/>
<div><div>○</div><div>Task</div></div>	<input checked="" type="checkbox"/>
<div><div>○</div><div>Date</div></div>	<input checked="" type="checkbox"/>
<div><div>○</div><div>Hours</div></div>	<input type="checkbox"/>

Hover over edit icon to bring up the dropdown menu

OJT Fields - Edit

Field Name

Skill

Field Type

Text

Text

Dropdown

Once the dropdown menu appears select the **Edit Field** option to edit the selected field. OJT fields can be text input fields or dropdown selection option fields. Select the right type of field for your needs.

Field Name: Enter the value for the field i.e., Competency

Field Type: Select the field type option that best meets your needs. Text fields enable the

user to input their own text response while Dropdown fields enable the user to select from a pre-defined list of answer options i.e., 'Is this a core level procedure?' and the answer options are 'Yes' or 'No'.

Adding Dropdown Field Options:

After saving a field as a dropdown type, click field option icon to see the add dropdown option

FIELD NAME	USE AS FILTER
<div><div>Core level procedure?</div><div><div>Add Dropdown Options</div><div>Task</div><div>Edit Field</div></div></div>	<input checked="" type="checkbox"/>

Repeat this process to add additional dropdown options.

Use as Filter

When the 'Use as Filter' switch is turned on, eLeaP displays the OJT in your OJT section as one of the fields you can filter records by.

FIELD NAME	USE AS FILTER
<div>Core level procedure?</div> <div><div>Yes</div><div>No</div></div>	<input checked="" type="checkbox"/>

Due to space restrictions, we recommend checking how the filter page looks, as too many fields might look too busy.

eLeaP LMS

DASHBOARD

COURSES

LEARNING PATHS

SKILLS

CREDENTIALS

OJT

USERS

REPORTS

ECOMMERCE

Home / On-the-job Training

On-the-job Training 9 OJT HOURS

DOWNLOAD AS XLS

MANUAL ADD

BULK IMPORT

Search by Name or Email

Select Skills Dev

Select Audit

From - To

Select Hours

Select Model Number

Select Specialty

APPLY FILTERS

CLEAR

USER	SKILLS DEV	AUDIT	DATE	HOURS	MODEL NUMBER	SPECIALTY	DATE CRE
Scott, Corine	Problem Solving	Assembly	09/01/2022	0:45 h	NAS12		09/30/202
Scott, Corine	Quality Control	Assembly	09/02/2022	0:15 h	88283AND		09/14/202
Scott, Corine	Quality Control	Assembly	08/30/2022	0:10 h	88283AND		09/01/202
C, Sophie	Quality Control	Assembly	03/31/2023	0:1 h	88283AND		04/03/202

Versus

USER	SKILLS DEV	AUDIT	DATE	HOURS	MODEL NUMBER	SPECIALTY	DATE CRE
Scott, Corine	Problem Solving	Assembly	09/01/2022	0:45 h	NAS12		09/30/202
Scott, Corine	Quality Control	Assembly	09/02/2022	0:15 h	88283AND		09/14/202
Scott, Corine	Quality Control	Assembly	08/30/2022	0:10 h	88283AND		09/01/202
C. Sophie	Quality Control	Assembly	03/31/2023	0:1 h	88283AND		04/03/202

OJT Section

Click the OJT tab to go to the main OJT page. From this page, you manage your OJT records. The OJT page enables Admins and Instructors to add OJT records one at a time or in bulk, edit existing records, download all OJT records, filter OJT records using specific fields, or view individual user OJT records.

Manual Add

Use the [MANUAL ADD](#) option to add OJT records for specific users. Here are the steps to add a manual OJT record:

1. Select the specific user you want to add the records for.
2. Select the answer options for the various OJT fields, including text and dropdown input options.
3. Select the date the OJT record took place.
4. Input the time the OJT record took to complete. You can use minutes or hours for the Hours field.
5. Add any additional OJT input values and click [SAVE RECORD](#) to save the new OJT record.
6. Note that if you want to add a file or upload a document, use the [TO ADD FILE, CHOOSE FILE](#) option.

If you need to edit an existing OJT record, simply scroll horizontally to the right, and click the [EDIT](#) option to bring up the OJT record form. You can also delete an existing OJT record by clicking the icon. As with any deletion in the system, the deletion is permanent.

Bulk Import

If you have many OJT records you would rather upload at once, the Bulk Import tool is the way to do this. Click the **BULK IMPORT** button to start the process. Before uploading or importing your file, though, you want to do a bit of prep work:

1. First make sure your OJT fields are set up the way you want. Check your OJT settings page to make sure everything looks ok.
2. Then, download the bulk import template file by clicking the [DOWNLOAD EXAMPLE XLS FILE](#) link. The bulk_ojt.xls file is designed with your OJT fields already available

	A	B	C	D	E	F	G	H	I	J
1	Full Name	Description	Email	Qualifications	Task	Date	Hours	Model Number	Specialty	
2										
3										
4										
5										
6										

3. Add data to the bulk_ojt.xls and make sure to maintain the email address as it is the verification field the system relies on to properly perform the import. A completed file might look something like

Full Name	Description	Email	Qualifications	Task	Date	Hours	Model Number	Specialty
Bolton, James	Bloodborne Pathogens	don+reguser3@telaniamail.com	Training	Assembly	12/2/21	1	TENAT-82	Sales
Walker, Alice		eleaptraining+ja@gmail.com	Quality Control	Assembly	3/15/21	2	NASS12	Ops
Jones, Helen		team+orina@telaniamail.com	Problem Solving	Legal Testing	4/3/21	3	NASS123	Culture
Mercer, Cardiff		captureleave@gmail.com	Problem Solving	Legal Testing	11/1/21	4	YAH729	Culture
Mercer, Cardiff		captureleave@gmail.com	Problem Solving	Legal Testing	9/8/21	5	778NAH	Sales
C, Sophie		ant@studio78.ro	InService	Assembly	11/17/21	6	52NA71	HR
Brazil, John		don+snow@eleapsoftware.com	Quality Control	Assembly	11/9/21	7	1WSR1US	Engineering

4. Once everything looks good to go, click [CHOOSE FILE] to select your import file for the upload process. You are ready to click the [Start Import] to import your bulk file.

Select csv or xls file *

The columns format from your file needs to be in sync with the fields you set up in the [OJT settings page](#)

[DOWNLOAD EXAMPLE XLS FILE](#)

BULK_OJT-NEW.XLS...

START IMPORT

CANCEL

5. After a successful import, you will receive a confirmation message on screen.

Home / On-the-Job Training

On-the-Job Training 183 OJT HOURS

DOWNLOAD AS XLS | MANUAL ADD | BULK IMPORT

The bulk import was successful. Review data below

Search by Name or Email Select Qualifications Select Task From - To Select Hours APPLY FILTERS Clear filters

USER	QUALIFICATIONS	TASK	DATE	HOURS	MODEL NUMBER	SPECIALTY
Bolton, James	Training	Assembly	11/02/2021	3 h	88283AND	
Brazil, John	Quality Control	Assembly	11/08/2021	7 h	1WSR1US	Engineering
C, Sophie	InService	Assembly	11/16/2021	6 h	52NA71	HR

6. You can verify that your import was successful by clicking on any of the newly imported records. The individual user's OJT record would look like this

Home / On-the-Job Training / Bolton, James / View OJT activity

Bolton, James / On-the-Job Training 9.84 OJT HOURS

MANUAL ADD

9.84
TOTAL OJT HOURS


By Qualifications: 4 TRAINING, 5.84 MAINTENANCE

By Task: 4 ASSEMBLY, 5.84 CAMERA ASSEMBLY

Select Qualifications Select Task From - To Select Hours APPLY FILTERS Clear filters

QUALIFICATIONS	TASK	DATE	HOURS	MODEL NUMBER	SPECIALTY	DATE CREATED	ACT
Training	Assembly	12/01/2021	1 h	TENAT-82	Sales	12/27/2021	EDIT
Training	Assembly	11/02/2021	3 h	88283AND		11/05/2021	EDIT
Maintenance	Camera Assembly	03/08/2021	5.84 h	IPH022-SA1	REPAIR	03/08/2021	EDIT

Users

Selecting the  **USERS** tab on the main menu bar displays the **Users** screen, illustrated below. Each user created is displayed on the **Users** list, with their **Name**, **Level**, **Email**, **Description** and **Date Created**

details shown. You are also given the capability of setting a User's **Status** as **Active** or **Inactive**. Users can be added to the system manually, or imported from your computer, and you can export **User Activity** details from the system to a local drive on your computer.

The screenshot shows the 'Users' page in the eLeaP LMS. The top navigation bar includes links for Dashboard, Courses, Learning Paths, Skills, Credentials, OJT, Users, Reports, and Ecommerce. The 'Users' section is active, showing a list of 96 total users. Below the header, there are filters for 'Search by Name or Email', 'Select Level', 'Select User Group', and 'Is Active?'. A table of users is displayed with columns: NO., NAME, DESCRIPTION, LOCATION, EMPLOYEE ID, SHIFT, DATE CREATED, and ACTIVE. The table lists four users: Acker, Bill (Instructor), Alpha, Br... (Trainee), Apla, Kilo (Trainee), and Baker, Bill (Manager). Each user has a checkbox and a toggle switch for their status.

NO.	NAME	DESCRIPTION	LOCATION	EMPLOYEE ID	SHIFT	DATE CREATED	ACTIVE
1.	Acker, Bill don+ba@telaniamail.com				Third	06/04/2021	<input checked="" type="checkbox"/>
2.	Alpha, Br... alpha@telaniaskype3telaniamail.onmic rosoft.com	Class of Always Learning	Denver	100190 - ABSIP - 992z12		01/29/2020	<input checked="" type="checkbox"/>
3.	Apla, Kilo don+alpha@telaniamail.com					02/22/2022	<input checked="" type="checkbox"/>
4.	Baker, Bill newusrv5@telaniamail.com		Louisville			12/17/2018	<input checked="" type="checkbox"/>

You can filter which Users are displayed on the **Users** list by selecting a Level from the **Levels** list, selecting a User Group from the **User Group** list, and or selecting either **Active** or **Inactive** from the **Is Active?** list, and then clicking **APPLY FILTERS**.

Adding a New User

Clicking the **ADD NEW USER** button on the **Users** screen allows you to add additional Users to the system. As shown in the following illustration, the **Add User** dialog is displayed. Use the steps below to successfully add a new User.

1. Select a title for the new User by making a selection from the **Title** list. Available options are Mr., Mrs., Ms.
2. Enter the new User's first name in the **First Name** field.
3. Enter the new User's middle name, if applicable, in the **Middle Name** field.
4. Enter the new User's last name in the **Last Name** field.
5. Enter the new User's email address in the **Email** field.
6. Select the new User's access level by making a selection from the **Access Level** list. Available options are Trainee, Supervisor, Manager, and Instructor.
7. Enter a description for the new User, if desired, within the **Description** field.
8. If you have set up **Custom Fields** for your account (see [Custom Fields section](#)), enter values for these fields for the new User.
9. Click **ADD USER** to add the new User to the system.

The new User will be added to the **Users** list on the **Users** screen. Additionally, a welcome email is generated from office@eleapsoftware.com to your new user. This welcome email will contain information for the new user to log into your training website. Please be sure to white list email

coming from ELEAPSOFTWARE.COM as vital information can be blocked or dumped in your bulk or SPAM folder.

Note: You can create as many instructors, managers, supervisors, and/or trainee accounts as you like. Just be sure to assign the relevant Access Level to users when you create their accounts. Remember, you can also edit user accounts later and change their Access Level settings.

Trainee Users

Trainee users are set up to be assigned to courses or learning paths. Trainees can also self-enroll in designated courses and learning paths. Depending on course requirements, trainees might be required to complete quizzes, feedback forms, or participate in discussions.

If activated, trainees can also access continuing education tracking as well as on-the-job training options within the LMS.

Instructor Users

The INSTRUCTOR level is a secondary level whose functionality is very similar to that of an Administrator.

INSTRUCTORS are, however, unable to access the COMPANY PROFILE menu or user group and course information that they themselves have not created or been granted access to by an Administrator.

INSTRUCTORS do have the ability to create additional users, including additional INSTRUCTORS. They can also manage their own quizzes and courses in every detail.

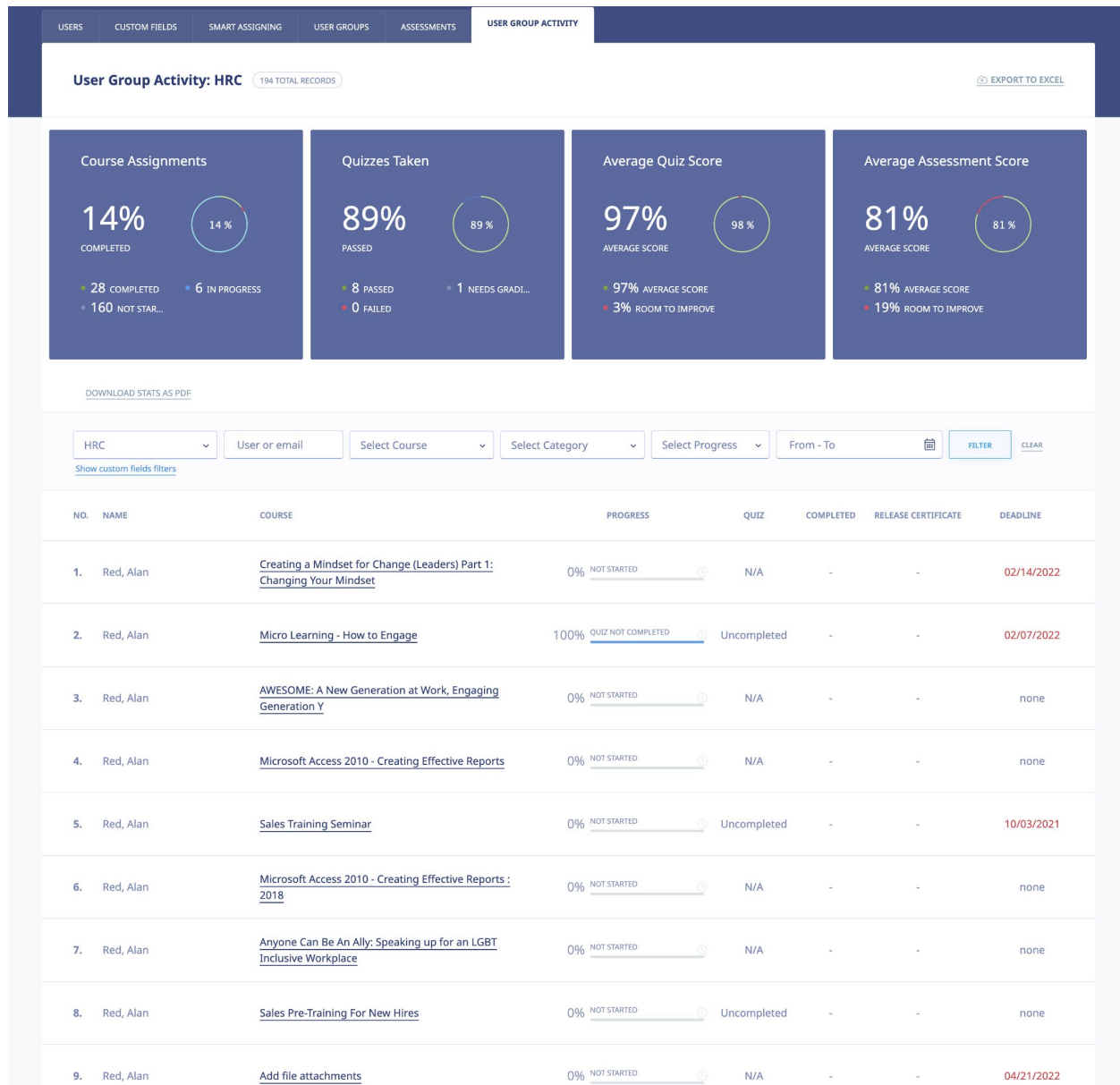
For course collaboration, multiple INSTRUCTORS can be added to a single course.

Supervisor Users

The Supervisor account level enables organizations to provide management oversight for User Groups and teams. When a Supervisor is created and associated with a User Group, they are able to access completion reports for members of that User Group.

To access the User Groups they manage, Supervisors will need to click on [USER GROUPS] from the main top navigation area. The Supervisor can then click on any listed User Groups to view completion and tracking reports for members of that User Group.

Supervisors can download completion reports into Excel documents. They will also receive notifications via email when course deadlines for managed Users and User Groups are expiring or have expired.



Manager Users

The Manager account level enables organizations to provide management oversight for User Groups and teams. When a Manager is created and associated with a User Group, they are able to assign courses and learning paths to members of their managed user groups. Managers are also able to access completion reports for members of that User Group.

To access the User Groups they manage, Managers will need to click on [USER GROUPS] from the main

top navigation area. The Manager can then click on any listed User Groups to view completion and tracking reports for members of that User Group.

Managers can download completion reports into Excel documents. They will also receive notifications via email when course deadlines for managed Users and User Groups are expiring or have expired.

Assigning Managers/Supervisors to User Groups

First go to the [Users] tab and click the [User Group] sub tab. From there, select the user group you want to manage. You can create a new user group if needed.

You will see the new tab [User Group Settings]

The screenshot shows the eLeaP software interface. At the top, there is a navigation bar with tabs: DASHBOARD, COURSES, LEARNING PATHS, SKILLS, CREDENTIALS, COT, **USERS**, REPORTS, and ECOMMERCE. Below this, a sub-navigation bar shows: Home / User Groups / View User Group. The main content area has a header for 'Green Lantern' with '9 MEMBERS'. Below the header is a table with the following data:

NAME	Green Lantern
DESCRIPTION	
ACTIVE	YES
CREATOR	Acker, Bill
CREATED ON	03/21/2022

Below the table, there is a section titled 'Import Users' with the following text: 'To import Users into this User Group, [CLICK HERE](#) to download our easy to use template (Excel format). Complete and save this template, then click **upload batch file** to Import your users. Your Users will immediately be sent their login information via email. Please make sure they have whitelisted office@eleapsoftware.com'. There is a link 'UPLOAD BATCH FILE' below this text. At the bottom of the page, there is a 'Members' section with two buttons: 'EXPORT USER LIST' and 'ADD NEW MEMBERS'. An orange arrow points to the 'USER GROUP SETTINGS' tab in the sub-navigation bar.

Click on that see the option to [Add New Role]

Home / User Groups / Green Lantern / Settings

USERS CUSTOM FIELDS SMART ASSIGNING MANAGE USER GROUP **USER GROUP SETTINGS** ASSESSMENTS USER GROUP ACTIVITY

User Group Settings / Green Lantern ADD NEW ROLE

NO.	<input type="checkbox"/>	NAME	LEVEL	EMAIL	DESCRIPTION	MEMBER FROM
1.	<input type="checkbox"/>	<u>Baker, Bill</u>	Manager	newusrv5@telaniamail.com		03/22/2022

Total Members: 1
[BACK TO USER GROUPS](#)

User Activity

Clicking on the name of a user takes you to the user's activity page. This section includes sub sections like **Courses Created** (if applicable), **Courses** (assigned), **Quizzes**, **SCORM** (quizzes), **Certificates**, **E-Signatures**, **Learning Paths**, **Skills**, **Credentials**, **Assessments**, **Notes**, **OJT**, **Events** and **User Groups**

eLeaP LM

DASHBOARD COURSES LEARNING PATHS SKILLS CREDENTIALS OJT **USERS** REPORTS ECOMMERCE

Home / Users / User List

USERS CUSTOM FIELDS SMART ASSIGNING USER GROUPS ASSESSMENTS USER GROUP ACTIVITY

Users 4 TOTAL USERS EXPORT USER ACTIVITY BULK IMPORT ADD NEW USER

[Show custom fields filters](#)

NO.	<input type="checkbox"/>	NAME	DESCRIPTION	LOCATION	EMPLOYEE ID	SHIFT	DATE CREATED	ACTIVE
1.	<input type="checkbox"/>	<u>Jones, ...</u> <small>TRAINEE</small> don+snow773@eleapsoftware.com					08/13/2019	<input checked="" type="checkbox"/>
2.	<input type="checkbox"/>	<u>Scott, C...</u> <small>TRAINEE</small> don+snow@eleapsoftware.com					09/28/2017	<input checked="" type="checkbox"/>
3.	<input type="checkbox"/>	<u>Tester...</u> <small>TRAINEE</small> don+snow1@eleapsoftware.com					02/22/2019	<input checked="" type="checkbox"/>
4.	<input type="checkbox"/>	<u>Vonn, K...</u> <small>TRAINEE</small> don+snow334@eleapsoftware.com					03/20/2019	<input checked="" type="checkbox"/>

← Corine Scott - User Activity 8796 Last Login: 04/06/2023 DOWNLOAD USER ACTIVITY

User Profile Courses Quizzes SCORM Certificates E-Signatures Learning Paths Skills Credentials Assessments Notes OJT Events Groups

From - To Search by Course Name Course Category FILTER CLEAR

99 Courses 31 NOT STARTED 14 IN PROGRESS 54 COMPLETED 19 OVERDUE 0 AT RISK

NO.	COURSE	STATUS	DEADLINE	QUIZ	COMPLETED	ASSIGNED
1.	12-Hr. Engineering Essentials Cook, Steve	COMPLETED 100%	09/18/2022	PASSED	08/18/2022	08/18/2022
2.	2-Hr. Engineering Basics Cook, Steve	QUIZ NOT COMPLETED 100%	04/02/2023	Uncompleted	-	03/02/2023
3.	5-Hr. Engineering Basics Cook, Steve	NOT STARTED 0%	TBA	Uncompleted	-	04/11/2023

User Activity Sub Sections

Click the individual sub sections to get additional information on the user's activity.

User Profile Courses Quizzes SCORM Certificates E-Signatures Learning Paths Skills Credentials Assessments Notes OJT Events Groups

Download User Activity

Clicking the **Download User Activity** link allows you to download this information to your computer as an Excel file.

User Profile

Selecting the [User Profile](#) tab displays the **View profile** screen for the currently selected User, as shown in the following illustration. In addition to the options described within the [Editing Your Profile Fields](#) section of the document, you can add **Notes**, and upload a File to attach to those Notes for the User, set a new **Password** for the User, and resend **Email Confirmation** for the User. You can also delete the picture associated with the Profile, replace that picture with another, or edit the **User Profile** fields.

USERS

CUSTOM FIELDS

SMART ASSIGNING

USER GROUPS

ASSESSMENTS

USER GROUP ACTIVITY

Users / Cristos Anisti

875

SET NEW PASSWORD

RESEND EMAIL CONFIRMATION

User Profile

User Activity

EDIT USER

Title

First Name

Cristos

Middle Name

Last Name

Anisti

Email

don+christos@telaniamail.com

Description

1st Class

Access Level

TRAINEE

Active

YES

Organization

PSM

Course Number

ED 332

Date Created

06/12/2017

Notes for Cristos Anisti

Click to add file [CHOOSE FILE](#)

Make notes/documents visible to the user

☐

ADD NOTE

09/18/2017

EDIT

DELETE

Add note for Cristos

Leverage Your L...

