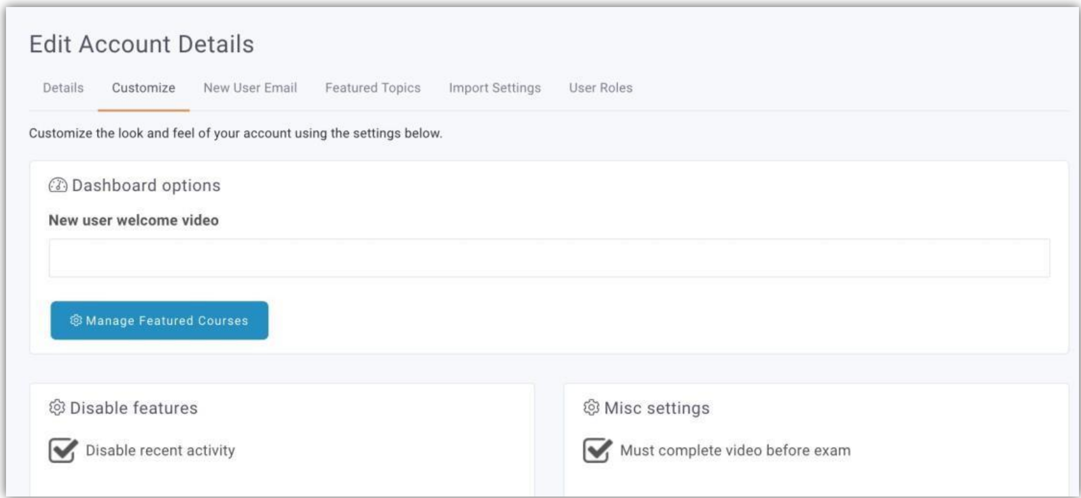
Process Quick Guide for Administrators/Instructors

Customization

If you need to customize the dashboard, click on **Administration** from the main menu and select **Campus Settings** from the drop-down options. Then click on the **Customize** tab to open up a number of options.



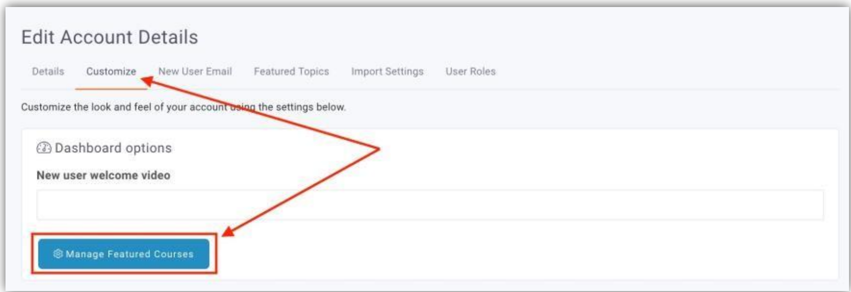
Everything from disabling certain features such as, comments or sending messages, requiring Students/Learners (Users) to complete the video before taking the exam, creating customized welcome emails for new Students/Learners (Users), to uploading your own image for the login page, can all be found here.

Managing Featured Courses

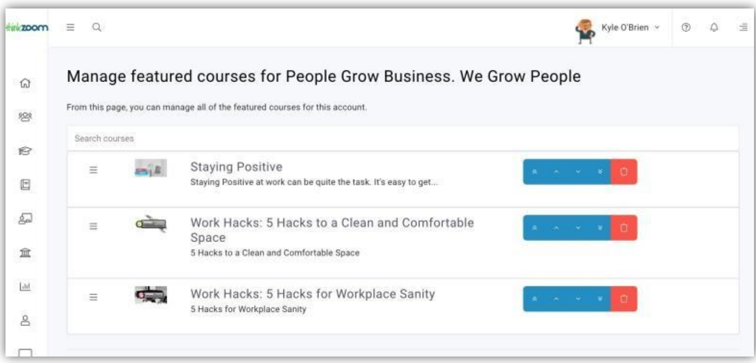
Featured Courses is just one of many widgets that can be added to the main dashboard. First, you need to add courses.

To do so, click on **Administration** from the main menu and select **Campus Settings** from the drop-down options. This will take you to **Account Details**.

Choose the **Customize** tab and then select **Manage Featured Courses**.



This will redirect you to another page to either add, remove or reorder the featured courses. To add courses, use the **Search courses** field to find and add courses to the page.



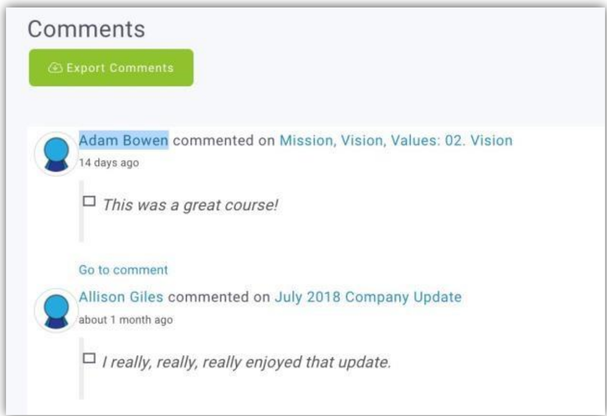
If you need to remove a course, click the red trash bin icon to the right of the course title. To reorder the courses, use the blue up/down arrows. Once you're satisfied, return to the main dashboard and find the **Featured** section to see your updates.

If you do not have the **Featured Courses** widget already added to the dashboard, click the gray **Add Widget** button in the top right-hand corner, select **Courses,** then **Featured**, and choose what size of the widget you want displayed.

(Please note that if you use the **Featured Courses** widget it will default as the top widget on the Students/Learners (Users) dashboard).

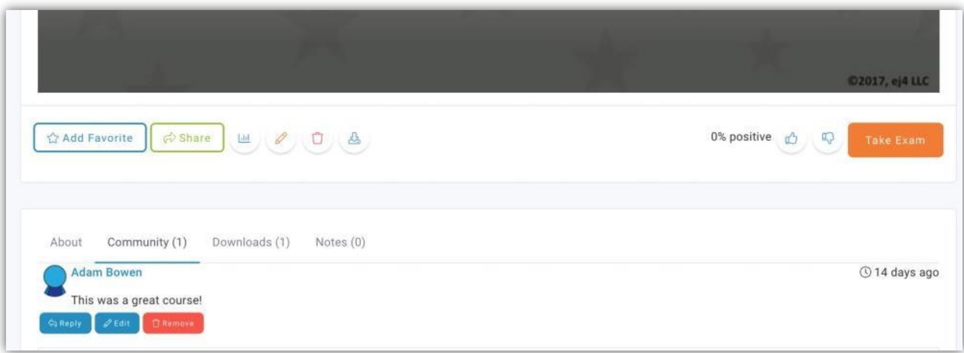
Comment Moderation

To view and manage comments made by Students/Learners (Users), click on **Administrator** and choose **Comment Moderation** from the drop-down options.



This page gives you a complete history of Students/Learners (Users) comments. To download all comments for your archives, click the green **Export Comments** button.

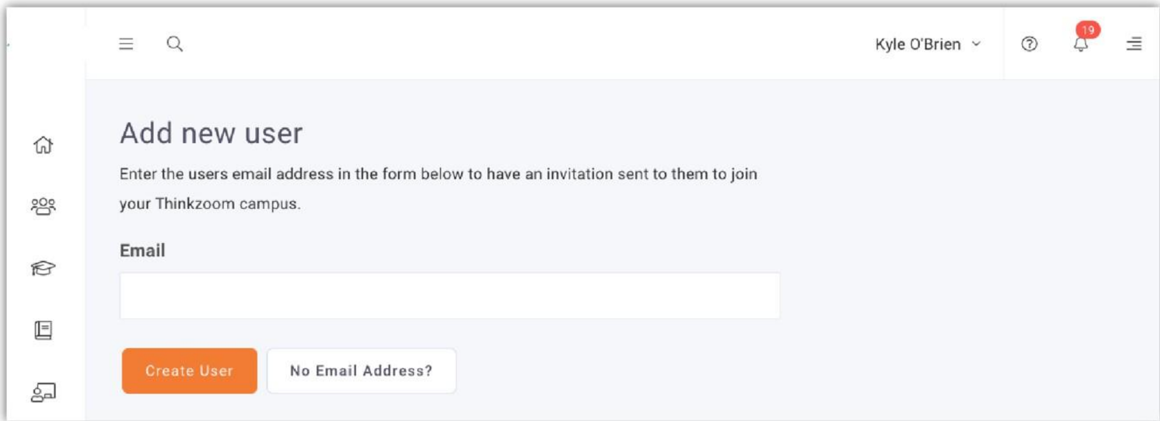
To view individual comments, click the blue **Go to comment** link and you'll be directed to the course page where the comment was made.