58.64 KB

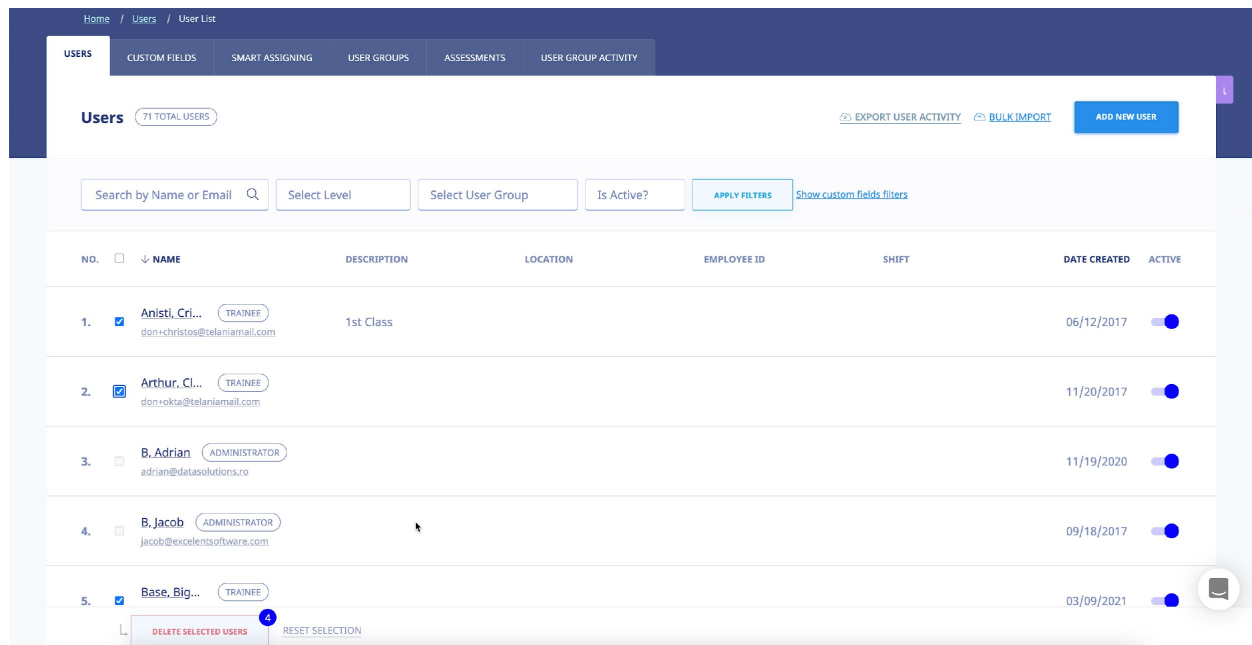
DOWNLOAD

a product of

telania

Deleting Users

Selecting the check box for a User on the **Users** list, and then clicking **REMOVE SELECTED USERS** allows you to remove that User from the system, as shown in the following illustration.



Before performing the deletion, a warning message is displayed to ensure that is your intention, as shown in the illustration below. Click **OK** to proceed with the deletion, or click **Cancel** to cancel the deletion process

loveyourlms.2leap.com says

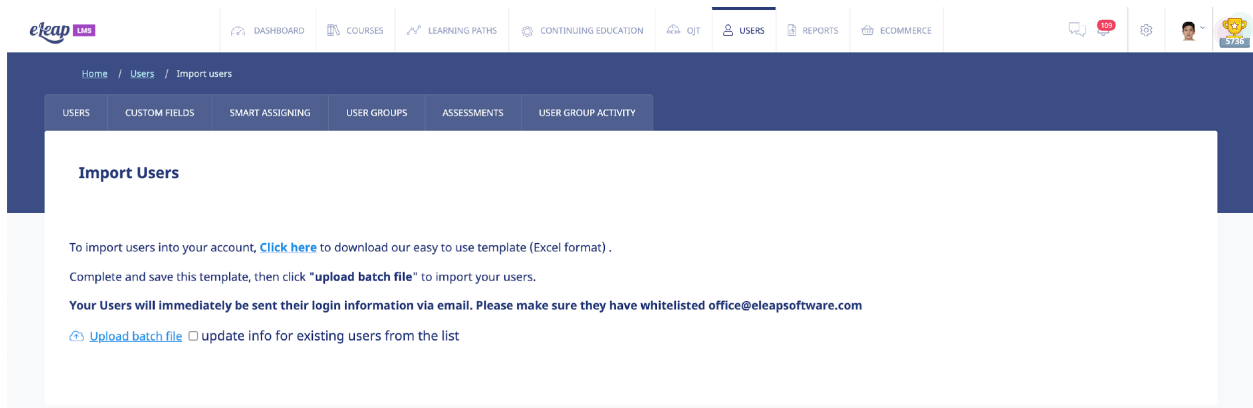
Are you sure you want to delete the selected Users? You'll lose all tracking data associated with deleted Users! Restoration cost apply. Continue?

Cancel

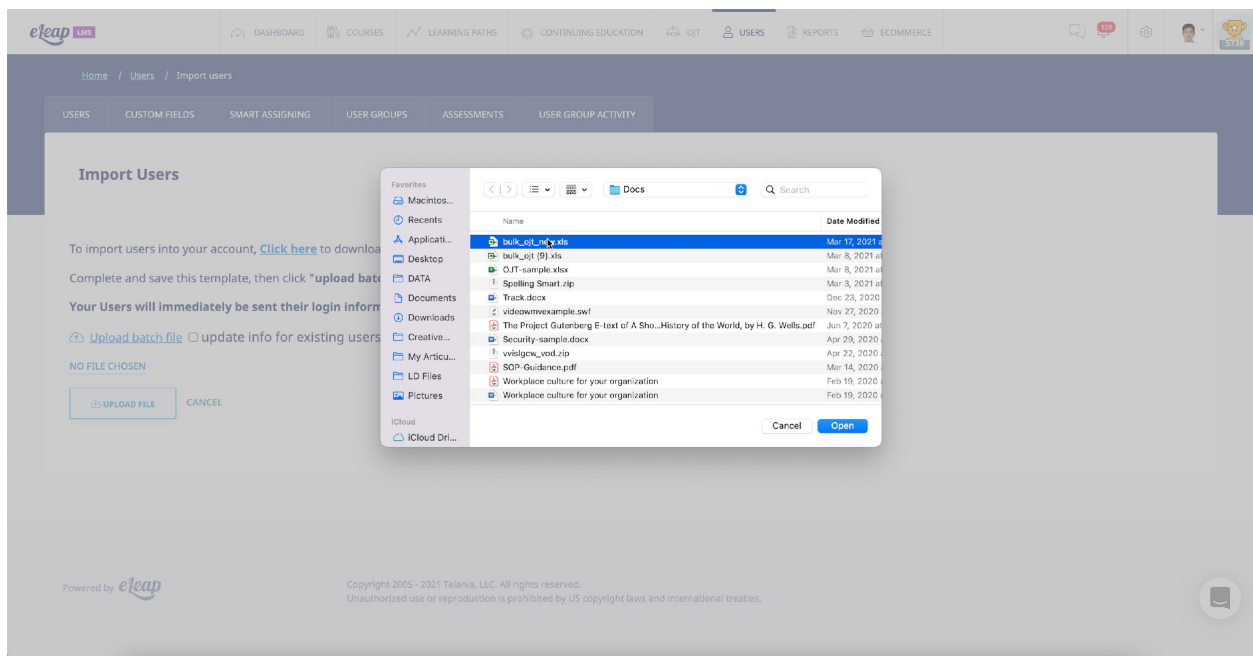
OK

Importing Users

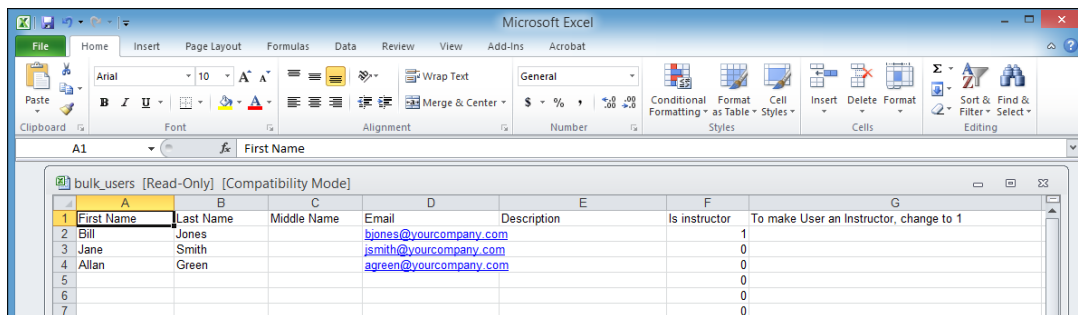
Do you have to create user accounts for **multiple users**? With eLeaP™, you don't have to go through the hassle of creating each account one at a time. Use the **Import Users** feature to accomplish this task. Selecting the **IMPORT USERS** tab on the **Users** screen displays the **Import Users** screen, as shown in the following illustration.



To import users into your account, select the **click here** link to begin the Import Process. As shown in the following illustration, you are presented with a dialog that allows you to either **Open**, **Save** or **Save As** the **bulk_users.xls** file.

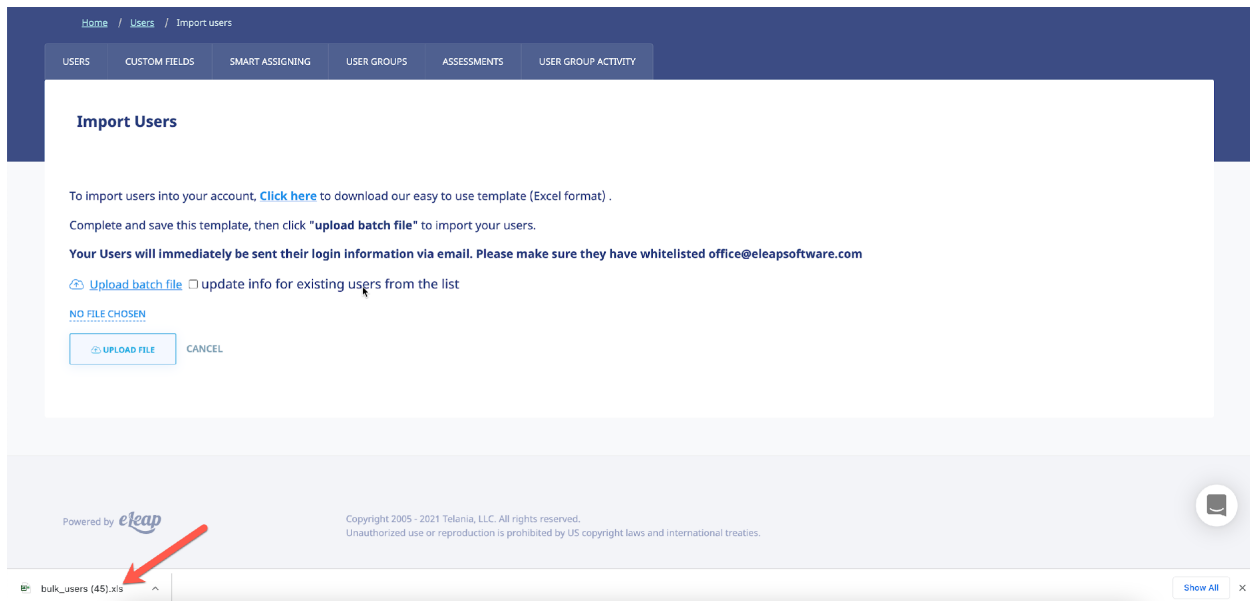


Selecting the **Save** option will download the file to your computer, where you can open it in Excel to add the Users that you would like to import. As shown in the following illustration, the bulk users file provides you with **First Name**, **Last Name**, **Middle Name**, **Email** and **Is instructor** columns of potential User information. Enter each User's information in their respective fields, changing the **Is instructor** column data from 0 to 1 if the User will be an Instructor. If you have enabled [Custom Fields](#) for your account, you can also import the data for these fields. Simply add the names of your fields as additional headers in the import file, and the respective values for your Users. When finished, save the file for uploading to the system. Since the file opened in **Read-Only** mode, click **OK** when Excel displays the **Save a Copy** dialog, and then name file within the **Save as** dialog and click **Save**.



	A	B	C	D	E	F	G
	First Name	Last Name	Middle Name	Email	Description	Is instructor	To make User an Instructor, change to 1
1	Bill	Jones		b.jones@yourcompany.com		1	
2	Jane	Smith		j.smith@yourcompany.com		0	
3	Allan	Green		a.green@yourcompany.com		0	
4						0	
5						0	
6						0	
7						0	

Now you can return to the **IMPORT USERS** tab and select the upload batch file link, as shown in the following illustration.



Home / Users / Import users

USERS CUSTOM FIELDS SMART ASSIGNING USER GROUPS ASSESSMENTS USER GROUP ACTIVITY

Import Users

To import users into your account, [Click here](#) to download our easy to use template (Excel format) .

Complete and save this template, then click "upload batch file" to import your users.

Your Users will immediately be sent their login information via email. Please make sure they have whitelisted office@eleapsoftware.com

[Upload batch file](#) ☐ update info for existing users from the list

NO FILE CHOSEN

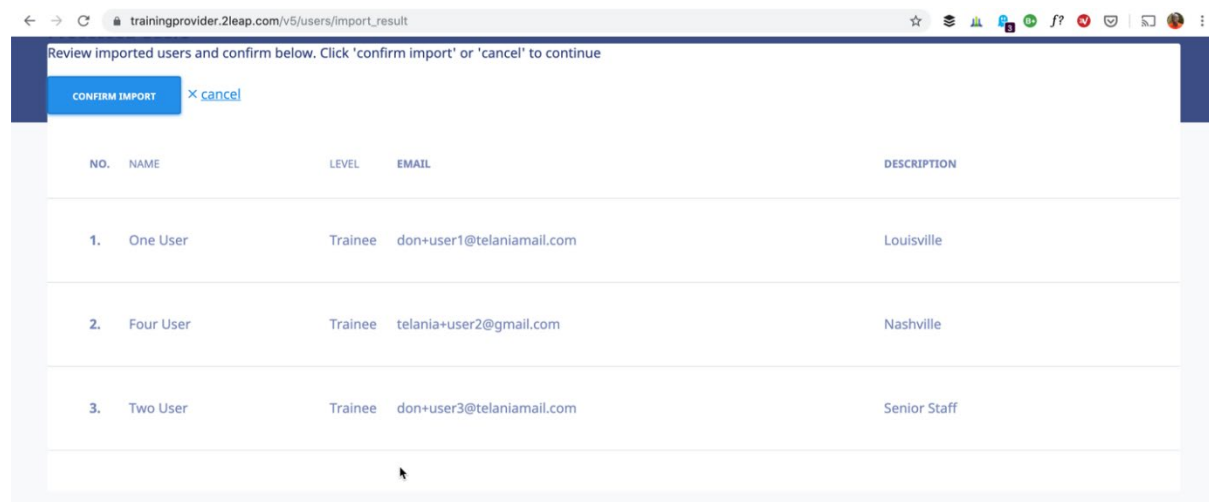
Powered by **eLeaP**

Copyright 2005 - 2021 Telania, LLC. All rights reserved.
Unauthorized use or reproduction is prohibited by US copyright laws and international treaties.

bulk_users (45).xls

Show All

The **Processed Users** screen, illustrated below, is displayed, confirming that your imported Users have been added. If importing these users has pushed you past the maximum number of Users based on your price plan, as shown in the message on this example screen, please contact billing@eleapsoftware.com.





Updating Users through Import

When importing users, if the “update info for existing users from the list” box is checked, then you can update information for many existing users at once.

Note: if a field is left blank in the import file, it will make that field blank in the system. If you do not wish to overwrite existing data for a user, make sure that data is included in your import file!

Custom Fields

Selecting the **Custom Fields** tab on the **Users** screen will allow you to manage custom profile fields in your account. Use the  button to create a new Custom Field. Simply enter the name of the new field into the text box, then click  to save your work.

After adding a Custom Field, you will be able to populate that field through the **Add New User**, **Edit User Profile**, and/or **Import Users** functions.

Filtering

You can use your Custom Fields to filter lists of Users. On the main Users screen, for example, you can click on the “Show custom fields filters” link below the Name field in the filtering area to access these filters. Select which field you want to filter by, the condition you want to use in your filter, and then enter a value for the filter. Press the Filter button to apply. You may use multiple filters at one time. You

will find these filters on most reports and assignment pages.

Home / Users / User List

USERS CUSTOM FIELDS SMART ASSIGNING USER GROUPS ASSESSMENTS USER GROUP ACTIVITY

Users 52 TOTAL USERS

EXPORT USER ACTIVITY BULK IMPORT ADD NEW USER

Search user by name Select Level Select User Group Is Active? APPLY FILTERS Show custom fields filters

Custom Filters:

Shift is equal to Third

New Hire is equal to Yes

Select Custom Field is equal to Value

NO.	NAME	DESCRIPTION	LOCATION	EMPLOYEE ID	SHIFT	DATE CREATED	ACTIVE
1.	A. Hermine ADMINISTRATOR hermineadamyam.dev@gmail.com					07/15/2019	<input checked="" type="checkbox"/>

Smart Assigning

The Smart Assigning feature is a powerful tool that allows you to micro-target your Course, Learning Path, and User Group assignments based on the contents of your Custom Fields.

After you create your first Custom Field, the Smart Assigning tab will appear on the Users screen. Clicking on the tab will open up the Smart Assigning menu. The page is divided into two areas: at the top are menus and fields that will let you design a new Smart Assigning Rule. Below that are listed any already-existing Rules.

Add New Assigning Rule

If
THE USER HAS

Location: Louisville

is equal to

AND

Select Custom Field

is equal to

Value

Then
ASSIGN THIS

Training Path: New Employee Onboarding

AND THIS

Select type

[REMOVE](#)

ADD RULE **CANCEL**

Creating a Smart Assigning Rule

Every Smart Assigning Rule has two components: an “IF” part and a “THEN” part. The “IF” part of the Rule tells eLeaP the conditions that the Rule applies to. The “THEN” part of the Rule tells eLeaP what to do when the IF conditions are met.

Step One: Create Your IF

- Use the “Select Custom Field” drop-down menu to select a Custom Field whose contents you want to use as a condition for your Rule.
- Select the strength and direction of the condition. By default this field displays “is equal to”, but you can also choose “is not equal to”, “contains” and “does not contain” when creating your Rule.
- Enter the value you want the system to look for.

Example: I choose my “Region” Custom Field, “contains”, and then enter “North” for my value. So *the IF part of my rule says, “User’s Region contains ‘North’.”* This Rule would catch Users with both “North Carolina” and “North Dakota” in their Region field.

Select Custom Field

Region

is equal to

is not equal to

contains

does not contain

North

User's Region contains "North"

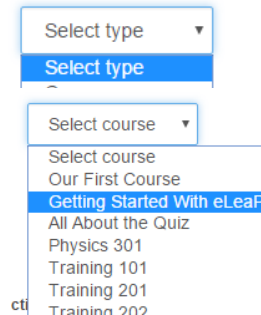
Step Two: Create Your THEN

- Use the “Select type” drop-down menu to choose between “Course”, “Learning Path”, and

“User Group” for what type of assignment action you want the Rule to do for you.

- After you select a type, a new drop-down menu will appear with the list of existing Courses, Learning Paths, or User Groups in your system (depending on what type you chose).
- Select an item from the new drop-down menu.
- Click the “Add Rule” button to finish the process.

Assign this



ADD NEW ASSIGNING RULE

Example: I choose “Course” from the first drop-down menu. Then from my list of available active Courses that appear, I choose “Getting Started With eLeaP.” So the *THEN* part of my rule says, “Assign this course: **Getting Started With eLeaP.**”

Assign this course: **Getting Started With eLeaP**

Step Three: Using Your Rule

There are two ways a Rule can run. It can run in the background, checking every new User and edited User to see if they qualify for its conditions. Or, it can be run on a one-time, “check everyone” basis. Or you can use these two ways in tandem.

- To have your rule run in the background on new and changed Users, make it Active by toggling the active clicking the “Activate” icon next to your rule (it looks like a little red circle with a white “x” through it).
- To have your rule check all existing Users on a one-time basis, use the **EXECUTE** link for that Rule.



If there are large numbers of Users in your account (1000 or more), clicking the “execute” link make take a few minutes. The page will refresh and display a notification when the process is complete.

Advanced: Multiple IFs/THENS

If you’ve already created one or more Rules, you probably noticed that when you choose a Custom Field or assignment Type, another set of drop-downs appear automatically. This is so that you can create more complex Rules.

10.	User's Location is equal to "Atlanta" AND User's Shift is equal to "Third"	Assign this course: Aviation 101	<input checked="" type="checkbox"/>	02/26/2019	EXECUTE DELETE
11.	User's Location is equal to "California"	Assign this course: A Manager's Guide to Surviving the Slings & Arrows (Legal & Behavioral Challenges of Management)	<input checked="" type="checkbox"/>	04/09/2019	EXECUTE DELETE
12.	User's Role is equal to "Manager"	Assign this course: AWESOME: A New Generation at Work, Engaging Generation Y	<input checked="" type="checkbox"/>	04/18/2019	EXECUTE DELETE
13.	User's Company-Wide is equal to "Yes"	Assign this course: Accident Investigation	<input checked="" type="checkbox"/>	08/26/2019	EXECUTE DELETE
14.	User's Level is equal to "5"	Assign this course: AWESOME: A New Generation at Work, Engaging Generation Y	<input checked="" type="checkbox"/>	08/28/2019	EXECUTE DELETE
15.	User's Location is equal to "Texas" AND User's Role is equal to "New Hire"	Assign this course: Assessment AND this training path: Knowledge resources for users	<input type="checkbox"/>	08/30/2019	EXECUTE DELETE

On the IF side of your Rule, you have the option to determine whether your additional conditions use “AND” or “OR” when they are evaluated by the system. Let’s look at some examples to see how this works:

Using AND

For our first example, let’s set up a Rule that has two conditions on the IF side, with the second one added as an “AND” condition – this just means I make sure that the first drop-down menu on the second condition shows “AND” (which is the default). I’ll use “Region contains North” for my first condition, and “Job Title is equal to Tester” for my second condition. This means the IF part of my Rule reads like this:

User's Region contains "North"
AND
User's Job Title is equal to "Tester"

User's Region contains North AND User's Job Title is equal to Tester.

So this Rule will only apply to Users who meet *both* of the specified conditions.

Using OR

To demonstrate “OR”, I’ll use the same conditions. What I’ll do differently is select “OR” from the drop-down menu at the front of the second condition. Once again, I’ll use “Region contains North” for my first condition and “Job Title is equal to Tester” for my second condition. So now the IF part of my Rule reads like this:

User's Region contains "North"
OR
User's Job Title is equal to "Tester"

The User has

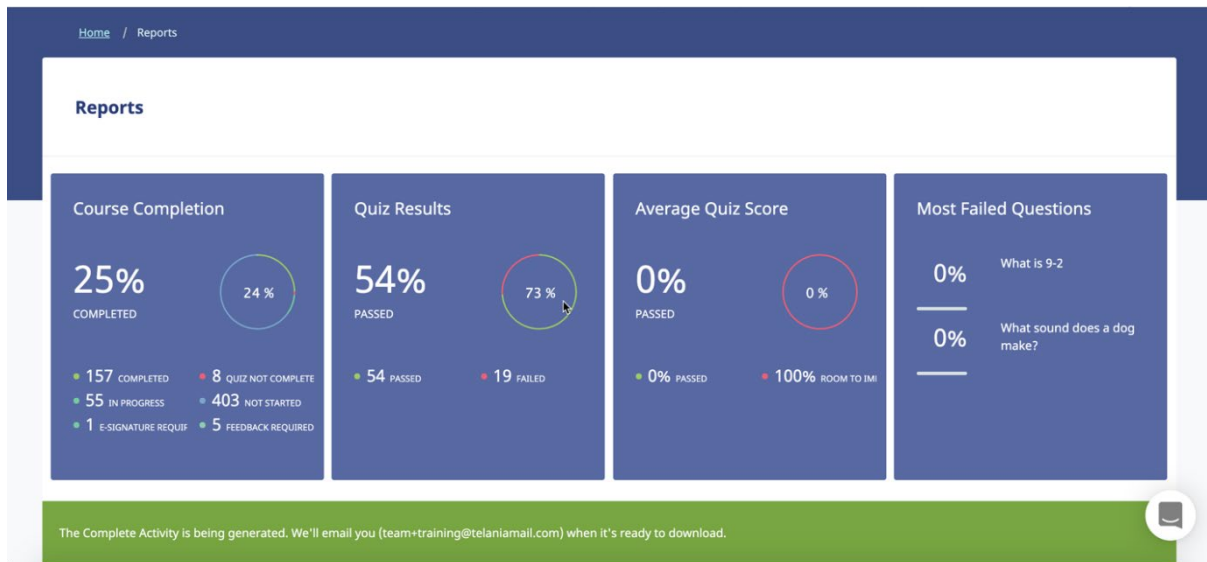
User's Region contains North OR User's Job Title is equal to Tester.

So this Rule will catch Users who meet *either* of the specified conditions.

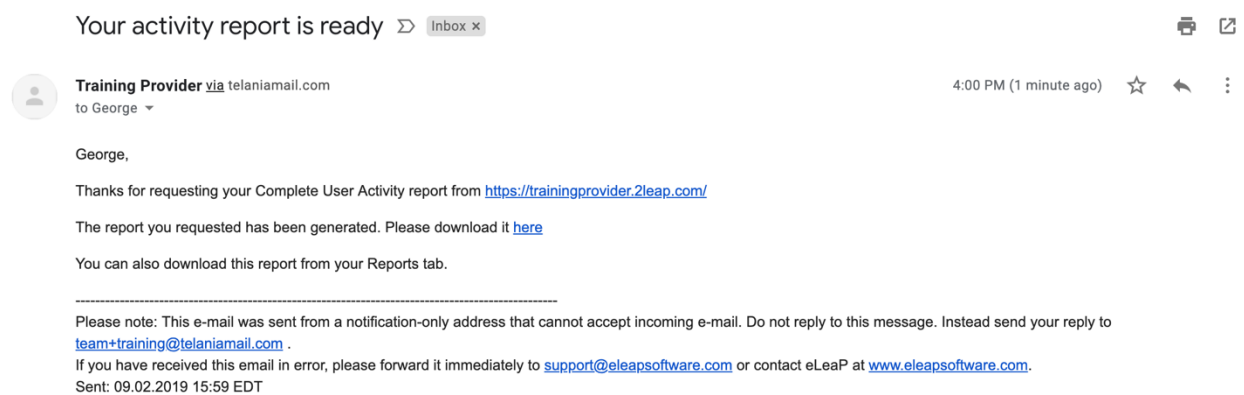
That's really all there is to it. Try mixing and matching ORs and ANDs for some really micro-targeted Rules.

Exporting User Activity

Selecting the [EXPORT USER ACTIVITY](#) link on the **Users** screen allows you to export all User Activity for Users displayed on the **Users** list to your computer. When request is submitted, eLeaP will process it and send an email to the requester's email as shown below. Once the report is ready, you can download and save it.



Email confirmation of processed file:



Once you have downloaded the file, it is displayed within Excel, as shown in the following illustration. The **Course, Full Name, Email, Description, Assigned Date, Deadline, Progress, Completion Date, Quiz Completed, Quiz Score, Quiz Pass Score, Quiz Max Score, Quiz Status, Quiz Completion Date, User**

Groups(s) and **Active/Inactive** details for each **User/Course** combination on the **User Activity** list is displayed.

HomeInsertDrawPage LayoutFormulasDataReviewView

Paste

Arial

10

A⁺

A⁻

B

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U

...

...

...

...

Wrap Text

General

Conditional Formatting

Format as Table

Cell Styles

Insert

Delete

Format

Σ

↶

↷

↻

Sort & Filter

Find & Select

Ideas

ShareComments

E1

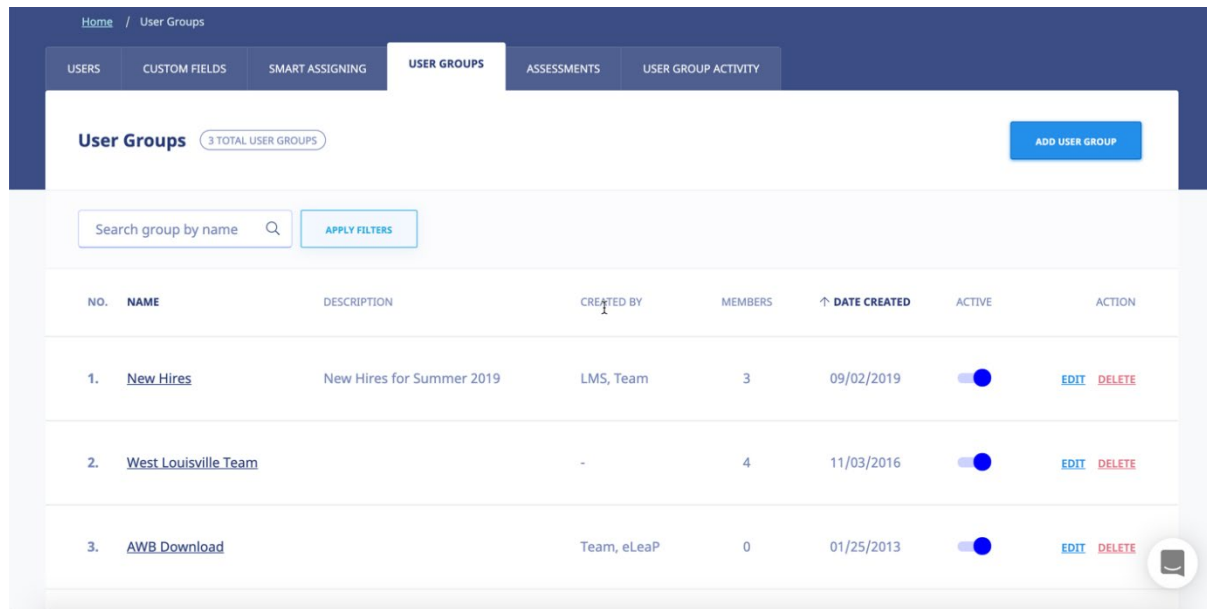
<

User Groups

Use our simple User Groups feature to organize your users into manageable groups. Selecting

USER GROUPS sub-tab from the **USERS** tab on the main menu bar displays the **User Groups** screen, illustrated below. User Groups that you create are displayed on a **User Groups** list, with a group's **Name**, **Description**, **Created by**, **Members**, **Date** and **Active** details shown. The User Groups list can be filtered

by entering a User Group Name from the **User Group Name** list and then clicking **APPLY FILTERS**. You can add additional User Groups by clicking the **add new User Groups** link at the right-hand side of the screen. Clicking on a User Group Name allows you to add members to the User Group. Additionally, you can edit an existing User Group by clicking the **edit** link within the **Action** column. You can also delete an existing User Group by clicking the **delete** link within the **Action** column.




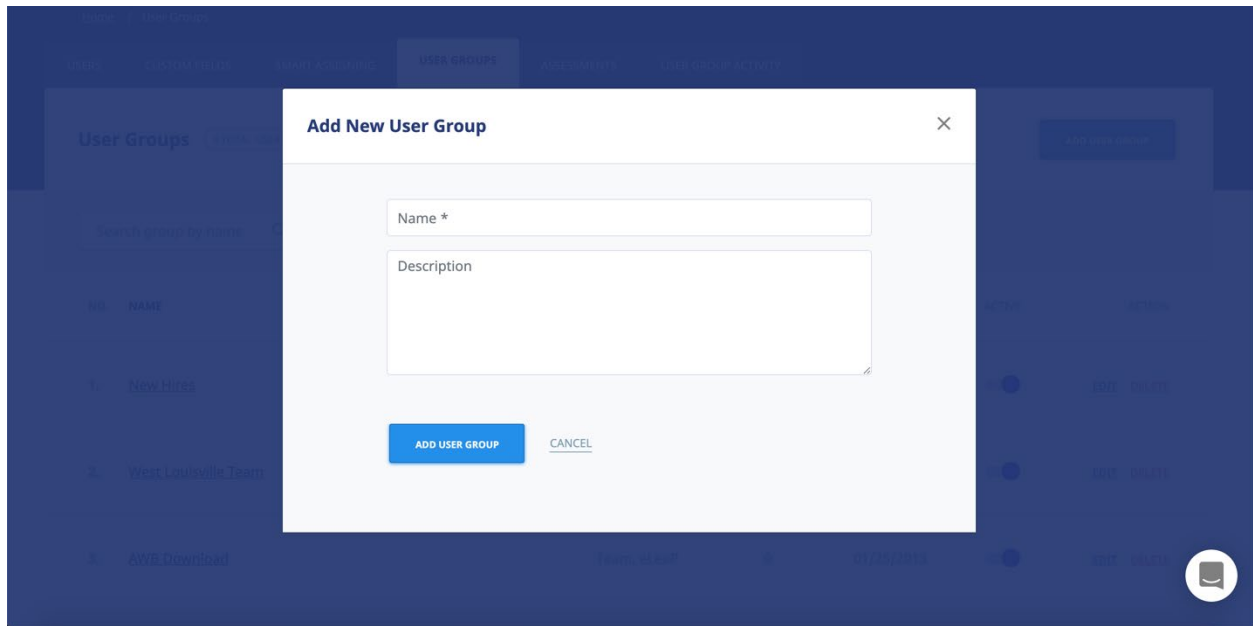
Note: You can add and delete members to/from a User Groups. Just click on the specific User Groups you want to manage or edit.

Note: Create a test User Group for your courses and quizzes. First deploy your courses, assessments, etc., to this User Group before deploying it to the entire company or learning group. This way you can make changes if needed.


Note: You can 'reuse' an existing **User** list to create new User Groups. While the system won't re-create new accounts for re-uploaded names, the system will add the names to the new User Group. So if you want to create a new User Group using an existing list, simply upload the list into the new User Group.

Adding a New User Group

Clicking the  link on the User Groups screen displays the **Add User Group** screen, as shown in the following illustration. Use the steps below to successfully add a User Group to the system.

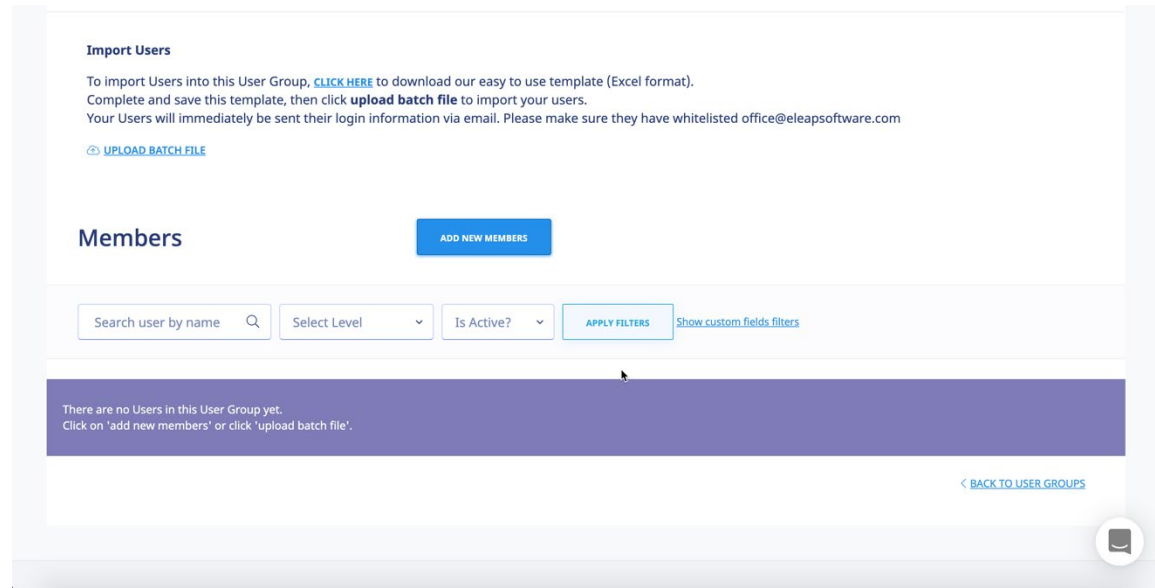
The screenshot shows a web application interface with a dark blue header and sidebar. A modal dialog box titled "Add New User Group" is centered on the screen. The dialog has a white background and a close button (X) in the top right corner. Inside the dialog, there are two input fields: "Name *" and "Description". Below these fields are two buttons: "ADD USER GROUP" (highlighted in blue) and "CANCEL". The background of the application is slightly dimmed, showing a "User Groups" list with entries like "New Hires", "West Louisville Team", and "AWS Download".


1. Enter a name for the new User Group within the **Name** field.
2. Enter a description for the new User Group within the **Description** field.
3. Click **ADD USER GROUP**. The new User Group will be added to the **User Groups** list, alphabetically.

Note: To activate your new User Groups, you can toggle the active status to **ON** .

Adding Members to a User Group

Once you have created a User Group, you will need to add members to the group. This is accomplished by clicking the User Group's name on the **User Groups** list. The **User Group Details** screen, shown in the following illustration, is displayed. Use the steps below to successfully add a member to a User Group.



1. Click the  link in the bottom right-hand corner of the screen. A list of available Users is displayed, as shown in the following illustration. Select the check box for each User on the **Users** list that you want to add as a Member to the User Group, and then click



The screenshot shows the 'MANAGE USER GROUP' interface. At the top, there's a breadcrumb trail: Home / User Groups / EOS / Supervisors. Below this is a navigation bar with tabs: USERS, CUSTOM FIELDS, SMART ASSIGNING, MANAGE USER GROUP (active), SUPERVISORS, ASSESSMENTS, and USER GROUP ACTIVITY. The main content area shows 'EOS' with '71 TOTAL USERS'. There are filters for 'User or Email', 'Select Access Level', 'Select User Group', and a 'FILTER' button. A link 'Show custom fields filters' is also present. Below the filters is a table with columns: NO., NAME, LEVEL, EMAIL, INSERT DATE, and ACTIVE. The table lists four users: 41. Stahlman, Margaret Murphy (Trainee, valerie1@gmail.com, 10/29/2017), 42. Steve, Steve (Trainee, don+steve@telaniamail.com, 05/30/2017), 43. Styles, Anna (Trainee, eleaptraining@gmail.com, 06/08/2021), and 44. Supervisor, Dion (Supervisor, telania+user20@gmail.com, 03/09/2017). At the bottom, there's a summary bar showing '6' selected users, with buttons for 'ADD SELECTED' and 'RESET SELECTION'.

As shown in the following illustration, the Users you have selected are added to the User Group.

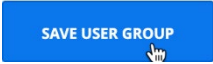
The screenshot shows the 'EOS' user group details page. It has a header 'EOS' with '26 MEMBERS'. Below this is a table with columns: NAME, EOS, DESCRIPTION, ACTIVE, CREATOR, and CREATED ON. The table shows one member: NAME, EOS, DESCRIPTION, ACTIVE, CREATOR, and CREATED ON. Below the table, there's a section 'Import Users' with instructions: 'To import Users into this User Group, [CLICK HERE](#) to download our easy to use template (Excel format). Complete and save this template, then click **upload batch file** to import your users. Your Users will immediately be sent their login information via email. Please make sure they have whitelisted office@eleapsoftware.com'. There's a link 'UPLOAD BATCH FILE'. Below this is a section 'Members' with buttons 'EXPORT USER LIST' and 'ADD NEW MEMBERS'. At the bottom, a green banner states 'The selected users have been added to this group'.

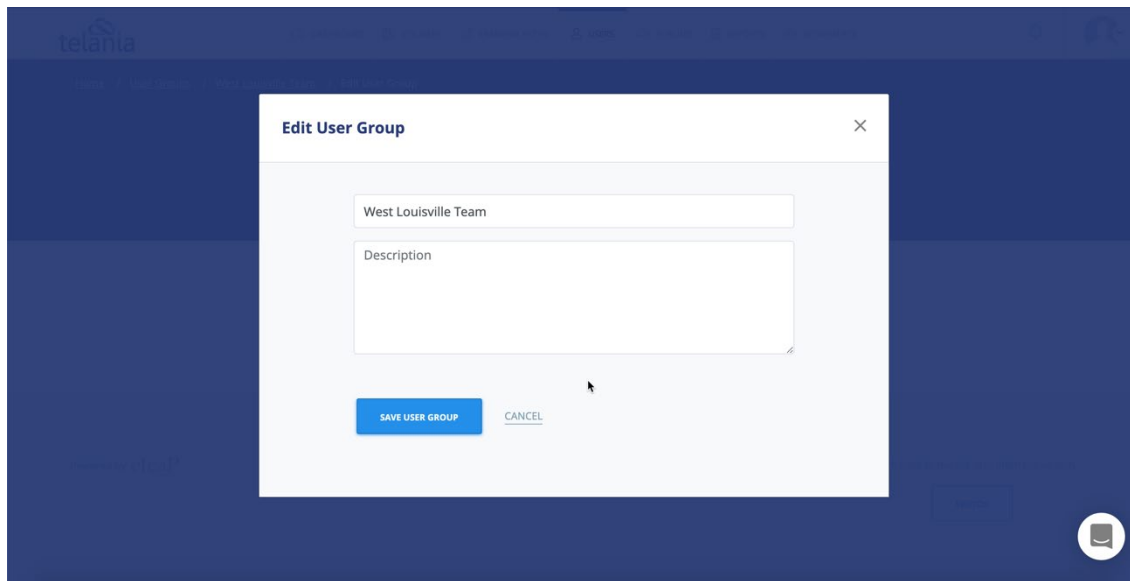
You can remove Members from the User Group at any time by selecting their check box on the Members list and clicking the **remove users from group** link. Additionally, you can send an email to any of the Members of the User Group by clicking their **Email** link.

- Optionally, you can import users/members by selecting the **click here** link within the **Import Users** portion of the screen. Please refer back to the [Importing Users](#) section of the document


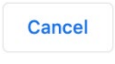
for details on how to import users into the system.

Editing a User Group

To edit an existing User Group, click the edit link for the group on the **User Groups** list within the [User Groups](#) screen. The **Edit User Group** screen, illustrated below, is displayed. Simply make any modifications necessary within the **Name** and/or **Description** field and then click  to save your changes to the system.



Deleting a User Group


To delete an existing User Group, click the **delete** link for the group on the **User Groups** list within the **User Groups** screen. As shown in the following illustration, the system displays a warning message before performing the deletion. Click  to proceed with the deletion or click  to cancel the deletion process.

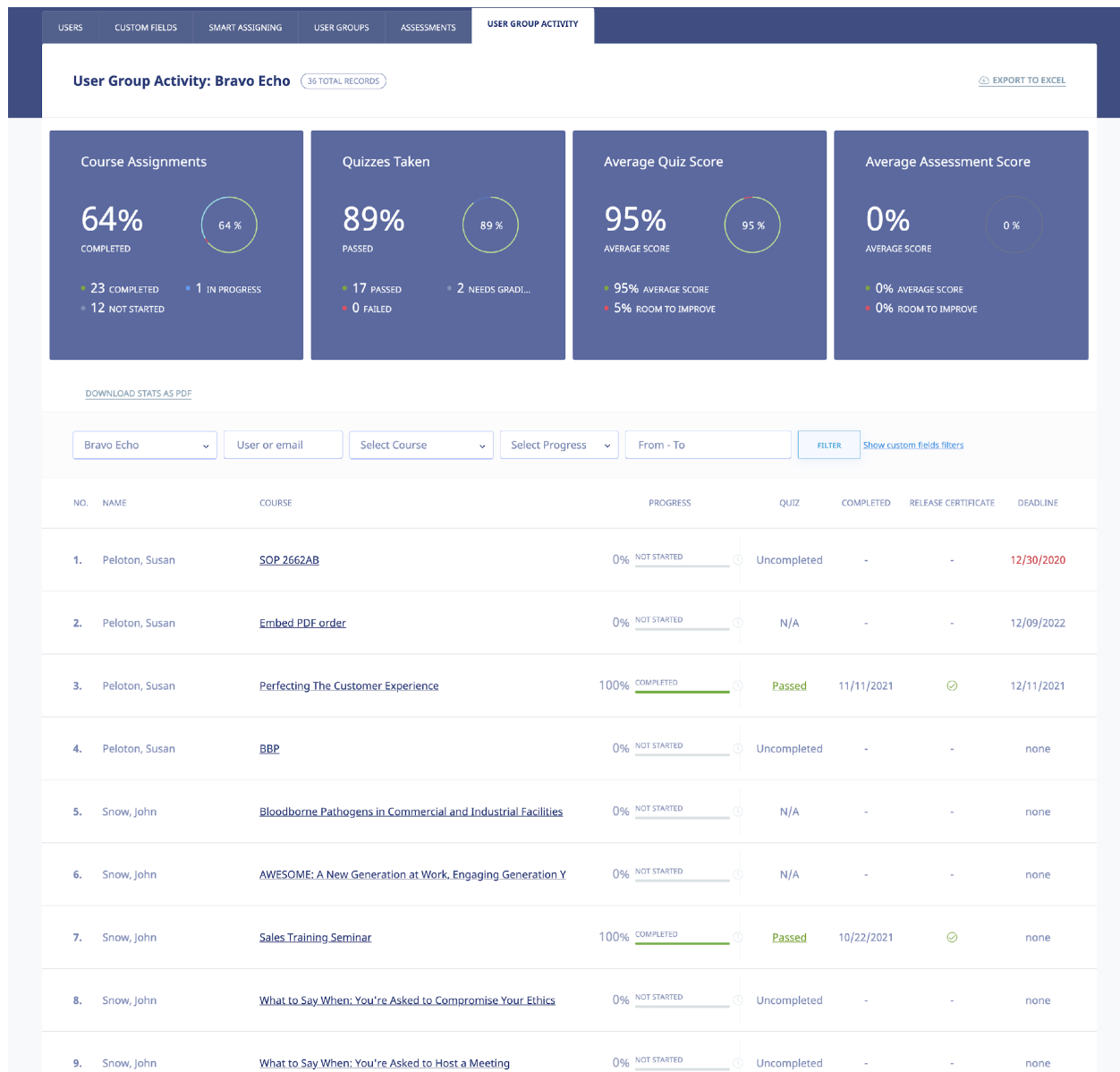
loveyourlms.2leap.com says

Are you sure you want to delete this user group?