From there you'll have the option to **Edit**, **Reply** or **Remove** the comment.

Adding Students/Learners (Users) to KT&RS Software

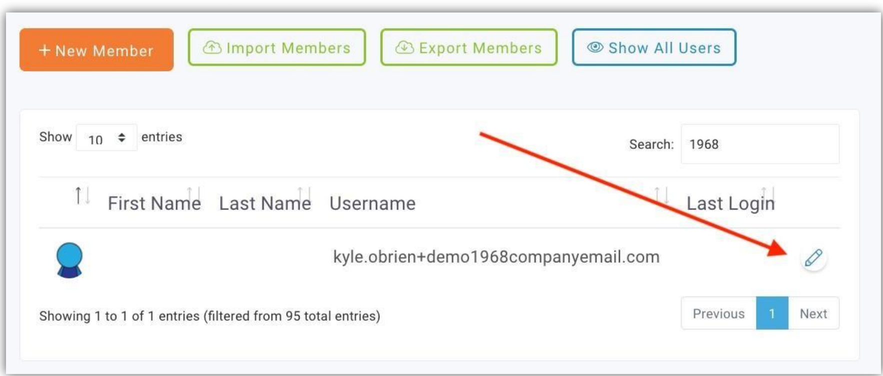
You have a few options when it comes to adding Students/Learners (Users) to your KT&RS Software account. The first option is just creating an individual Students/Learners (Users). To do so, click **Members** from the main menu and then select **Create new Students/Learners** (Users) from the drop-down options. This will take you to this page:



Enter in the email address of the new Students/Learners (Users) and click **Create Students/Learners** (Users)**.**

(Shortly after, the Students/Learners (Users) will receive a confirmation email where they'll need to complete the steps to confirm their account and create a password to log into your KT&RS Software account.)

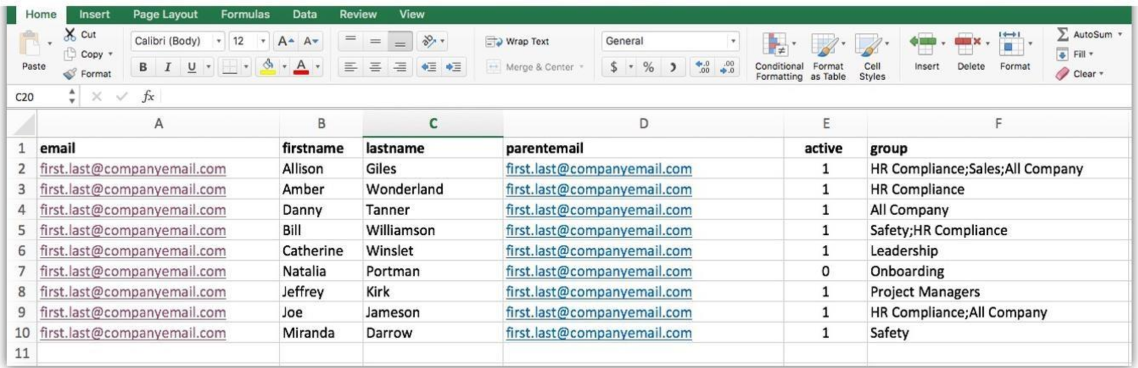
After you've created the new Students/Learners (Users), you will be redirected to the main **Members** page. Use the search bar to find the new Students/Learners (Users). Need to edit their profile? Click the blue pencil icon across from their name to open up their profile and edit their attributes or grant them privileges.



The other way to add Students/Learners (Users) to KT&RS Software is via importing a file, this is how you can add multiple Students/Learners (Users) at once. First, you will need to create your Excel file with all of the Students/Learners (Users) you want to add.

To make the process easier, we have templates for this.