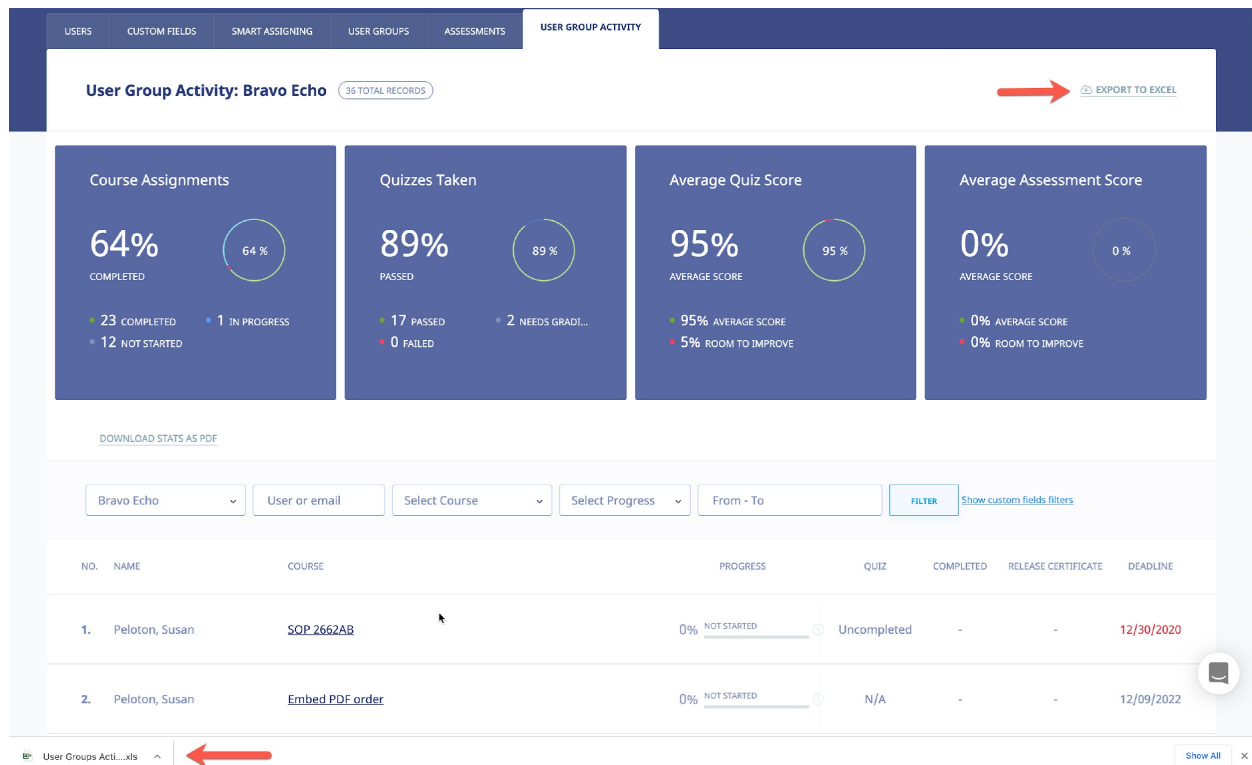
User Group Activity

Selecting the **USER GROUP ACTIVITY** tab on the **User Groups** screen displays the **User Group Activity** screen, illustrated below. This screen displays the current activity for each Member of User Group on a User Group Activity list. A User's **Name**, **Course**, **Progress**, **Quiz**, **Quiz Completed**, **Release Certificate** and **Deadline** details for a User and Course. You can filter what is displayed on the **User Activity** list by selecting a User Group from the **User Group** list, selecting a Course from the **Course** list, or by defining a date range using the **Calendar** icon to select the beginning and end date for the range or by manually entering those dates, and then clicking .



Exporting User Group Activity

Selecting the **Export User Activity** tab on the **User Groups** screen allows you to export all User Activity for the User Groups displayed on the **Users Groups** list to your computer. As shown in the following illustration, you are presented with the option to **Open** or **Save** the **User Groups Activity.xls** file to a local drive on your computer.




Once you have downloaded the file, it is displayed within Excel, as shown in the following illustration. The **Course**, **Full Name**, **Email**, **Description**, **Assigned Date**, **Deadline**, **Progress**, **Completion Date**, **Quiz Completed**, **Quiz Score**, **Quiz Pass Score**, **Quiz Max Score**, **Quiz Status**, **Quiz Completion Date**, **User Groups(s)** and **Active/Inactive** details for each **User Activity/Course** combination on the **User Activity** list is displayed.

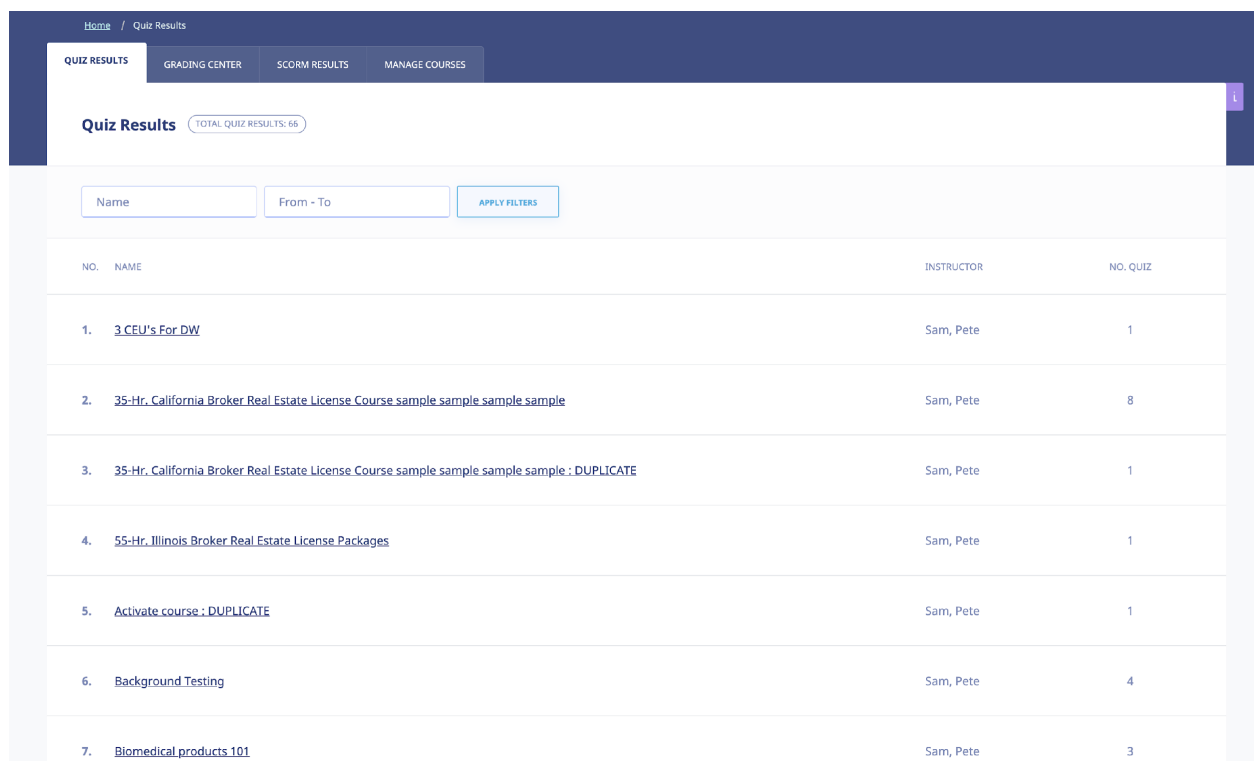
eLeaP Administrator's Manual (V5+CEM)

User Groups Activity (5).xls - Compatibility Mode													
Q Search Sheet													
Home Insert Draw Page Layout Formulas Data Review View													
Share Comments													
General													
Conditional Formatting													
Format as Table													
Cell Styles													
Insert Delete Format													
Sort & Filter													
Find & Select													
Ideas													
E1													
Description													
No.	Course	Full Name	Assigned Date	Deadline	Progress [%]	Completed	Quiz Completed	Quiz Score	Quiz Pass Score	Quiz Max Score	Quiz Status	Quiz	
1	Creating a Mindset for Change (Leaders) Part 1: Ch	Cook, George	02/12/2018	03/12/2018	In Progress [0%]		NO Quiz		0	0			
2	Bloodborne Pathogens in Commercial and Industrial	Cook, George	04/26/2017	-	Not started		NO Quiz		0	0			
3	Micro Learning - How to Engage	Cook, George	03/27/2017	-	Completed	03/13/2017	YES	100%	80.00%	100%	Passed		
4	AWESOME: A New Generation at Work, Engaging C	Cook, George	04/26/2017	-	Completed	12/01/2017	NO Quiz		0	0			
5	Microsoft Access 2010 - Creating Effective Reports	Cook, George	03/27/2017	-	Not started		NO Quiz		0	0			
6	Sales Training Seminar	Cook, George	04/26/2017	-	Completed	03/14/2017	YES	100%	80.00%	100%	Passed		
7	Safety Training 101	Cook, George	03/24/2017	-	Completed	05/14/2017	YES	100%	80.00%	100%	Passed		
8	Safety Training - Week 1	Cook, George	03/14/2017	04/14/2017	Completed	03/14/2017	YES	75%	80.00%	100%	Failed		
9	Safety Training - Week 2	Cook, George	03/14/2017	04/14/2017	Not started		NO		80.00%	100%	Uncompleted		
10	Safety Training - Week 3	Cook, George	03/14/2017	04/14/2017	Not started		NO		80.00%	100%	Uncompleted		
11	Safety Training - Week 4	Cook, George	03/14/2017	04/14/2017	Not started		NO		80.00%	100%	Uncompleted		
12	What to Say When: You#039;re Asked to Compro	Cook, George	04/26/2017	-	Not started		NO		80.00%	100%	Uncompleted		
13	What to Say When: You#039;re Asked to Host a N	Cook, George	04/26/2017	-	Not started		NO		80.00%	100%	Uncompleted		
14	SCORM is a type of course	Cook, George	04/26/2017	-	Not started		NO		80.00%	100%	Uncompleted		
15	Quarterly Review Meeting	Cook, George	10/16/2017	-	Completed	11/29/2017	YES	100%	100.00%	100%	Passed		
16	Accident Investigation	Cook, George	12/13/2017	-	Not started		NO Quiz		0	0			
17	HS HIPAA Security Checklist	Cook, George	07/27/2017	-	In Progress [4%]		NO Quiz		0	0			
18	Microsoft Access 2010 - Creating Effective Reports	Cook, George	08/04/2017	-	Not started		NO Quiz		0	0			
19	Anyone Can Be An Ally: Speaking up for an LGBT	Cook, George	04/26/2018	-	In Progress [0%]		NO Quiz		0	0			
20	Course for North Health Admins	Cook, George	04/26/2018	-	Completed	04/26/2018	NO Quiz		0	0			
21	Preventing Sexual Harassment for Managers and S	Cook, George	11/27/2017	05/27/2018	Completed	04/03/2018	NO Quiz		0	0			
22	Safety CBT	Cook, George	01/23/2018	-	Completed	06/04/2019	YES		2	2	Failed		
23	Simple Customer Service	Cook, George	01/26/2018	-	Completed	04/16/2018	NO Quiz		0	0			
24	Skills assessment	Cook, George	03/06/2018	-	Completed	03/26/2018	NO Quiz		0	0			
25	Smart Assessment	Cook, George	03/09/2018	-	Completed	04/03/2018	NO Quiz		0	0			
26	Safety and Living Skills - SELF ASSESSMENT	Cook, George	05/08/2018	-	Not started		NO Quiz		0	0			
27	Company Safety 2018	Cook, George	09/24/2018	10/24/2018	Not started		NO Quiz		0	0			
28	Video for Training	Cook, George	06/14/2018	-	In Progress [33%]		NO		100.00%	100%	Uncompleted		
29	Pharmacy 101	Cook, George	12/31/2018	01/29/2019	Completed	12/31/2018	YES	100%	80.00%	100%	Passed		
30	Customer Service Gone Viral	Cook, George	08/20/2018	-	Not started		NO Quiz		0	0			
31	Data Security Compliance: Avoiding Inadvertent Di	Cook, George	08/20/2018	-	Not started		NO Quiz		0	0			
32	Systems Training 101	Cook, George	09/07/2018	09/08/2018	Completed	06/04/2019	YES		2	3	Failed		
33	Course: Future and Best Practices Aug 19	Cook, George	09/14/2018	-	In Progress [33%]		NO Quiz		0	0			
34	Customer service training	Cook, George	09/20/2018	03/20/2019	Feedback required [100%]		NO Quiz		0	0			
35	New video training	Cook, George	10/31/2018	11/31/2019	Not started		NO		100.00%	100%	Uncompleted		
36	Aviation 101	Cook, George	01/17/2019	02/07/2019	Completed	01/17/2019	NO Quiz		0	0			
37	First Aid	Cook, George	04/29/2019	-	In Progress [0%]		NO Quiz		0	0			
38	Performance review for G2	Cook, George	05/22/2019	-	Completed	05/22/2019	NO Quiz		0	0			
39	Powerpoint safety meeting	Cook, George	06/11/2019	-	In Progress [50%]		NO Quiz		0	0			
40	Powerpoint safety meeting v2 : DUPLICATE	Cook, George	06/19/2019	-	Completed	08/16/2019	NO Quiz		0	0			
41	656d	Cook, George	07/15/2019	-	Not started		NO Quiz		0	0			
42	ADVChem	Cook, George	08/26/2019	-	Not started		NO Quiz		0	0			
43	New Hire Orientation Course - Welcome	Cook, George	08/29/2019	-	In Progress [33%]		NO		2	0	Uncompleted		
Report													
Count: 187													

Quiz Results

You can access your **Quiz Results** and **Grading** and **Assessment Center** to learn how well your trainees/employees or students are doing. The **Grading Center** allows you to manually grade certain types of Quiz questions such as short essays, Hotspot type questions and other subjective questions.

To access your **QUIZ RESULTS**, click the **QUIZ RESULTS** tab in the COURSES menu. This screen consists of three tabs, **QUIZ RESULTS**, **GRADING CENTER** and **SCORM RESULTS**, with the **QUIZ RESULTS** tab displayed by default. You can filter the Results displayed on the Quiz Results list based on a date range, either by manually entering dates in the **From** and **To** fields, or by using the **Calendar** icon to display a calendar where you can select them, and then clicking . Each Quiz Result on the Quiz Results list shows the **Name**, **Instructor** and **No. Quiz** details displayed for each Quiz Result.



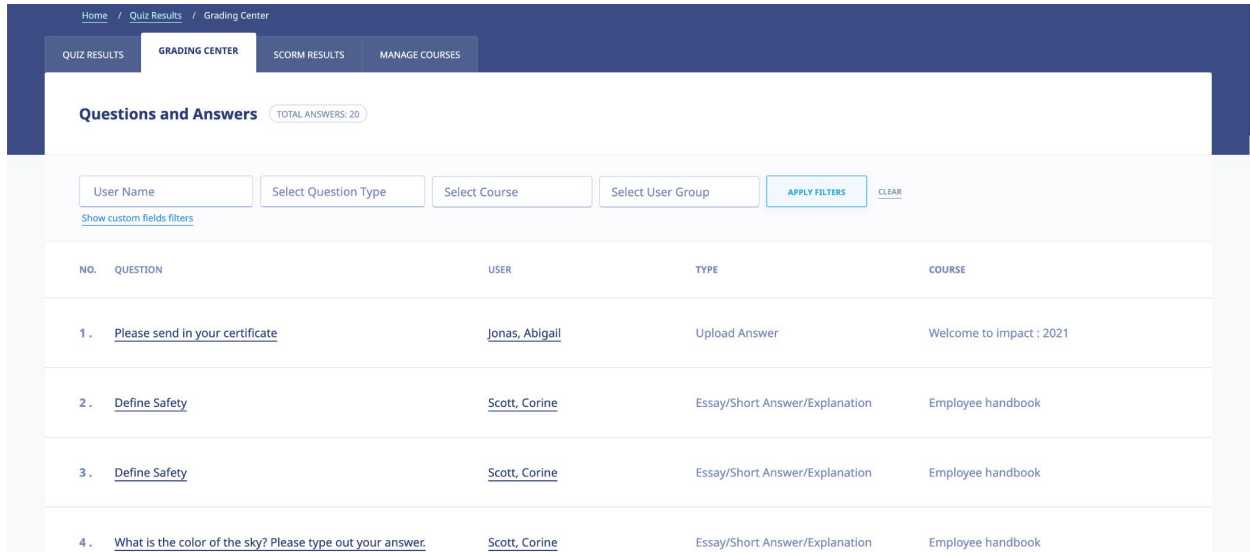
The screenshot shows the 'Quiz Results' page. At the top, there's a navigation bar with 'Home / Quiz Results' and tabs for 'QUIZ RESULTS', 'GRADING CENTER', 'SCORM RESULTS', and 'MANAGE COURSES'. Below the tabs, the 'Quiz Results' section has a 'TOTAL QUIZ RESULTS: 66' indicator. There are filter fields for 'Name', 'From - To', and an 'APPLY FILTERS' button. The main content is a table with columns 'NO.', 'NAME', 'INSTRUCTOR', and 'NO. QUIZ'.

NO.	NAME	INSTRUCTOR	NO. QUIZ
1.	3 CEU's For DW	Sam, Pete	1
2.	35-Hr. California Broker Real Estate License Course sample sample sample sample	Sam, Pete	8
3.	35-Hr. California Broker Real Estate License Course sample sample sample sample : DUPLICATE	Sam, Pete	1
4.	55-Hr. Illinois Broker Real Estate License Packages	Sam, Pete	1
5.	Activate course : DUPLICATE	Sam, Pete	1
6.	Background Testing	Sam, Pete	4
7.	Biomedical products 101	Sam, Pete	3

Selecting a Quiz Result on the **Quiz Results** list displays the **Quiz Results Details** screen for that Quiz Result, as shown in the following illustration. The **Name**, **Points Earned**, **Date and Time** and **Pass/Fail** details are displayed for this Quiz Result. You can click the Export to Excel link to export the Quiz Result to your computer, as well as click the quiz results summary link to view a summary of the Quiz Result. Additionally, you can select the **Quiz Results** check box and then click the **delete selected results** link to

remove this Quiz Result from the system.

The system will automatically assign a temporary grade to employees, trainees or students. You would use the Grading Center to **grade subjective questions** and answers and assign the final grade.



The screenshot shows the 'Grading Center' interface. At the top, there are tabs for 'QUIZ RESULTS', 'GRADING CENTER' (selected), 'SCORM RESULTS', and 'MANAGE COURSES'. Below the tabs, the title 'Questions and Answers' is displayed with a 'TOTAL ANSWERS: 20' badge. A filter section includes input fields for 'User Name', 'Select Question Type', 'Select Course', and 'Select User Group', along with 'APPLY FILTERS' and 'CLEAR' buttons. A link 'Show custom fields filters' is also present. The main content is a table with the following data:

NO.	QUESTION	USER	TYPE	COURSE
1.	Please send in your certificate	Jonas, Abigail	Upload Answer	Welcome to Impact : 2021
2.	Define Safety	Scott, Corine	Essay/Short Answer/Explanation	Employee handbook
3.	Define Safety	Scott, Corine	Essay/Short Answer/Explanation	Employee handbook
4.	What is the color of the sky? Please type out your answer	Scott, Corine	Essay/Short Answer/Explanation	Employee handbook

Exporting Quiz Results

Selecting the Export to Excel link on the **Quiz Results Details** screen will allow you to export the Quiz Results to your computer as an Excel file. As shown in the following illustration, you are presented with the option to either **Open** the file, or **Save** the file.

NAME	POINTS EARNED	# OF RETRIES	LATEST QUIZ TAKEN ON	PASSED
Duff, Judith Ester	2/2	0 RETRIES	01/20/2022 08:10 EST	YES
Jonas, Abigail	2/2	0 RETRIES	12/27/2021 14:15 EST	YES
Scott, Corine	2/2	0 RETRIES	08/18/2022 09:34 EDT	YES


Selecting the **Open** option opens the file in Excel, as shown in the following illustration. You can then use the **File->Save** option within Excel to save the file.

Name	Date & Time	No. of Question	Points Earned	Percent	Pass	# of Retries
Anisti, Cristos	09/17/2021 14:24 EDT	3	3	100%	YES	0
Arthur, Cleveland	11/30/2021 16:50 EST	3	3	100%	YES	0
B, Jacob	11/19/2021 18:50 EST	3	3	100%	YES	0
Cena, Jon	11/11/2021 21:02 EST	3	3	100%	YES	0
Rose, Michelle James	10/17/2021 20:00 EDT	3	3	100%	YES	0
Snow, John	09/17/2021 11:48 EDT	3	3	100%	YES	0
user10, Alan	10/17/2021 21:19 EDT	3	0	0%	NO	0
Walker, Herbert	10/28/2021 09:40 EDT	0	0	0%	YES	0

Viewing Individual User Quiz Results Details

Click the name of the individual user you want detailed results on. You will get detailed results including the number of quiz attempts and retries.

List of Attempts

ATTEMPT	FINALIZED	RESULT	PASSED
1	12/23/2021 13:11 EST 	100%	Yes

Questions and Answers

1

2

3

What is 4x4

Your answer is **Correct**

A

16

CORRECT ANSWER

B

42

Score: 1.00

Feedback:

SAVE FEEDBACK

Download Individual User Quiz Results

Click the [DOWNLOAD AS PDF](#) link to download and print a PDF version of the individual user's quiz results details.

Quiz

7-Hr. Audiologist / Bill Acker

Time Limit	0.00 minutes
No. of Question(s)	3
Minimum score to pass	3.00
The score	3
Quiz started on	19:00 EST

PASSED

List of Attempts

Attempt	Finalized	Result	Passed
1	12/23/2021 13:11 EST	100%	Yes

1. What is 4x4

A	16	Correct answer
B	-12-	

Your answer is **Correct**

Score: 1.00

2. It a lot in Britain

A	rains	Correct answer
B	-rain-	
C	-is-rain-	

Your answer is **Correct**

Score: 1.00

Viewing the Quiz Results Summary

Selecting the **quiz results summary** link on the **Quiz Results Details** screen displays the **Summary** screen, illustrated below. This screen presents a summary of how your Users scored on this Quiz. Each Quiz Question is displayed on a **Quiz Questions** list, with the **No.**, **Question**, **Level**, **Correct/Total** and **Percent** details shown for each Question. You can filter what is displayed on this screen, if necessary, by entering a date range, if necessary, either by manually entering dates in the **From** and **To** fields, or by clicking the

Calendar icon to use the Calendar to select those dates, and then clicking

FILTER

Home / Quiz Results / 35-Hr. California Broker Real Estate License Course... / Summary

35-Hr. California Broker Real Estate License Course sample sample sample sample TOTAL QUESTIONS: 3

From - To FILTER

This is a summary of how your Users scored on this Quiz.

[EXPORT TO EXCEL](#)

NO.	QUESTION	LEVEL	CORRECT/TOTAL	PERCENT
1.	True or False 5+5=12?	medium	6.00 / 7	86% <div><div></div></div>
2.	What 8-3	medium	6.00 / 7	86% <div><div></div></div>
3.	Q4 - What sound does a dog make?	medium	6.00 / 7	86% <div><div></div></div>

[BACK TO QUIZ RESULTS DETAILS](#)

Exporting the Quiz Summary

You can click the **Export to Excel** link to export the Quiz Summary to your computer as an Excel file. As shown in the following illustration, you are presented with the option to either **Open** the file, or **Save** the file.

Home / Quiz Results / 35-Hr. California Broker Real Estate License Course... / Summary

35-Hr. California Broker Real Estate License Course sample sample sample sample TOTAL QUESTIONS: 3

From - To FILTER

This is a summary of how your Users scored on this Quiz.

[EXPORT TO EXCEL](#)

NO.	QUESTION	LEVEL	CORRECT/TOTAL	PERCENT
1.	True or False 5+5=12?	medium	6.00 / 7	86% <div><div></div></div>
2.	What 8-3	medium	6.00 / 7	86% <div><div></div></div>

Quiz Result Sum...xls Show All

Home / Quiz Results / 35-Hr. California Broker Real Estate License Course... / Summary

35-Hr. California Broker Real Estate License Course sample sample sample sample TOTAL QUESTIONS: 3

From - To FILTER

This is a summary of how your Users scored on this Quiz.

[EXPORT TO EXCEL](#)

NO.	QUESTION	LEVEL	CORRECT/TOTAL	PERCENT
1.	True or False 5+5=12?	medium	6.00 / 7	86% <div>86%</div>
2.	What 8-3	medium	6.00 / 7	86% <div>86%</div>

Quiz Result Sum...xls Show All

Deleting Quiz Results

You can delete the Quiz Results by selecting the check box and then clicking **delete selected results**, as shown in the following illustration.

Quiz Results 8 QUESTIONS

7 USERS PASSED 0 USERS IN PROGRESS 1 USERS FAILED

User or Email Select User Group From - To Quiz Status FILTER [Show custom fields filters](#)

[QUIZ RESULTS SUMMARY](#) [EXPORT TO EXCEL](#)

<input type="checkbox"/> NAME	POINTS EARNED	# OF RETRIES	LATEST QUIZ TAKEN ON	PASSED
<input type="checkbox"/> Anisti, Cristos	<div>3/3</div>	<div>0 RETRIES</div>	09/17/2021 14:24 EDT	<div></div>
<input checked="" type="checkbox"/> Arthur, Cleveland	<div>3/3</div>	<div>0 RETRIES</div>	11/30/2021 16:50 EST	<div></div>
<input checked="" type="checkbox"/> B. Jacob	<div>3/3</div>	<div>0 RETRIES</div>	11/19/2021 18:50 EST	<div></div>
<input type="checkbox"/> Cena, Jon	<div>3/3</div>	<div>0 RETRIES</div>	11/11/2021 21:02 EST	<div></div>

DELETE SELECTED RESULTS RESET SELECTION

Quiz Results 8 QUESTIONS

7 USERS PASSED 0 USERS IN PROGRESS 1 USERS FAILED

User or Email Select User Group From - To Quiz Status FILTER [Show custom fields filters](#)

[QUIZ RESULTS SUMMARY](#) [EXPORT TO EXCEL](#)

<input type="checkbox"/> NAME	POINTS EARNED	# OF RETRIES	LATEST QUIZ TAKEN ON	PASSED
<input type="checkbox"/> Anisti, Cristos	3/3	0 RETRIES	09/17/2021 14:24 EDT	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Arthur, Cleveland	3/3	0 RETRIES	11/30/2021 16:50 EST	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> B, Jacob	3/3	0 RETRIES	11/19/2021 18:50 EST	<input checked="" type="checkbox"/>
<input type="checkbox"/> Cena, Jon	3/3	0 RETRIES	11/11/2021 21:02 EST	<input checked="" type="checkbox"/>

[DELETE SELECTED RESULTS](#) [RESET SELECTION](#)

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


trainingprovider.2leap.com says

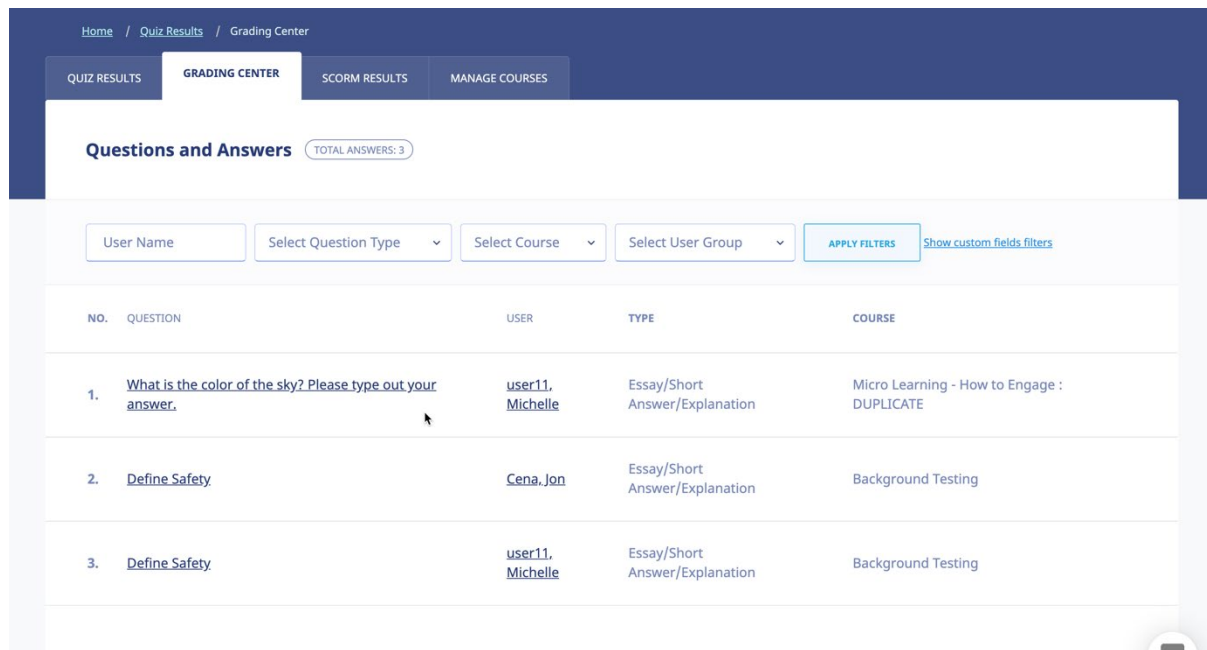
You are deleting the Quiz Results for the selected Course(s). Are you sure?

Cancel


OK

Grading Center

Selecting the **GRADING CENTER** tab on the **Quiz Results** screen displays the **Questions and Answers** screen, illustrated below. This screen displays the Questions associated with a Quiz, with the Question **No.**, **Question**, **Type** and **Course** details for each Question on the **Questions** list. You can filter what is displayed on this screen, if necessary, by selecting from the **Select Question Type** list, making a selection from the **Select Course** list, or both, and then clicking .



NO.	QUESTION	USER	TYPE	COURSE
1.	What is the color of the sky? Please type out your answer.	user11, Michelle	Essay/Short Answer/Explanation	Micro Learning - How to Engage : DUPLICATE
2.	Define Safety	Cena, Jon	Essay/Short Answer/Explanation	Background Testing
3.	Define Safety	user11, Michelle	Essay/Short Answer/Explanation	Background Testing

Clicking the **Question** link on the **Questions** list displays the **Question Details** screen, illustrated below. This screen shows the Question and correct answer for that Question. You can assign a grade to the Answer by selecting from the **Give a score** list. Available options are **1.0** as the highest grade to **0.0** as the lowest. Additionally, you can provide feedback on the answer by entering text within the **Feedback** box. When finished, click  to save these settings to the system.

Question Details

Please identify the state of Kentucky. (Place your cursor over the appropriate state and type in your answer)



Give a score:

1.0

Feedback:

SUBMIT

SCORM Results

Selecting the **SCORM RESULTS** tab on the **Quiz Results** screen displays the **SCORM Results** screen, illustrated below. This screen displays any SCORM Quiz Results on a **SCORM Quiz Results** list, with the Quiz's **Name**, **SCORM COURSE**, **Instructor** and **Total** details for these Quiz Results. You can filter what is displayed on this screen by entering the name of a SCORM Course within the **SCORM Course** field or by defining a date range, either by manually entering the dates in the **From** and **To** fields or by clicking the

Calendar icon and using the Calendar to select those dates and then clicking

APPLY FILTERS

Home / Quiz Results / SCORM Results

QUIZ RESULTS GRADING CENTER **SCORM RESULTS** MANAGE COURSES

SCORM Results (TOTAL SCORM COURSES: 21)

SCORM Course From To APPLY FILTERS

NO.	NAME	SCORM COURSE	INSTRUCTOR	TOTAL
1.	4.Fundamentals for Selling High Value, Complex Solutions - 3 HRS	Fundamental # 3: Strategy	LMS, Team	1
2.	4.Fundamentals for Selling High Value, Complex Solutions - 3 HRS	Fundamental # 2: Differentiation	LMS, Team	1
3.	4.Fundamentals for Selling High Value, Complex Solutions - 3 HRS	Fundamental #1: Qualification	LMS, Team	4
4.	4.Fundamentals for Selling High Value, Complex Solutions - 3 HRS	Fundamental # 4: Navigating the Buying Organization	LMS, Team	1
5.	Certified eLeaP Partner Training	Introduction to Telania, LLC. and eLeaP	LMS, Team	1

Selecting a SCORM Course on the **SCORM Course Results** list displays the details for the SCORM COURSE results for Students who have taken the Course, as shown in the following illustration. You can filter what is displayed here by entering a Student's **Name**, making a selection from the **Select User Group** list or by entering a date range, either by manually entering the dates in the **From** and **To** fields, or by

clicking the **Calendar** icon and using the Calendar to select those dates, and then clicking **APPLY FILTERS**. Each line on the **Students** list shows the Student's **Name**, **Progress**, **Points Earned**, **Pass**, **Session Time** and **Date & Time** details for this particular Course

Home / Quiz Results / SCORM Results / Leadership development

QUIZ RESULTS GRADING CENTER **SCORM RESULTS** MANAGE COURSES

Spelling Smart (TOTAL RESULTS: 2)

User or Email Select User Group From - To FILTER

EXPORT TO EXCEL

NO.	NAME	PROGRESS	POINTS EARNED	PASS	SESSION TIME	DATE & TIME
1.	James, Brother	Completed	100% COMPLETED	✓	35s	12/09/2021
2.	Snow, John	Uncompleted	N/A	N/A	33s	12/09/2021

The screenshot shows the 'SCORM RESULTS' tab for a course titled 'Spelling Smart'. At the top, there are navigation links: Home / Quiz Results / SCORM Results / Leadership development. Below these are tabs: QUIZ RESULTS, GRADING CENTER, SCORM RESULTS (selected), and MANAGE COURSES. The main heading is 'Spelling Smart' with a sub-header 'TOTAL RESULTS:2'. There are filter fields for 'User or Email', 'Select User Group', and 'From - To', followed by a 'FILTER' button. Below the filters is a table with columns: NO., NAME, PROGRESS, POINTS EARNED, PASS, SESSION TIME, and DATE & TIME. The table contains two rows of data. The first row shows a user named 'James, Brother' who has 'Completed' the session, earning 100% points, with a session time of 35s on 12/09/2021. The second row shows a user named 'Snow, John' who has 'Uncompleted' the session, with 'N/A' for points and session time, on 12/09/2021. An 'EXPORT TO EXCEL' link is visible in the top right corner of the table area.

NO.	NAME	PROGRESS	POINTS EARNED	PASS	SESSION TIME	DATE & TIME
1.	James, Brother	Completed	100% COMPLETED	✓	35s	12/09/2021
2.	Snow, John	Uncompleted	N/A	N/A	33s	12/09/2021

Exporting SCORM Results



Selecting the Export to Excel link on the **SCORM Results Details** screen will allow you to export the SCORM Results to your computer as an Excel file. As shown in the following illustration, you are presented with the option to either **Open** the file, or **Save** the file.

The screenshot shows the 'SCORM RESULTS' tab for a course titled 'Bloodborne Pathogens: The Unexpected Hazard - Concise Version'. The navigation path is Home / Quiz Results / SCORM Results / New Hire Orientation Course - Welcome. The tabs are QUIZ RESULTS, GRADING CENTER, SCORM RESULTS (selected), and MANAGE COURSES. The main heading is 'Bloodborne Pathogens: The Unexpected Hazard - Concise Version' with a sub-header 'TOTAL RESULTS:2'. There are filter fields for 'Name', 'Select User Group', 'From', and 'To', followed by a 'FILTER' button. Below the filters is a table with columns: NO., NAME, PROGRESS, POINTS EARNED, PASS, SESSION TIME, and DATE & TIME. The table contains two rows of data. The first row shows a user named 'Bolton, James' who has 'Completed' the session, with a session time of 33m 2s on 08/29/2019. The second row shows a user named 'Cook, George' who has 'Uncompleted' the session, with 'N/A' for points and session time, on 08/29/2019. An 'EXPORT TO EXCEL' link is highlighted with a red arrow in the top right corner of the table area. At the bottom of the table, there is a 'DELETE SELECTED RESULTS' button and a '< BACK TO SCORM RESULTS' link. Below the table, a file download bar shows 'Bloodborne Pat....xls' with a red arrow pointing to it, and a 'Show All' button.

NO.	NAME	PROGRESS	POINTS EARNED	PASS	SESSION TIME	DATE & TIME
1.	Bolton, James	Completed		✓	33m 2s	08/29/2019
2.	Cook, George	Uncompleted	N/A	N/A	2s	08/29/2019

Deleting SCORM Results

You can delete a user's results by selecting their check box on the **User** list and then clicking **delete selected results**. The system displays a warning message before performing the deletion, as shown in

the following illustration, to confirm that is your intention. Click  to proceed with the deletion or click  to cancel the deletion process.


trainingprovider.2leap.com says

You are deleting the Quiz Results for the selected Course(s). Are you sure?

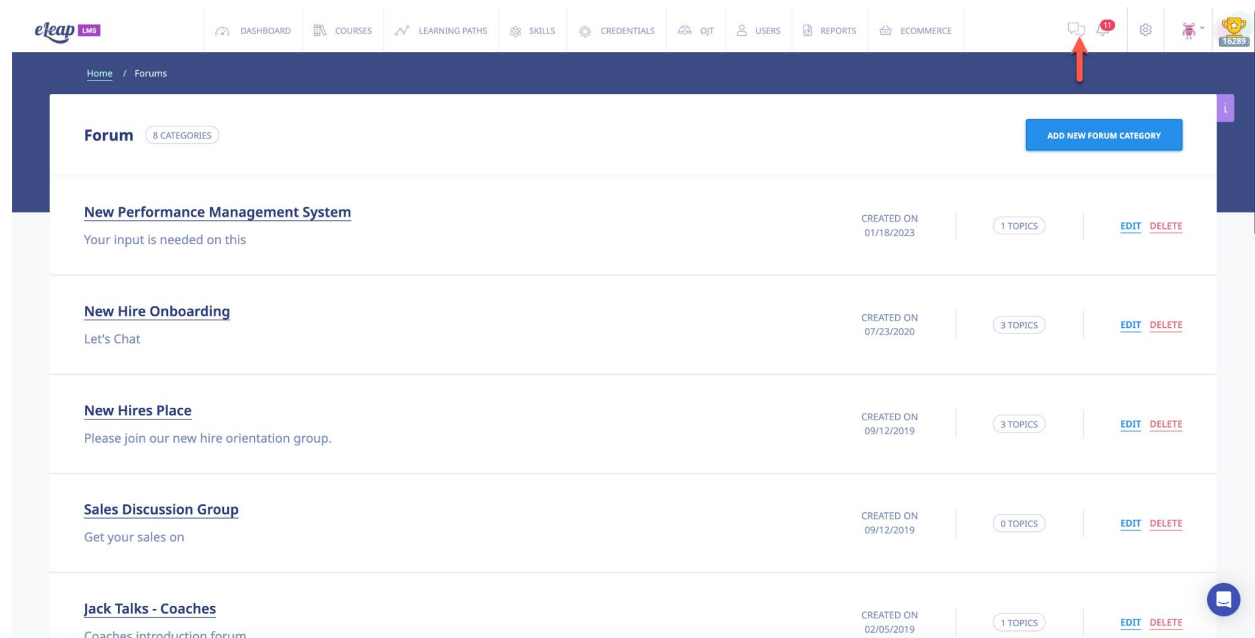
 Cancel

 OK

Forum

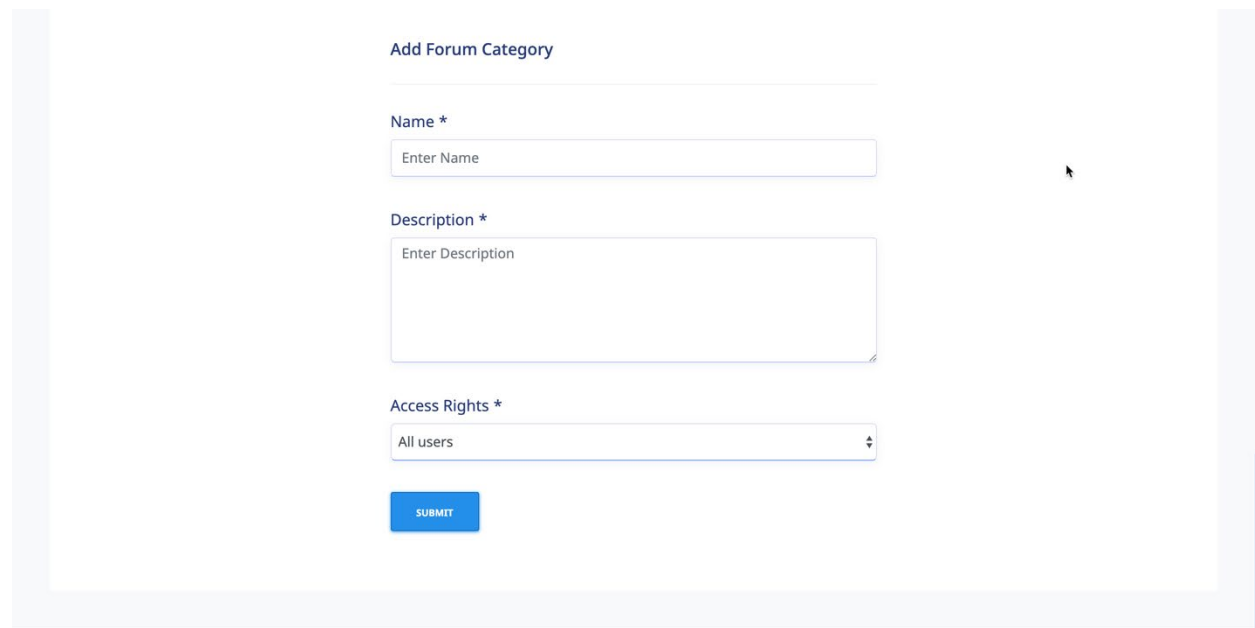
Selecting the  icon in the main menu bar displays the **Forum** screen, illustrated below. Each Forum Category on the **Forum Category** list shows the Forum Category **Name**, **Topics**, and **Date Created** details for the Forum Category. Additionally, you can click the **edit** link to edit a Forum Category or the **delete** link to delete it. eLeaP™ believes that informal learning can be a vital part of designing powerful learning and training programs. After all, the experts tell us that *“80% of workers get their job know-how informally”* Jay Cross (June 2006 TD Magazine).

Forums are a great way to foster this informal and unorthodox learning. Forums allow users to share ideas, and best practices and even develop new methods of problem-solving or generating ideas. That million-dollar idea could come from your training portal's forum site. We encourage you to use these interactive tools in your eLeaP package. Next, we'll create a new Forum Category.



Adding a New Forum Category


Clicking the **ADD NEW FORUM CATEGORY** button on the **Forum Categories** screen allows to you add additional Forum Categories to the system using the **Add Forum Category** screen, as shown in the following illustration.