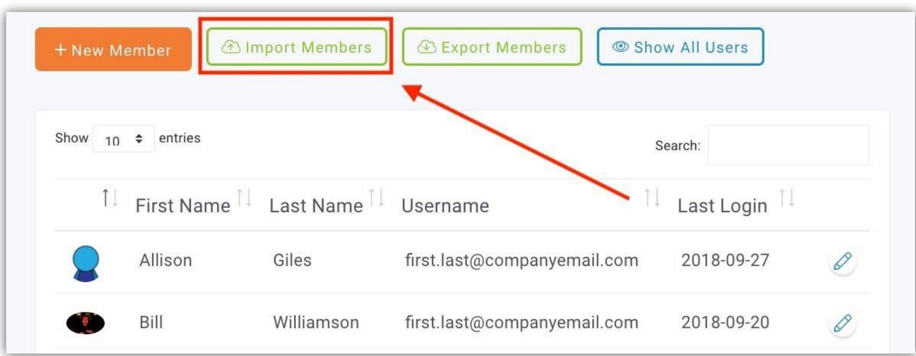
Your file should have a column for the Students/Learners (Users) name, first and last name, the parent email of their manager or administrator for reporting purposes, whether or not they're active (enter in 1 for every Students/Learners (Users) you want to activate and 0 for every Students/Learners (Users) you want to deactivate), and other attributes, such as what Group you want to add them to.



	A	B	C	D	E	F
1	email	firstname	lastname	parentemail	active	group
2	first.last@companyemail.com	Allison	Giles	first.last@companyemail.com	1	HR Compliance;Sales;All Company
3	first.last@companyemail.com	Amber	Wonderland	first.last@companyemail.com	1	HR Compliance
4	first.last@companyemail.com	Danny	Tanner	first.last@companyemail.com	1	All Company
5	first.last@companyemail.com	Bill	Williamson	first.last@companyemail.com	1	Safety;HR Compliance
6	first.last@companyemail.com	Catherine	Winslet	first.last@companyemail.com	1	Leadership
7	first.last@companyemail.com	Natalia	Portman	first.last@companyemail.com	0	Onboarding
8	first.last@companyemail.com	Jeffrey	Kirk	first.last@companyemail.com	1	Project Managers
9	first.last@companyemail.com	Joe	Jameson	first.last@companyemail.com	1	HR Compliance;All Company
10	first.last@companyemail.com	Miranda	Darrow	first.last@companyemail.com	1	Safety
11						

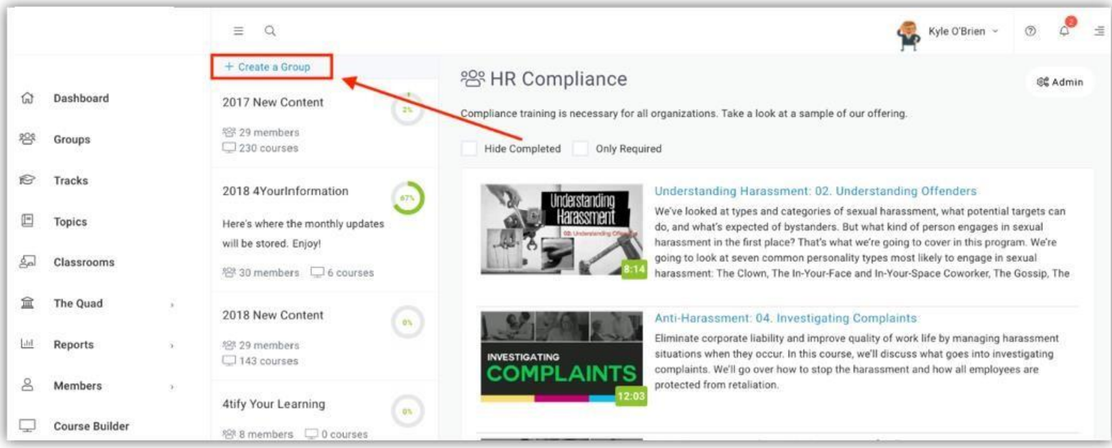
Once you're done, save the Excel file and return to the main **Members** page.

Click the green **Import Members** button, upload your Excel file and click **Import Students/Learners** (Users) to complete the process.