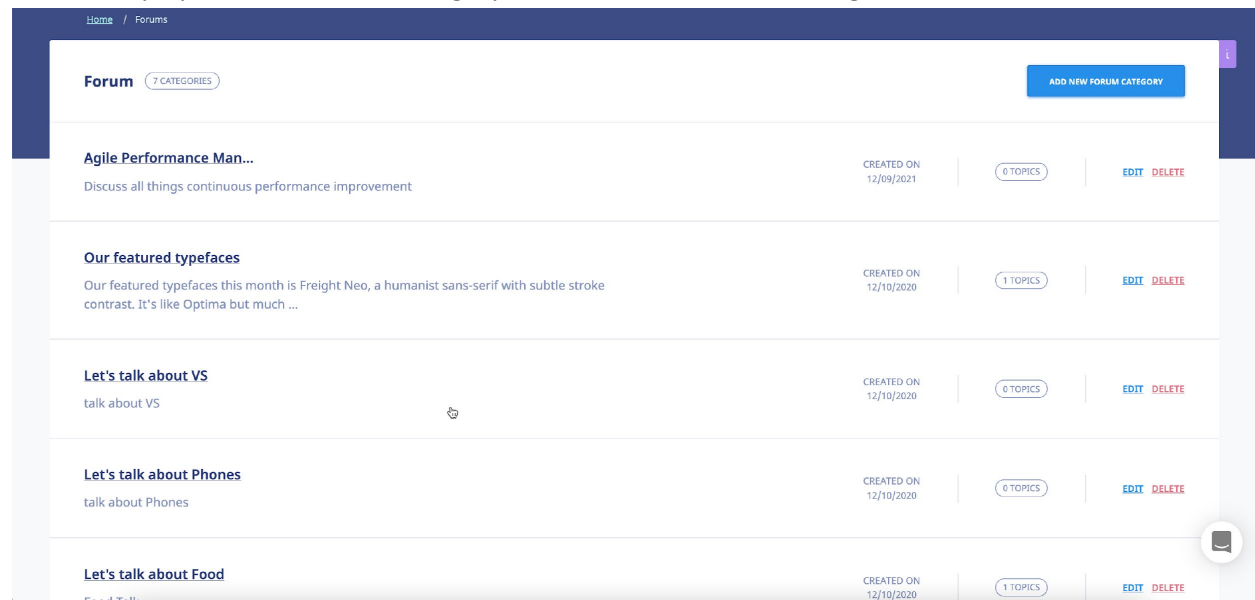


The screenshot shows a web form titled "Add Forum Category". It contains three required fields, each marked with an asterisk (*):

- Name ***: A text input field with the placeholder text "Enter Name".
- Description ***: A larger text area with the placeholder text "Enter Description".
- Access Rights ***: A dropdown menu currently showing "All users".

Below the fields is a blue button labeled "SUBMIT".

1. Enter a name for the new Forum Category in the **Name** field.
2. Enter a description for the new Forum Category in the **Description** box.
3. Select either the **All users** option or the **Defined Access Rules** option from the **Access Rights** list.
4. Click  to add the new Forum Category to the system. The new Forum Category is displayed on the Forum Category list, as shown in the following illustration.



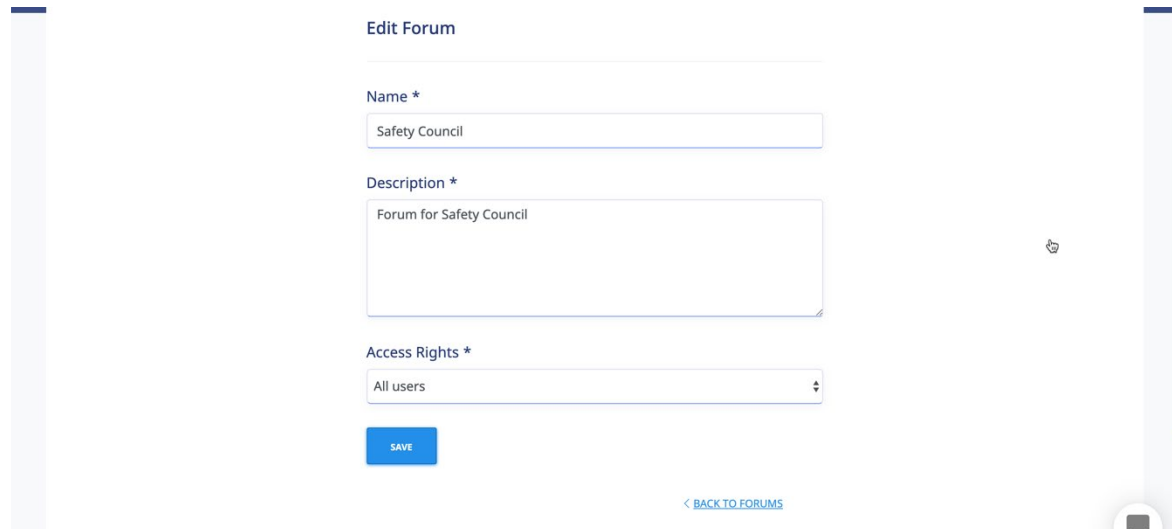
The screenshot shows a list of forum categories. At the top right is a button "ADD NEW FORUM CATEGORY". The list contains five entries, each with a title, a brief description, a "CREATED ON" date, a "TOPICS" count, and "EDIT" and "DELETE" links.

Forum	7 CATEGORIES	ADD NEW FORUM CATEGORY
Agile Performance Man... Discuss all things continuous performance improvement	CREATED ON 12/09/2021	0 TOPICS EDIT DELETE
Our featured typefaces Our featured typefaces this month is Freight Neo, a humanist sans-serif with subtle stroke contrast. It's like Optima but much ...	CREATED ON 12/10/2020	1 TOPICS EDIT DELETE
Let's talk about VS talk about VS	CREATED ON 12/10/2020	0 TOPICS EDIT DELETE
Let's talk about Phones talk about Phones	CREATED ON 12/10/2020	0 TOPICS EDIT DELETE
Let's talk about Food Food Talk	CREATED ON 12/10/2020	1 TOPICS EDIT DELETE

Editing a Forum Category

Clicking the [EDIT](#) link for a Forum Category on the **Forum Category** list allows you to make modifications to that Category using the **Edit Category** screen, as shown in the following illustration. Simply modify the

Name, **Description** and/or **Access Rights** options and then click [SAVE](#) to save your changes to the system.



Deleting a Forum Category

Clicking the [DELETE](#) link for a Forum Category on the **Forum Categories** list allows you to remove a Forum Category from the system. The system first displays a warning message, as shown in the

illustration below, to ensure that is your intention before performing the deletion. Click [OK](#) to proceed with the deletion or click [Cancel](#) to cancel the deletion process.

eleapdemo.2leap.com says

Are you sure?

[Cancel](#)

[OK](#)

Adding a Forum Topic

Selecting a Forum Category on the **Forum Categories** list allows you to add Topics to that Forum Category using the **Forum Category Details** screen by clicking the **add new topic** link, as shown in the following illustration.

The screenshot shows the 'Add Topic' screen within the 'Forum / Safety Council' section. At the top, there is a breadcrumb trail 'Forum / Safety Council' and a button 'ADD NEW TOPIC'. Below this is a search bar with the placeholder text 'Text'. A purple banner message states: 'NO topics CREATED. Click on the 'add new topic' link.' The main form area is titled 'Add Topic' and contains two required fields: 'Forum Topic *' and 'Comment *'. Below these fields is a blue 'SUBMIT' button. At the bottom of the page, there is a link '< BACK TO FORUM CATEGORIES' and a circular icon with a speech bubble.

The **Add Topic** screen, shown in the following illustration, is displayed. Use the steps below to add a new Topic to a Forum Category.

The screenshot shows the 'Add Topic' form in the eLeaP forum. At the top, there is a breadcrumb trail 'Forum / Safety Council' and a button 'ADD NEW TOPIC'. Below this is a search bar with the placeholder text 'Text'. A purple banner message states: 'NO topics CREATED. Click on the 'add new topic' link.' The main form area is titled 'Add Topic' and contains two required fields: 'Forum Topic *' with the value 'New OSHA R&Gs' and 'Comment *' with the text 'Where can we get content for the new OSHA safety regulations?'. A green circular icon with a plus sign is visible in the bottom right corner of the comment field. Below the form is a blue 'SUBMIT' button. At the bottom center, there is a link '< BACK TO FORUM CATEGORIES'. On the right side, there is a circular profile picture placeholder.

1. Enter a name for the new Forum Topic in the **Forum Topic** field.
2. Enter a Comment pertaining to the new Forum Topic in the **Comment** field.
3. Click **Submit**.


As shown in the following illustration the Topic is added to the **Topics** list, with its **Name**, **Started By**, **Posts** and **Open Date** details displayed.

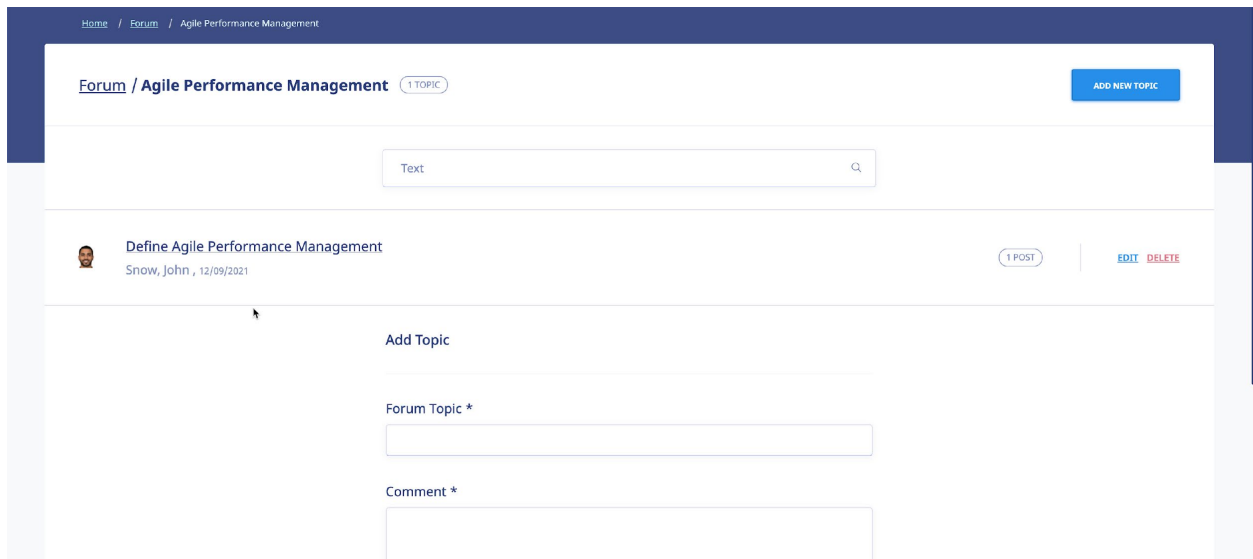
The screenshot shows the forum topics list. At the top, there is a breadcrumb trail 'Home / Forum / New Performance Management System' and a button 'ADD NEW TOPIC'. Below this is a green banner message: 'The topic has been added'. A search bar with the placeholder text 'Text' is visible. The list of topics is as follows:

Topic Name	Started By	Open Date	Posts	Action
Is Skills module ready	Dewey, Doris	04/07/2023	1 POST	EDIT
How do you feel about the new engagement surveys?	Cranston, Eliot	01/18/2023	2 POSTS	


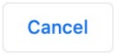
Editing a Forum Topic

Clicking the **edit** link for a Forum Topic on the **Forum Topics** list allows you to make any necessary modifications to that Topic using the **Edit Topic** screen, as shown in the following illustration. Simply make any necessary changes to the **Forum Topic Name** and/or the **Forum Topic Description** and then

click  to save those changes to the system.



Deleting a Forum Topic

Clicking the **delete** link for a Forum Topic on the **Forum Topics** list allows you to remove a Topic from the system. The system first displays a warning message before proceeding with the deletion, as shown in the following illustration. Click  to proceed with the deletion or click  to cancel the deletion process.

eleapdemo.2leap.com says
Are you sure?

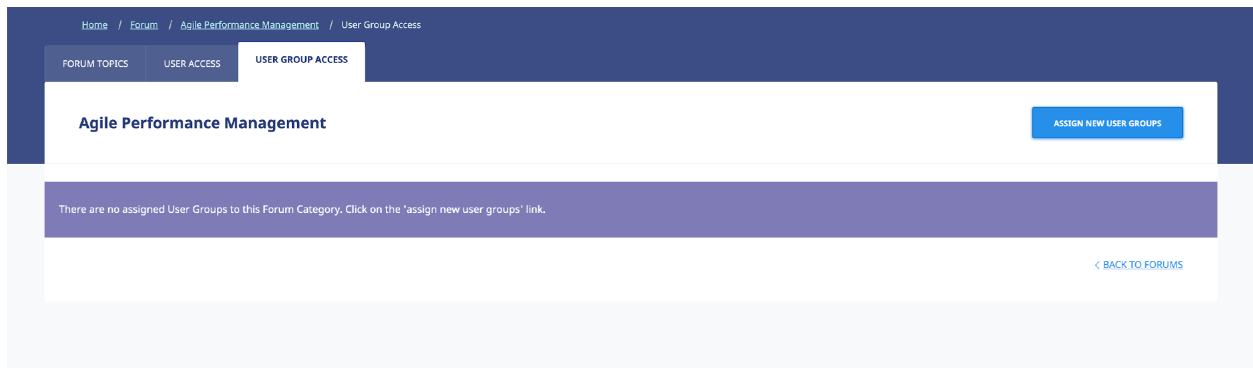
Cancel

OK

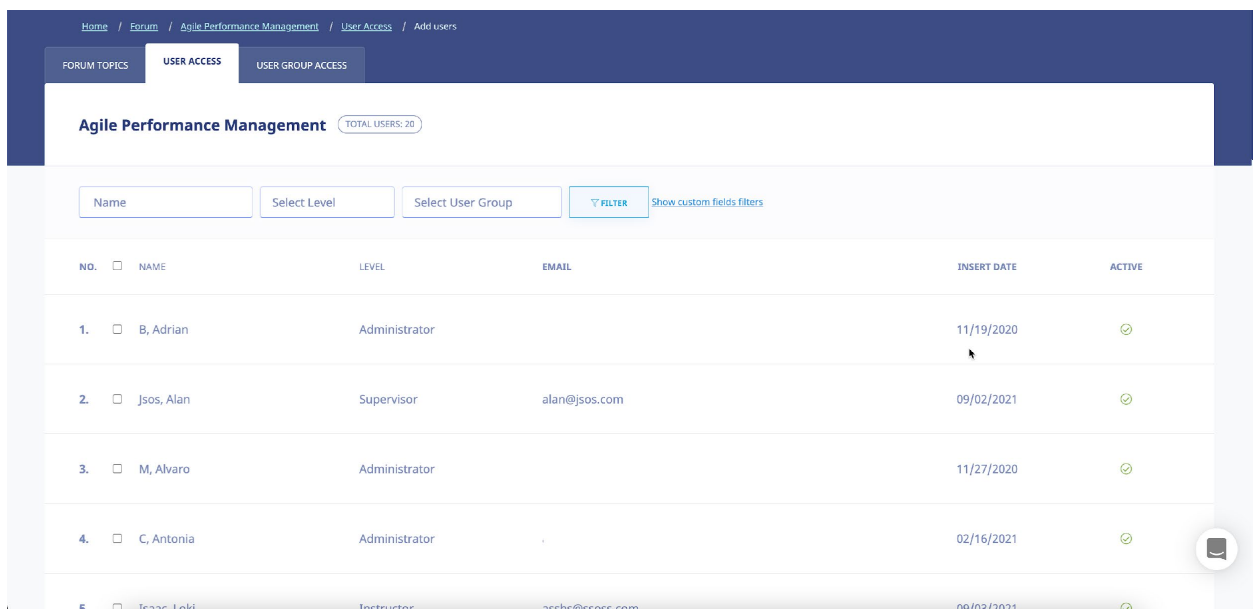
Assigning User Access to a Forum Category

Selecting the **USER ACCESS** tab on the **Forum Category Details** screen allows you to assign Users within the system access to that Forum Category using the **User Access** screen, as shown in the following

illustration. To begin, click the **assign new users** link.



The **Add Users** screen, illustrated below, is displayed. To assign Users access to the Forum Category, select their check box on the **Users** list and then click **ADD SELECTED**.



As shown in the following illustration, the Users are now assigned access to the Forum Category.

Home / Forum / Agile Performance Management / User Access

FORUM TOPICSUSER ACCESSUSER GROUP ACCESS

Agile Performance Management

TOTAL USERS:3

ASSIGN NEW USERS

These users have been added to this forum category

NO.	<input type="checkbox"/> NAME	LEVEL	EMAIL	INSERT DATE
1.	<input type="checkbox"/> Snow, John	Trainee	don+snow@leapsoftware.com	
2.	<input type="checkbox"/> M, Alvaro	Administrator		
3.	<input type="checkbox"/> C, Antonia	Administrator		

Unassigning User Access to a Forum Category

Selecting the **USER ACCESS** tab on the **Forum Details** screen, as shown in the illustration below, allows you to remove a User's access to that Forum. As shown in the illustration, select the check box for a User on the **Users** list and click the **unassign selected users** button.

Home / Forum / Agile Performance Management / User Access

FORUM TOPICS USER ACCESS USER GROUP ACCESS

Agile Performance Management TOTAL USERS: 3 ASSIGN NEW USERS

NO.	<input type="checkbox"/>	NAME	LEVEL	EMAIL	INSERT DATE
1.	<input type="checkbox"/>	Snow, John	Trainee	don+snow@eleapsoftware.com	
2.	<input checked="" type="checkbox"/>	M, Alvaro	Administrator		
3.	<input type="checkbox"/>	C, Antonia	Administrator		

UNASSIGN SELECTED USERS RESET SELECTION

< BACK TO FORUMS

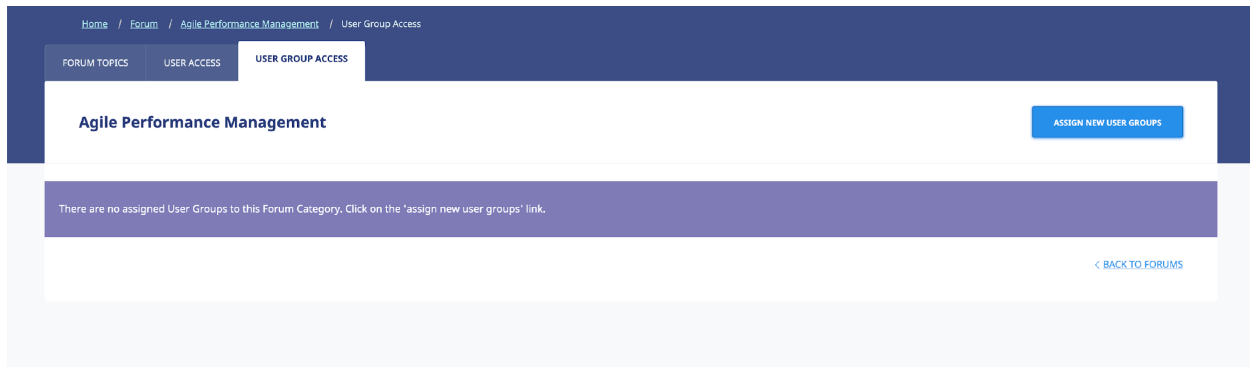
As shown in the following illustration, the system displays a warning message before unassigning the User to ensure that is your intention. Click **OK** to proceed with the un-assignment or click **Cancel** to cancel the deletion process.

eleapdemo.2leap.com says
Are you sure?

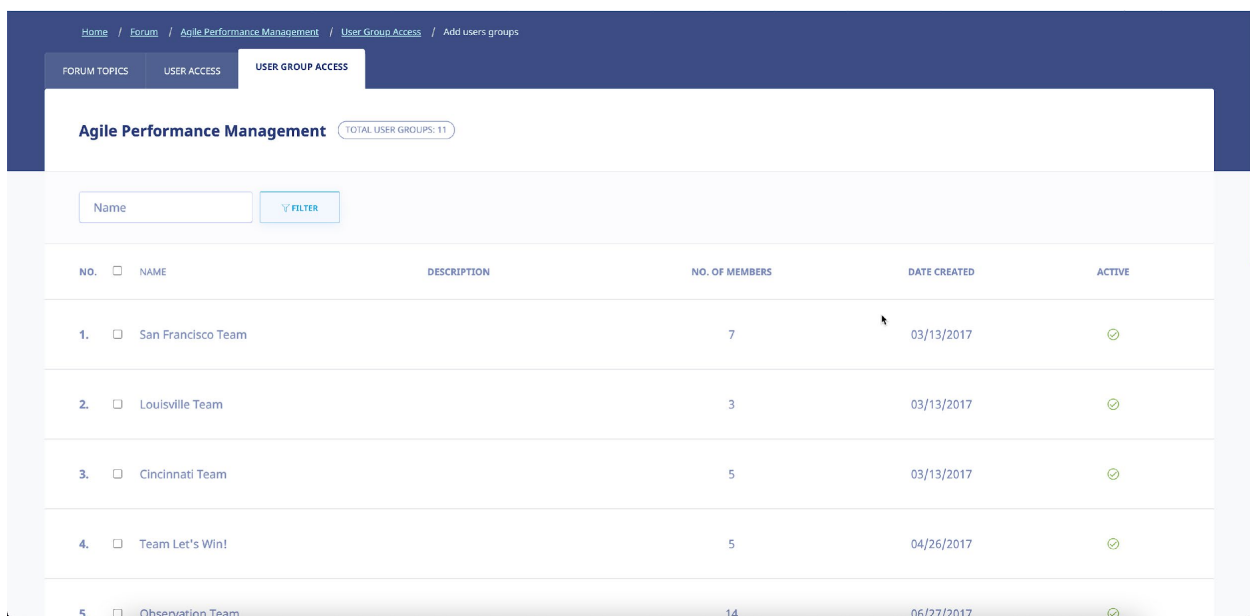
Cancel OK

Assigning User Group Access to a Forum Category

Selecting the **USER GROUP ACCESS** tab on the **Forum Category Details** screen allows you to assign User Groups within the system access to that Forum Category using the **User Group Access** screen, as shown in the following illustration. To begin, click the **assign new User Groups** button.



The **Add User Groups** screen, illustrated below, is displayed.



To assign User Groups access to the Forum Category, select their check box on the **User Groups** list and then click **ADD SELECTED**.

NO.	NAME	DESCRIPTION	NO. OF MEMBERS	DATE CREATED	ACTIVE
1.	<input type="checkbox"/> San Francisco Team		7	03/13/2017	<input checked="" type="checkbox"/>
2.	<input type="checkbox"/> Louisville Team		3	03/13/2017	<input checked="" type="checkbox"/>
3.	<input checked="" type="checkbox"/> Cincinnati Team		5	03/13/2017	<input checked="" type="checkbox"/>
4.	<input checked="" type="checkbox"/> Team Let's Win!		5	04/26/2017	<input checked="" type="checkbox"/>

As shown in the following illustration, the User Groups are now assigned access to the Forum Category.

NO.	NAME	NO. OF MEMBERS	INSERT DATE
1.	<input type="checkbox"/> Cincinnati Team	5	
2.	<input type="checkbox"/> Team Let's Win!	5	

Unassigning User Group Access to a Forum

Selecting the **USER GROUP ACCESS** tab on the **Forum Details** screen, as shown in the illustration below, allows you remove a User Group's access to that Forum. As shown in the illustration, select the check box for a User Group on the **User Groups** list and click the **delete selected user groups** button.

The screenshot displays the 'Agile Performance Management' section of the eLeaP Administrator's Manual. The page has a dark blue header with navigation links: Home, Forum, Agile Performance Management, and User Group Access. Below the header, there are three tabs: FORUM TOPICS, USER ACCESS, and USER GROUP ACCESS. The 'USER GROUP ACCESS' tab is active, showing a table with columns: NO., NAME, NO. OF MEMBERS, and INSERT DATE. The table lists two user groups: 1. Cincinnati Team (5 members) and 2. Team Let's Win! (5 members). A warning message is displayed below the table, stating 'UNASSIGN SELECTED USER GROUPS' and 'RESET SELECTION'. A blue button labeled 'OK' is visible next to the warning message. A blue button labeled 'ASSIGN NEW USER GROUPS' is also present in the top right corner. A blue link labeled '< BACK TO FORUMS' is located at the bottom right of the page.

NO.	NAME	NO. OF MEMBERS	INSERT DATE
1.	Cincinnati Team	5	
2.	Team Let's Win!	5	

UNASSIGN SELECTED USER GROUPS RESET SELECTION

ASSIGN NEW USER GROUPS

< BACK TO FORUMS

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


eleapdemo.2leap.com says

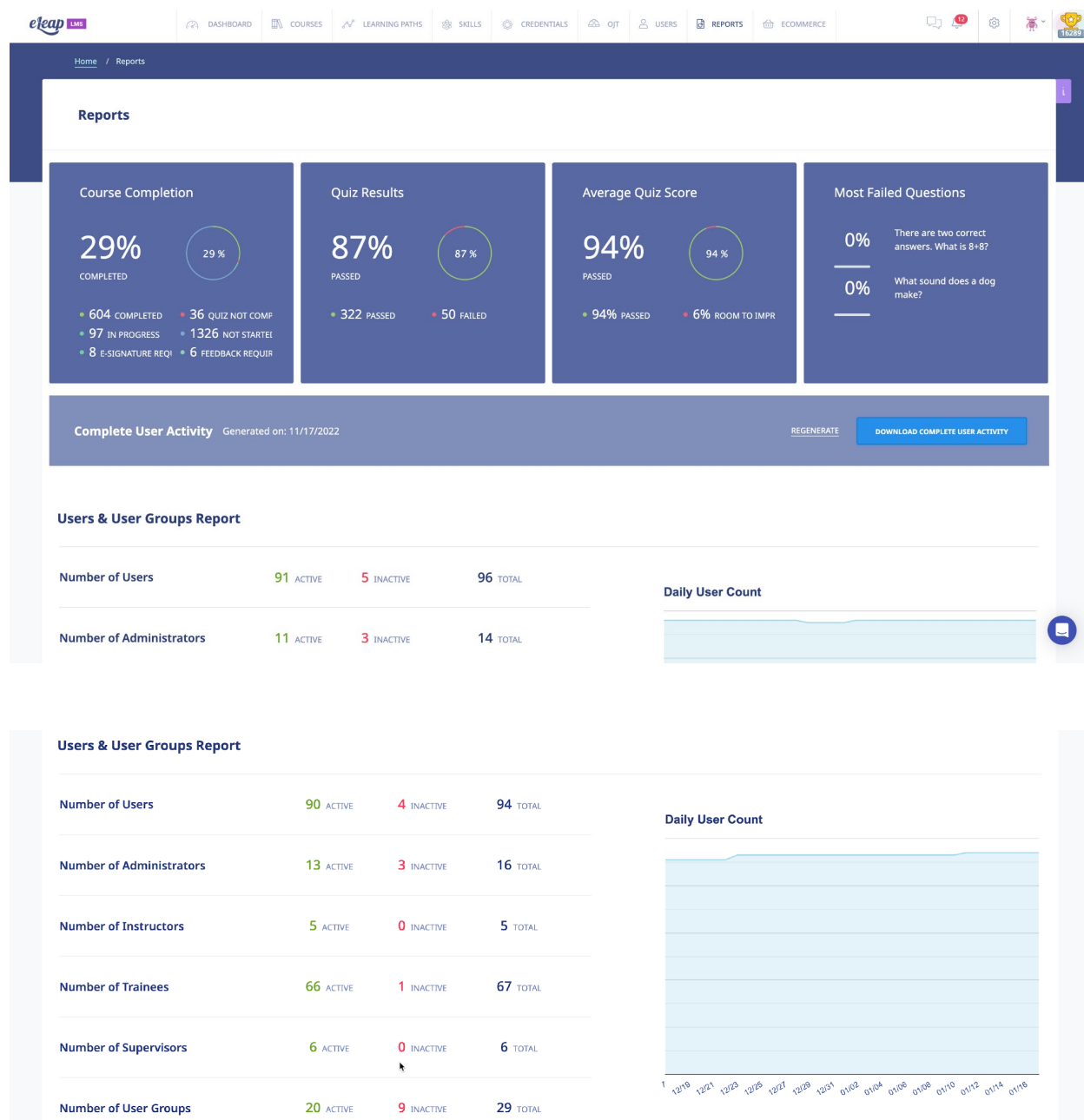
Are you sure?

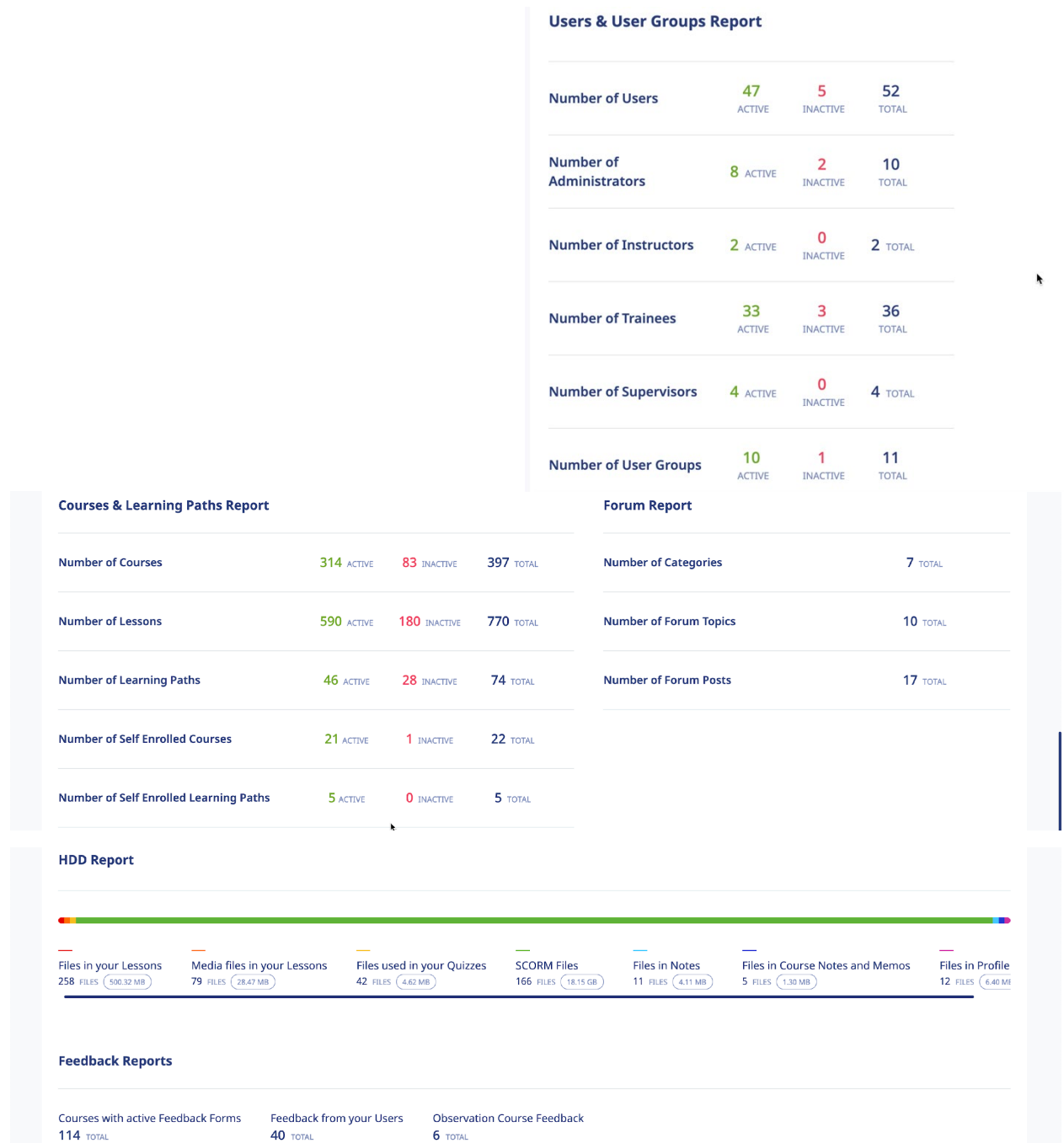
Cancel

OK

Reports

Selecting  **REPORTS** on the menu bar displays the **Reports** screen, illustrated below. In addition to graphic representations of your **Daily User Count**, **Course Completion Percentages** and **Quiz Results Percentages** shown across the top of the screen, there are also several Report Type statistics displayed over the rest of the screen. Those Report Types are covered over the next few pages of the document.





User and User Group Reports

The **Users and User Groups** portion of the screen displays statistics for and links to the following

Reports:

- Number of Users
- Number of Administrators
- Number of Instructors
- Number of Trainees
- Number of User Groups

Each Report Type displays the number of **Active**, **Inactive** and **Total** number of that User Type at the right-hand side of the screen.

Clicking a User Type Report's **Name** displays a **Registered User Type** screen for that Report Type. For example, clicking the **Number of Administrators** Report Type displays the **Registered Administrators** screen, as shown in the following illustration.

Additionally, you can select the **Download Complete User Activity** link to download all of the information contained within these reports to your computer as an Excel file.

Courses Reports

The **Course Reports** portion of the **Reports** screen displays statistics and links to the following Reports:

- Number of Courses
- Number of Lessons
- Number of Learning Paths

Each Report Type displays the number of **Active**, **Inactive** and **Total** number of that Course Type at the right-hand side of the screen.

Clicking a Course Report Type Report's **Name** displays the **Report Course Type** screen for that Report Type. For example, clicking the **Number of Training Reports** Report Type displays the **Learning Paths** screen, as shown in the following illustration.

Courses & Learning Paths Report

Number of Courses	152 ACTIVE	17 INACTIVE	169 TOTAL
Number of Lessons	230 ACTIVE	33 INACTIVE	263 TOTAL
Number of Learning Paths	27 ACTIVE	5 INACTIVE	32 TOTAL
Number of Self Enrolled Courses	30 ACTIVE	0 INACTIVE	30 TOTAL
Number of Self Enrolled Learning Paths	3 ACTIVE	0 INACTIVE	3 TOTAL

Forum Report

Number of Categories	7 TOTAL
Number of Forum Topics	5 TOTAL
Number of Forum Posts	7 TOTAL

Home / Reports / Learning Paths

Learning Paths

32 TOTAL LEARNING PATHS

[EXPORT TO EXCEL](#)

NO.	NAME	CREATED BY	DATE CREATED	TOTAL COURSES	INACTIVE COURSES	USERS	USER GROUPS	ACTIVE
1.	Pfizer	Sam, Pete	10/09/2017	3	0	3	1	⊗
2.	SR TP - Deadline Reminders	Sam, Pete	06/08/2021	4	0	1	1	⊗
3.	Senior Managers Package	Sam, Pete	11/11/2021	2	0	2	0	⊗
4.	New Hire Orientation	Cena, Jon	11/11/2021	2	0	0	0	⊗
5.	Sequence Training Software Program	Sam, Pete	09/29/2021	3	0	4	0	⊗
6.	A Path Forward	Sam, Pete	11/16/2021	3	0	4	1	⊗

Clicking the [EXPORT TO EXCEL](#) link allows you to export this information to a local drive on your computer, when necessary.

Forum Reports

The **Forum Reports** portion of the **Reports** screen displays statistics and links to the following Reports:

- Number of Forum Categories
- Number of Forum Topics
- Number of Forum Posts

Each Report Type displays the number of **Active**, **Inactive** and **Total** number of that Forum Type at the right-hand side of the screen.

Forum Report	
Number of Categories	5 TOTAL
Number of Forum Topics	4 TOTAL
Number of Forum Posts	8 TOTAL

Clicking a Forum Report Type Report's **Name** displays a **Report on** screen for that Report Type. For example, clicking the **Number of Forum Categories** Report Type displays the **Report on Forum Categories** screen, as shown in the following illustration.

Home / Reports / Forum Categories					
Report on Forum Categories			4 TOTAL FORUM CATEGORIES		
			EXPORT TO EXCEL		
NO.	NAME	DESCRIPTION	TOPICS	DATE CREATED	
1.	Jack Talks - Coaches	Coaches introduction forum.	1	02/05/2019	
2.	Senior VP	Area for senior VP convo	1	01/17/2019	
3.	A new way to talk about our plans	Come join the convo	1	10/19/2017	
4.	Let's talk about our Q3 Goals	Please join the conversation	1	04/26/2017	
			BACK TO REPORTS		

Clicking the [EXPORT TO EXCEL](#) link allows you to export this information to a local drive on your computer, when necessary.

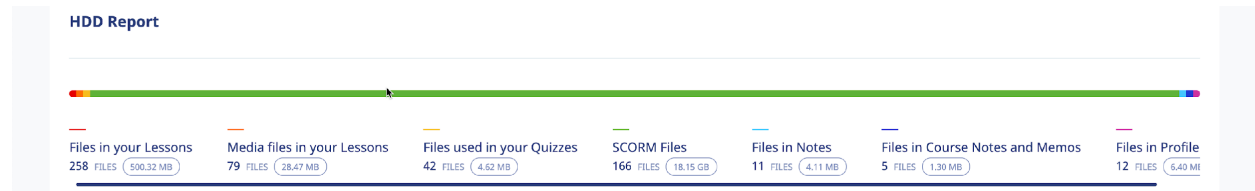
HDD Reports

The **HDD Reports** portion of the **Reports** screen displays statistics and links to the following Reports:

- Files in your Lessons
- Media Files in your Lessons
- Files used in your Quizzes
- SCORM Files

- Files in My Stuff
- Files in Course Notes and Memos
- Files in Profile Notes

Each Report Type displays the number of **Number of Files** and the **Space** taken up for that Forum Type at the right-hand side of the screen.



Clicking a Course Report Type Report's **Name** displays a **Report** screen for that Report Type. For example, clicking the **Files in your Lessons** Report Type displays the **Report: Files in your lessons** screen, as shown in the following illustration.

The screenshot shows the 'Multimedia Files in your Lessons' report screen. It features a table with the following columns: NO., FILENAME, LESSON'S TITLE, COURSE'S TITLE, FILE SIZE, and DELETE. There is an 'EXPORT TO EXCEL' link in the top right corner.

NO.	FILENAME	LESSON'S TITLE	COURSE'S TITLE	FILE SIZE	DELETE
1.	chunking1.png	Chunking	Micro Learning - How to Engage	176.92 kb	DELETE
2.	2017-03-13_1806.png	44 Years	Sales Training Seminar	124.48 kb	DELETE
3.	chunking1.png	Chunking	Sales Training Seminar	176.92 kb	DELETE
4.	2017-03-13_1806.png	44 Years	Micro Learning - How to Engage : DUPLICATE	124.48 kb	DELETE

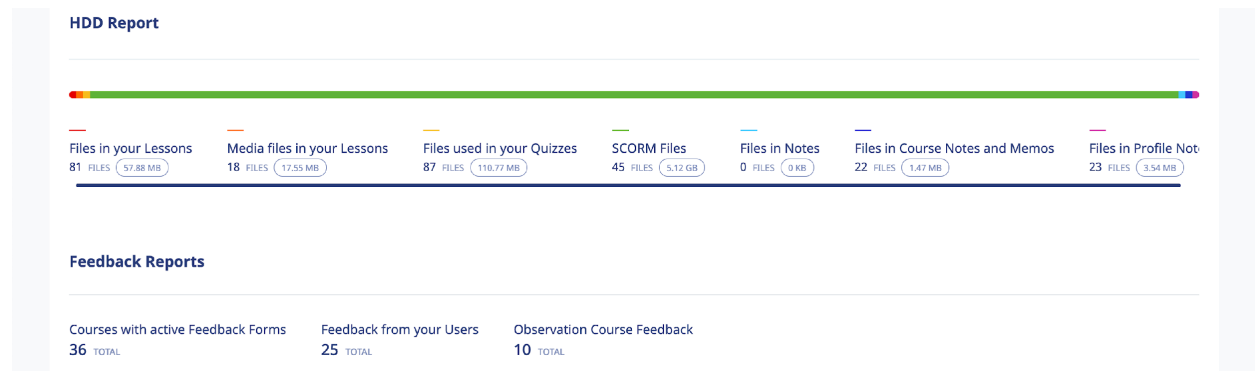
Clicking the [EXPORT TO EXCEL](#) link allows you to export this information to a local drive on your computer, when necessary.

Feedback Reports

The **Feedback** portion of the **Reports** screen displays statistics and links to the following Reports:

- Courses with Active Feedback Forms
- Feedback from your Users

Each Report Type displays the **Total** details for each Report Type at the right-hand side of the screen.



Clicking a Course Report Type Report's **Name** displays a **Report** screen for that Report Type. For example, clicking the **Courses with active Feedback Forms** Report Type displays the **Courses with active feedback** screen, as shown in the following illustration.

Feedback Reports (40 TOTAL FEEDBACK)

Select Course FILTER

	USER	DATE
1. Association Training 101	Dewey, Doris	12/25/2021
2. Week 1 of 5	Jones, Helen	08/19/2021
3. Orientation for New Hires to our company	Cranston, Kofi	07/27/2021
4. Feedback - not required	Walker, Alice	05/06/2021
5. Safety and Lifting Skills - SELF-ASSESSMENT	Walker, Alice	05/04/2021

Clicking the [EXPORT TO EXCEL](#) link allows you to export this information to a local drive on your computer, when necessary.

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

APPLY FILTERS

. You can also click the **access course** link within the **Action** column to access the eCommerce Course details.

Home

/

Ecommerce

/

Courses

ECommerce COURSES

YOUR ECATALOG

SALES REPORT

COMPLETION REPORT

REFERRERS

PROMO CODES

DISCOUNTS

CUSTOM FIELDS

eCommerce courses

Name

APPLY FILTERS

Your course will be available or listed on your website: <https://trainingprovider.eleapcourses.com/>

NO.	NAME	ORDER	TOTAL SALES	STATUS	DATE CREATED	ACTION
1.	Uploading PDF Tags: Test	↓	\$0.00	<div><div>✔ You have activated this Course</div><div>✖ eLeaP has activated this Course</div><div>✔ Course is ready to sell</div></div>	05/09/2018	ACCESS COURSE
2.	Sexual Harassment Prevention In New York Tags: Categorie test	↑↓	\$0.00	<div><div>✔ You have activated this Course</div><div>✖ eLeaP has activated this Course</div><div>✔ Course is ready to sell</div></div>	02/22/2019	ACCESS COURSE
3.	Live Oak Training 101 Tags: sdfasdf	↑↓	\$0.00	<div><div>✔ You have activated this Course</div><div>✖ eLeaP has activated this Course</div><div>✖ Course is ready to sell</div></div>		ACCESS COURSE
4.	Team building 101 : DUPLICATE Tags: vol, vol	↑↓	\$0.00	<div><div>✔ You have activated this Course</div><div>✔ eLeaP has activated this Course</div><div>✔ Course is ready to sell</div></div>	04/09/2019	ACCESS COURSE
5.	New Hire Orientation Course - Welcome Tags: Selling	↑	\$0.00	<div><div>✔ You have activated this Course</div><div>✖ eLeaP has activated this Course</div><div>✖ Course is ready to sell</div></div>		ACCESS COURSE

5 Total eCommerce Courses

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.

The screenshot shows the 'eCommerce COURSE DETAIL' configuration page for the course 'Sexual Harassment Prevention In New York'. The page has a top navigation bar with tabs: ECOMMERCE DETAIL, SALES REPORT, STUDENT USERS, COMPLETION REPORT, QUIZ RESULTS, SCORM RESULTS, and GRADING CENTER. The main content area is divided into two columns.

Left Column:

- I want to sell this course on my eLeaP e-catalog:** A checked checkbox.
- Category Tags:** A text box containing 'Sexual harassment, harassment, workplace harassment, new york,'.
- Description:** A rich text editor containing the text: 'The State of New York has a long history of protecting the rights of employees, as every employer in the state is required to have a zero-tolerance sexual harassment policy. Several laws, namely the New York Human Rights Law, Title VII of the Civil Rights Act, and the New York City Human Rights Law, protect employees as well. Managers and supervisors play a critical role under these laws, as their actions directly impact both a company's legal liability, as well as its culture. After all, an employer is strictly liable for sexual harassment committed by these individuals, or for harassment they failed to report, even if one was unaware of the harassment. This course explores the role of managers in sexual harassment prevention, while providing tips to help prevent sexual harassment in'.
- Pricing Model:**
 - Default Price per license:** A text box showing '\$ 10.00'.
 - Pricing Type:** Two radio buttons. 'Standard pricing' is selected (Simple pricing. No discount for multiple licenses). 'Multi license pricing' is unselected (Tiered or volume discounts for multiple licenses).
 - Eligible for Volume discount:** A toggle switch that is turned on.
- Extend Your Reach:**
 - Yes, I want this course to be available for purchase on the eLeaP e-learning catalog:** A toggle switch that is turned on. A link 'http://www.eleapcourses.com' is provided.
 - Yes, I am ready to sell this course:** A toggle switch that is turned on.
- Buttons:** 'SAVE ECOMMERCE SETTINGS' and 'CANCEL'.

Right Column:

- Image:** A placeholder image showing two people working.
- Upload picture:** A button 'Click to add file' and a link 'CHOOSE FILE'.
- Upload sample file:** A button 'Click to add file' and a link 'CHOOSE FILE'.
- File Upload:** A box showing a file named 'wallpaper1...' with a size of '572.79 KB' and a trash icon.

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** field.

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. To use the **Tiered** or **Volume** option, select the **Multi-license pricing** option.
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 [CHOOSE FILES](#) link to **upload sample file**. A sample file is a powerful marketing addition. eLeaP requires a course sample for display and marketing purposes. Samples can be in PDF format.
8. Click the [CHOOSE FILES](#) link to **upload picture** link to associate an image with the Course.
9. 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.
10. Click  to save your changes to the system.

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 and tagline to configure your eCatalog.