Creating and Managing Groups

To set up your Students/Learners (Users) into specific Groups, click on **Groups** from the main menu. Next, look for and click the blue link that says **+ Create a Group**.



A pop-up window will appear asking you to name your new Group and provide a description. Once you've done that, click the orange **Create Group** button and the page will refresh to your new page.

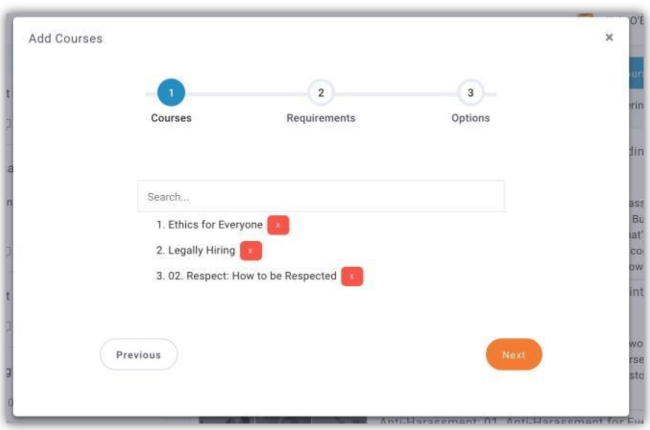
Now it's time to add Students/Learners (Users) and courses. Let's start with adding

courses.

Adding Courses to a Group

Go back to the **Admin** button and choose **Manage Courses** from the drop-down menu. The page will refresh to show two buttons, **Add Courses** and **Done Editing**.

Click **Add Courses** to open up a pop-up window. Adding courses is a quick three step process.



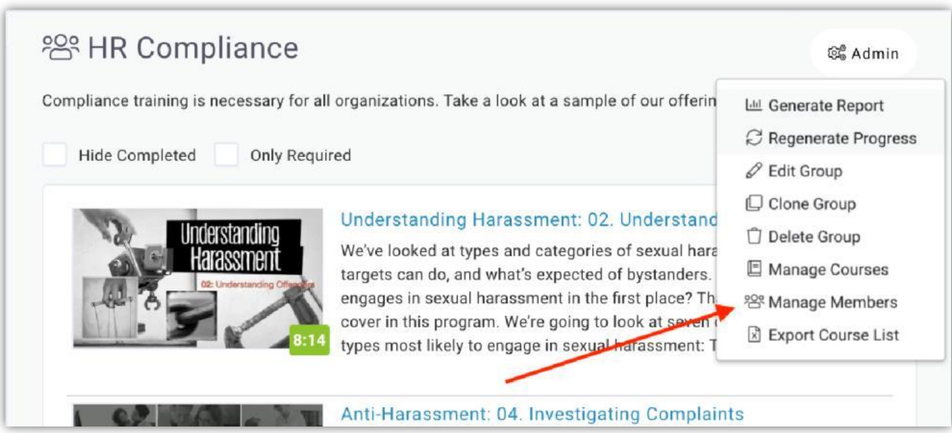
First, use the search bar to add the courses you want (you can add multiple courses at once or even add an entire topic or series of courses!). To remove a course, click the red "x" button next to the course title.

The second step is optional and only there if you want to make the course(s) all required viewing by your Students/Learners (Users).

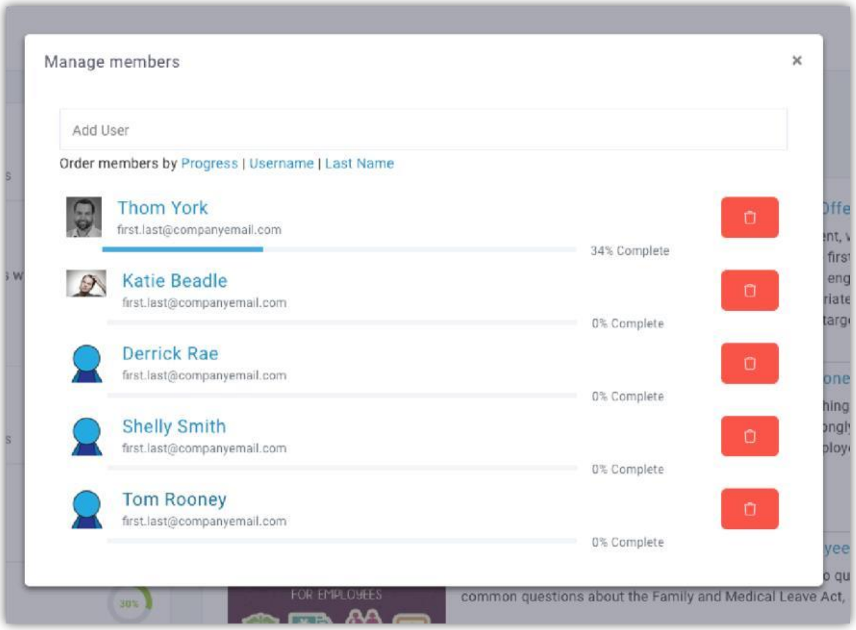
The third and final step is to decide how you want these courses to appear. By default, any new course additions to a Group will appear at the top. If you want them to appear at the very end, you will need to check the box in this step that says, **Add courses to end of list.**