Home / eCommerce / Catalog

ECOMMERCE COURSES YOUR ECATALOG SALES REPORT COMPLETION REPORT REFERRERS PROMO CODES DISCOUNTS CUSTOM FIELDS

Your eCatalog

Edit the Help page of your catalog:


Edit information about your business/organization below:

Add/edit your own motto.

Footer text (large):

Footer text (small):

SAVE

1. Add information to be displayed on your Catalog Help page. This will help your customers get basic help and assistance. Of course, eLeaP provides your customers with customers service.
2. Add information about 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.
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. Click  to save your changes to the system.

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

APPLY FILTERS

NO.	COURSE	NO. OF LICENCES	NO. OF SALES	↑ TOTAL AMOUNT
1.	How to get started with us	83	1	\$73,787.00
2.	Create a sample title	11	1	\$0.00
TOTAL		94	2	\$73,787.00

2 Total Courses Sold
[BACK TO ECOMMERCE](#)

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.

Home / Ecommerce / How to Sell Software-as-a-Service (SaaS): Why your ... / Sales Report

ECOMMERCE DETAILSALES REPORTSTUDENT USERSCOMPLETION REPORTQUIZ RESULTSSCORM RESULTSGRADING CENTER

How to Sell Software-as-a-Service (SaaS): Why your current SaaS Strategy ...

EXPORT TO EXCEL

Name or Email

From

To

APPLY FILTERS

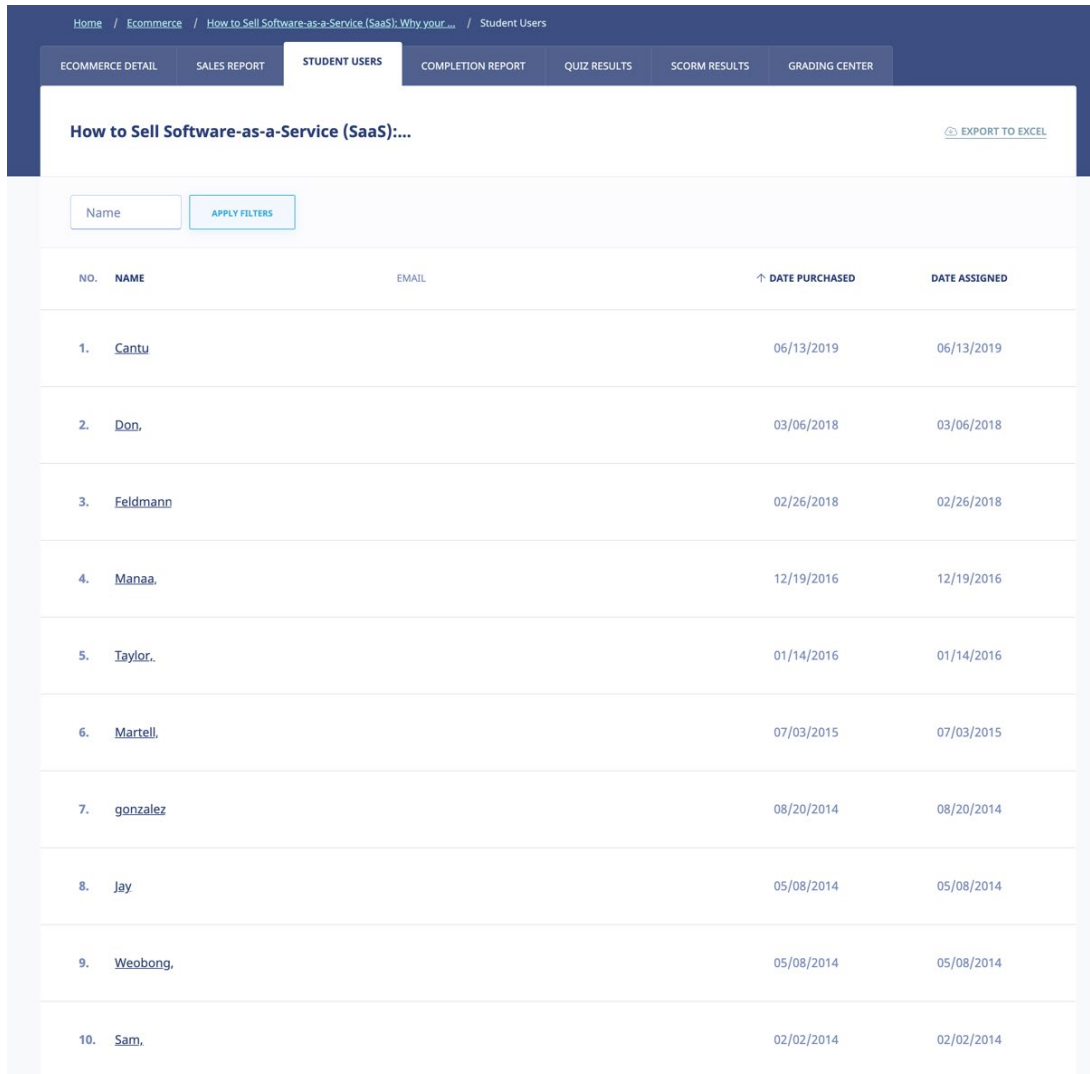
NO.	PORTAL	ORGANIZATION	FULL NAME	EMAIL	↑ DATE	NO. OF LICENCES	AMOUNT
1.	Course Portal				06/13/2019	1	\$79.95
2.	Course Portal		Don, "		03/06/2018	1	\$79.95
3.	Course Portal		Feldmann,		02/26/2018	1	\$79.95
4.	Course Portal		Manaa, Man	35d0fed7@opayq.com	12/19/2016	1	\$0.00
5.	Some Big Two		Jones, Peter	eleapm7@gmail.com	12/19/2016	1	\$0.00
6.	Course Portal		Taylor,		01/14/2016	1	\$79.95
7.	Telania Global				09/10/2015	1	\$0.00
8.	Course Portal		Martell,		07/03/2015	1	\$79.95

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.

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.



Home / Ecommerce / How to Sell Software-as-a-Service (SaaS): Why your... / Student Users				
ECOMMERCE DETAIL SALES REPORT STUDENT USERS COMPLETION REPORT QUIZ RESULTS SCORM RESULTS GRADING CENTER				
How to Sell Software-as-a-Service (SaaS):...				EXPORT TO EXCEL
Name APPLY FILTERS				
NO.	NAME	EMAIL	↑ DATE PURCHASED	DATE ASSIGNED
1.	Cantu		06/13/2019	06/13/2019
2.	Don,		03/06/2018	03/06/2018
3.	Feldmann		02/26/2018	02/26/2018
4.	Manaa,		12/19/2016	12/19/2016
5.	Taylor,		01/14/2016	01/14/2016
6.	Martell,		07/03/2015	07/03/2015
7.	gonzalez		08/20/2014	08/20/2014
8.	Jay		05/08/2014	05/08/2014
9.	Weobong,		05/08/2014	05/08/2014
10.	Sam,		02/02/2014	02/02/2014

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.

The screenshot displays the 'STUDENT USERS' tab in the eLeaP interface. At the top, a navigation bar includes 'ECOMMERCE DETAIL', 'SALES REPORT', 'STUDENT USERS' (active), 'COMPLETION REPORT', 'QUIZ RESULTS', 'SCORM RESULTS', and 'GRADING CENTER'. Below the navigation bar, the user's profile is shown with the title 'How to Sell Software-as-a-Service (SaaS): Why your current SaaS Strategy Won't Work' and the name 'Jay, Sam'. The profile fields include: First Name: Sam, Last Name: Jay, Email: prmdelast@gmail.com, and User Activity: Last Login: 05/08/2014. Under 'Assigned Courses', a table lists one course with a 100% completion status. A 'Completed Quizzes' section at the bottom indicates there are no completed quizzes.

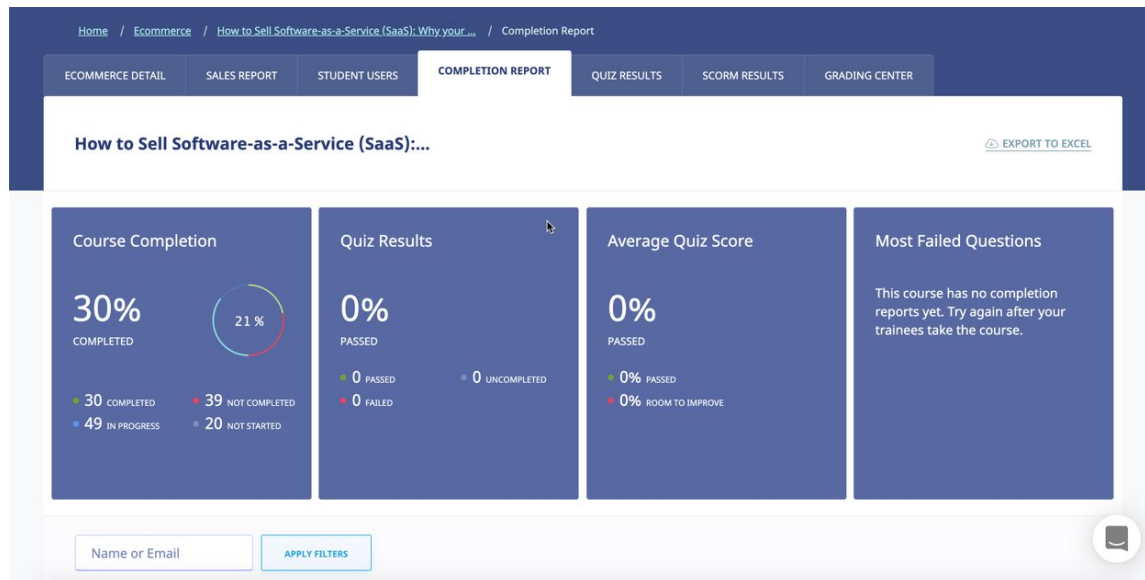
NO.	NAME	STATUS	DEADLINE	QUIZ	DATE COMPLETED	DATE ASSIGNED
1.	How to Sell Software-as-a-Service (SaaS): Why your current SaaS Strategy Won't Work	100% COMPLETED	none	N/A	05/08/2014	05/08/2014

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.

Completion Report

Selecting the [COMPLETION REPORT](#) tab 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.

NO.	NAME	ORGANIZATION	PROGRESS	QUIZ	QUIZ COMPLETED	DEADLINE
1.	Aanes,	Course Portal	50% IN PROGRESS	N/A	-	none
2.	al-jaar,	Course Portal	50% IN PROGRESS	N/A	-	none
3.	Alkharrat,	Course Portal	100% COMPLETED	N/A	-	none
4.	allegaert,	Course Portal	100% COMPLETED	N/A	-	none
5.	Barberis,	Course Portal	50% IN PROGRESS	N/A	-	none
6.	Baxter,	Course Portal	50% IN PROGRESS	N/A	-	none

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.

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.

Home / Ecommerce / Referrers						
ECOMMERCE COURSES YOUR ECATALOG SALES REPORT COMPLETION REPORT REFERRERS PROMO CODES DISCOUNTS CUSTOM FIELDS						
Referrers						
REFERRERS PERFORMANCE ADD NEW REFERRER						
Name APPLY FILTERS						
NO.	NAME	EMAIL	COMMISSION	KEY	DATE CREATED	ACTIVE
1.	Adams, Samuel	sam@captureleave.com	15.00 %	jabypys56lbbddznc2u3	11/15/2013	<input checked="" type="checkbox"/>
1 Total Referrers						

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.

Add Referrer

ADD NEW FIELDADD NEW CODE

KEY
4y9uvvtv5fb5bqfeot6i

First Name *

Last Name *

Email *

Phone *

Fax

Address

City

State/Region

ZipCode

Country

Web (including http://)


Commission(%) *

0

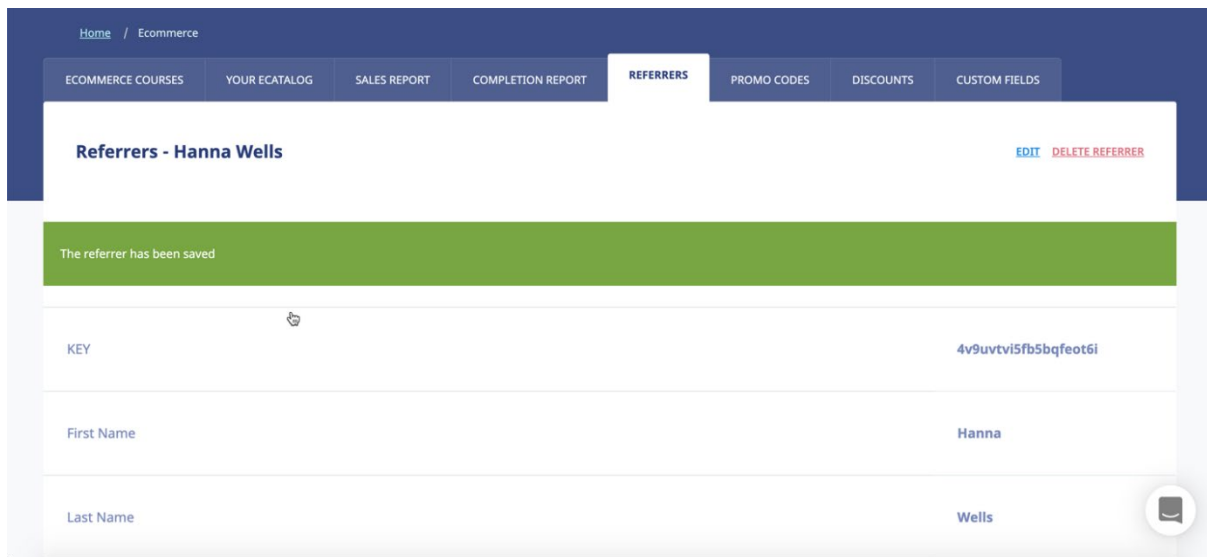
This Referrer will immediately be sent their login information via email.
Please make sure they have whitelisted office@eleapsoftware.com

SAVECANCEL

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  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.

The screenshot shows the 'Referrers' Performance' screen. At the top, there is a navigation bar with the following tabs: ECOMMERCE COURSES, YOUR ECATALOG, SALES REPORT, COMPLETION REPORT, REFERRERS, PROMO CODES, DISCOUNTS, and CUSTOM FIELDS. Below the navigation bar, the title 'Referrers' Performance' is displayed. A search bar with the placeholder 'Name' and an 'APPLY FILTERS' button is present. To the right of the search bar is a link 'Export to Excel'. The main table has the following columns: NO., NAME, EMAIL, COMMISSION, TOTAL AMOUNT, and REF.COM. The table contains one row with the following data: 1, Adams, Samuel, sam@captureleave.com, 15.00 %, \$0.80, and \$0.12. Below the table, it says 'Total Referrers: 1'.

NO.	NAME	EMAIL	COMMISSION	TOTAL AMOUNT	REF.COM.
1.	Adams, Samuel	sam@captureleave.com	15.00 %	\$0.80	\$0.12

Total Referrers: 1

The screenshot shows the 'Samuel Adams's Performance' screen. At the top, there is a navigation bar with the following tabs: ECOMMERCE COURSES, YOUR ECATALOG, SALES REPORT, COMPLETION REPORT, REFERRERS, PROMO CODES, DISCOUNTS, and CUSTOM FIELDS. Below the navigation bar, the title 'Samuel Adams's Performance' is displayed. A dropdown menu with the placeholder '- All Courses -' and an 'APPLY FILTERS' button is present. To the right of the dropdown menu is a link 'EXPORT TO EXCEL'. The main table has the following columns: NO., COURSE, ORDER DATE, ORGANIZATION, FULL NAME, CLIENT'S EMAIL, AMOUNT, COMM., and REF.CUT. The table contains two rows with the following data: 1, How to Sell Software-as-a-Service (SaaS): Why your current SaaS Strategy Won't Work, 11/15/2013, Course Portal, Ecom Test User, Don, ecomuser2@eleapsoftware.com, \$0.80, 15.00 %, and \$0.12; 2, How to Sell Software-as-a-Service (SaaS): Why your current SaaS Strategy Won't Work, 11/15/2013, Course Portal, Ecom Test User, Don, ecomuser2@eleapsoftware.com, \$0.00, 15.00 %, and \$0.00. Below the table, it says '2 Total Referrers'. At the bottom right, there is a link '< BACK TO REFERRERS' PERFORMANCE'.

NO.	COURSE	ORDER DATE	ORGANIZATION	FULL NAME	CLIENT'S EMAIL	AMOUNT	COMM.	REF.CUT
1	How to Sell Software-as-a-Service (SaaS): Why your current SaaS Strategy Won't Work	11/15/2013	Course Portal	Ecom Test User, Don	ecomuser2@eleapsoftware.com	\$0.80	15.00 %	\$0.12
2	How to Sell Software-as-a-Service (SaaS): Why your current SaaS Strategy Won't Work	11/15/2013	Course Portal	Ecom Test User, Don	ecomuser2@eleapsoftware.com	\$0.00	15.00 %	\$0.00

2 Total Referrers

< BACK TO REFERRERS' PERFORMANCE

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	John Doe	john.doe@company.com	15	100	15.00
3	2	Jane Smith	jane.smith@company.com	15	200	30.00
4	3	Mike Lee	mike.lee@company.com	20	150	30.00
5	4	Anna Company	anna@company.com	50	250	125.00
6						

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.

NO.	PROMOTIONAL CODE	DISCOUNT	QUANTITY	EXPIRATION DATE	INSERT DATE	ACTIVE
1.		100.00 % off price	(0 / 5)	09/11/2015	03/18/2014	<input checked="" type="checkbox"/>
2.	Half Off	50.00 % off price		01/30/2011	10/06/2010	<input checked="" type="checkbox"/>
3.	htss	100.00 % off price	(0 / 40)	12/31/2016	12/19/2016	<input checked="" type="checkbox"/>
4.	new	99.00 % off price	(0 / 5)	11/29/2013	01/19/2011	<input checked="" type="checkbox"/>
5.		99.00 % off price		05/27/2011		<input checked="" type="checkbox"/>


5 Total Codes
< BACK TO ECOMMERCE

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.

1. Enter a name for the new Promotional Code in the **Promotional Code** field.
2. Choose if the Promotional Code applies to Courses, Learning Paths or both
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  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  to save your changes to the system.

Promotional Codes

ID	Promotional Code
1	09W123
2	1107120
3	1033
4	7080
5	000000

Edit Promotional Code

Promotional Code

abba2134

Applies To

Courses

Value Of Discount

100.00

% Off Standard Price

Quantity

5

Leave Empty For Unlimited

Expiration Date

09/25/2019

SAVE

CANCEL

ACTIVE

100%

ACTIVE

100%

ACTIVE

100%

ACTIVE

100%

ACTIVE

100%

ACTIVE

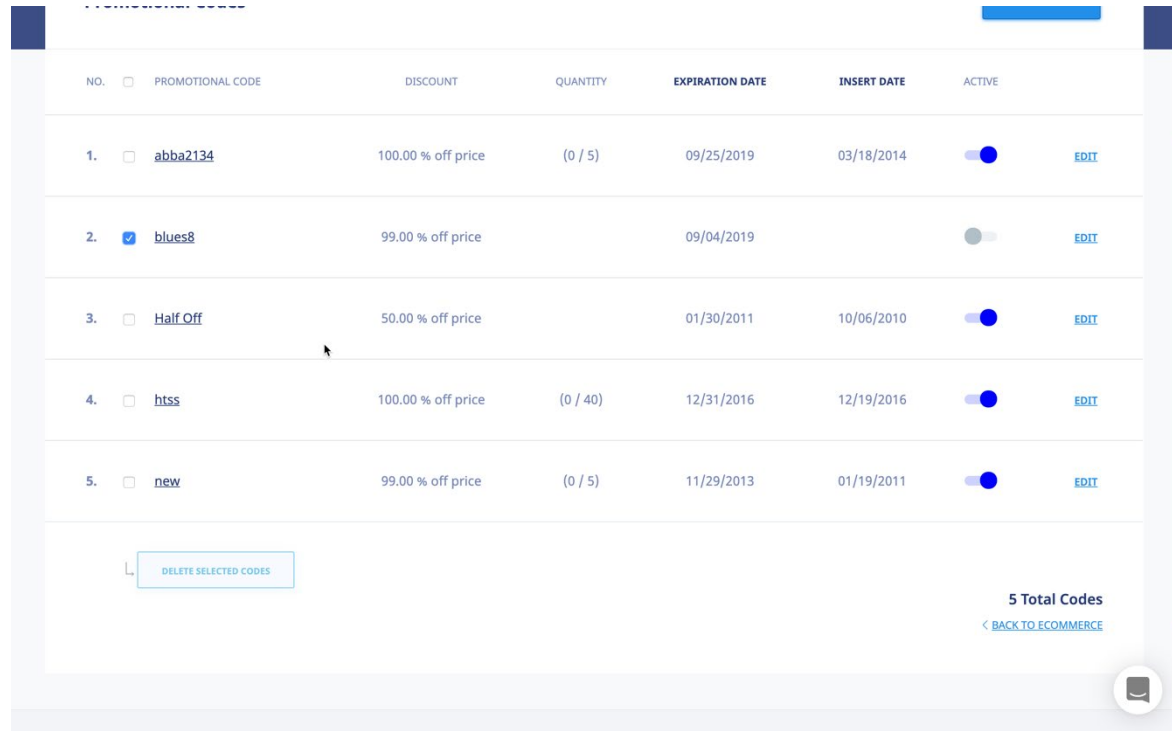
100%

ACTIVE

100%

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.



NO.	PROMOTIONAL CODE	DISCOUNT	QUANTITY	EXPIRATION DATE	INSERT DATE	ACTIVE	
1.	<input type="checkbox"/> abba2134	100.00 % off price	(0 / 5)	09/25/2019	03/18/2014	<input checked="" type="checkbox"/>	EDIT
2.	<input checked="" type="checkbox"/> blues8	99.00 % off price		09/04/2019		<input type="checkbox"/>	EDIT
3.	<input type="checkbox"/> Half Off	50.00 % off price		01/30/2011	10/06/2010	<input checked="" type="checkbox"/>	EDIT
4.	<input type="checkbox"/> htss	100.00 % off price	(0 / 40)	12/31/2016	12/19/2016	<input checked="" type="checkbox"/>	EDIT
5.	<input type="checkbox"/> new	99.00 % off price	(0 / 5)	11/29/2013	01/19/2011	<input checked="" type="checkbox"/>	EDIT

[DELETE SELECTED CODES](#)

5 Total Codes
[< BACK TO ECOMMERCE](#)

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.

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 <https://www.eleapsoftware.com/support/>

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.
- **Online Support:** Do you have a particular question or need help with a feature in eLeaP? Use the onboard support system to get help anytime.
- **Downloads:** If you need special reports, White Papers, or even user guides or manuals, access our Downloads section to get this material.
- **News:** Visit our news section to learn about the 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™.