Adding Students/Learners (Users) to a Group

Click the **Admin** button and select **Manage Members** from the drop-down options to trigger a pop-up menu.



In the pop-up menu, search for and add Students/Learners (Users) by their Students/Learners (Users) name or by their first or last name. You can remove Students/Learners (Users) from this Group by clicking the red trash bin across from their name.



Any additions or changes will save in real time.

Manage Members allows you to see the current progress of the Students/Learners (Users) in the group. You can click on a member's name to see what training they have completed and what they still need to take.

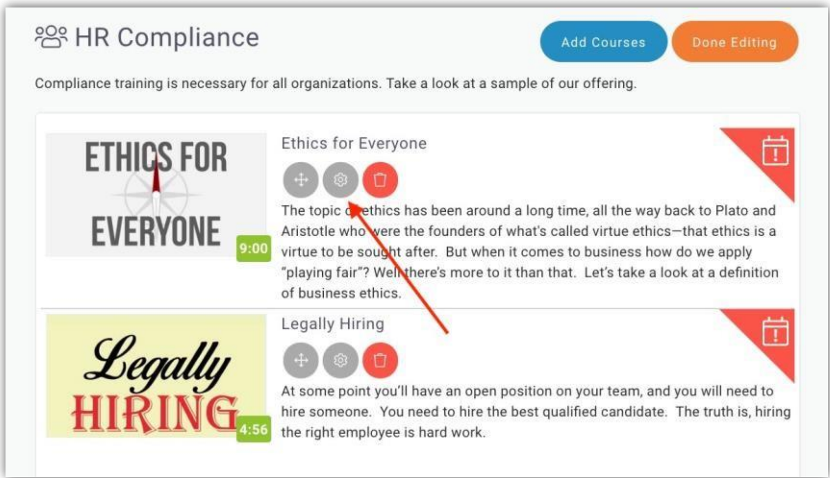
When you're done, exit out of the menu. Now it's time to add courses to this Group.

Once you're satisfied hit **Save Courses** and then click **Done Editing** to save all your changes.

Requiring Courses in a Group

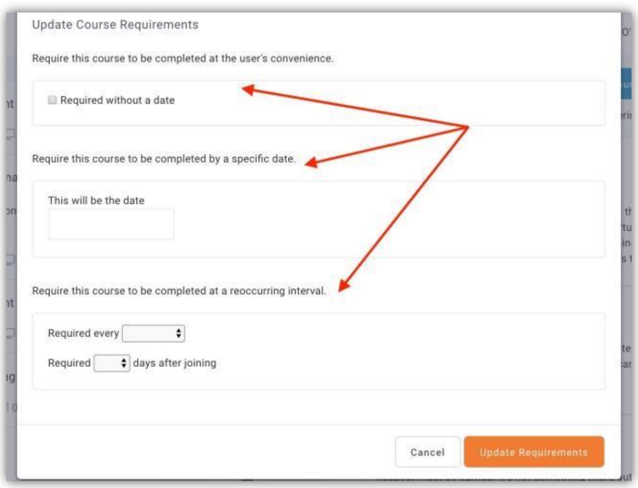
Within every Group page, you have the ability to set **Required Courses** where learners will be notified on their main dashboard that a course must be watched by a specific date.

To set a course requirement, click **Admin** and select **Manage Courses** from the drop-down options. After the page refreshes, you will notice three editing icons underneath the course titles. The gray gear icon in the middle is what you will select to bring up the course requirements options.



You have three different ways to set course requirements:

- **Require without a date**
- **Require course to be completed by a specific date**
- **Require course to be completed at a reoccurring interval**



If you just want the course to be required without a date, check the box.

If you want courses to be completed by a specific date, choose the date from the drop-down calendar.

If you want requirements to be recurring, you can choose whether a course must be viewed every 6 months to 3 years, or you can require it to be viewed by a certain amount of days after joining the Group.

Once you're done, click **Update Requirements** and then **Done Editing** to save your changes.

Required courses will have these indicators in the top-right corner of the course section.

Red indicates a course is past due, a blue mark indicates the course is required and green indicates the course has been completed by the Students/Learners (Users).

Along with adding Students/Learners (Users) and courses, there are other options under the **Admin** dropdown menu:

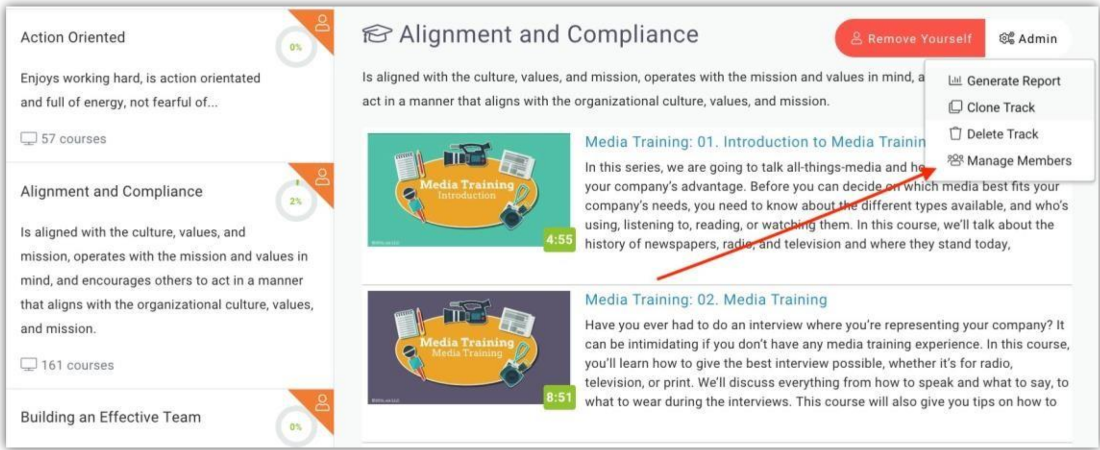
- **Generate a Report**: Create a custom report on the Students/Learners (Users) in the group and the courses in the group.
- **Regenerate Progress**: Update an employee's progress wheel.
- **Clone Group**: Make a clone of this Group with the same courses but different Students/Learners (Users).
- **Delete Group**: Remove this Group from your KT&RS Software account.

Creating and Managing Tracks

KT&RS Software comes standard with **Tracks**, a way for you and your Students/Learners (Users) to engage with self-directed learning off of the Lominger competencies. Not only can you enroll Students/Learners (Users) into any Track you desire, but Students/Learners (Users) can also enroll themselves without needing administrative privileges.

To access a Track, click **Tracks** from the main menu and then choose a Track.

To enroll or unenroll a Students/Learners (Users) from this Track, click on **Admin** and select **Manage Members**.



A pop-up window will appear where you can search and add new Students/Learners (Users), remove current Students/Learners (Users) and more.

If you want to create a custom Track, click the blue link labeled **Create a Track**.

Give your Track a name and a description and then once it's created go to **Admin** and select **Manage Courses** to add in the courses you'd like to associate with the Track.

You can also customize existing Tracks by clicking on **Clone Track**. This will not create a new Track but rather it will unlink the Track from our library. This means any new courses added to this Track in the future will not be included on this cloned Track. However, you can customize it to remove any courses and add any of your own.

Lastly, you have the ability to generate a custom report on this specific Track. Go to **Admin** again and select **Generate Report** from the drop-down options. You'll be redirected to the **Reports** page to fill in the rest of the reporting options.

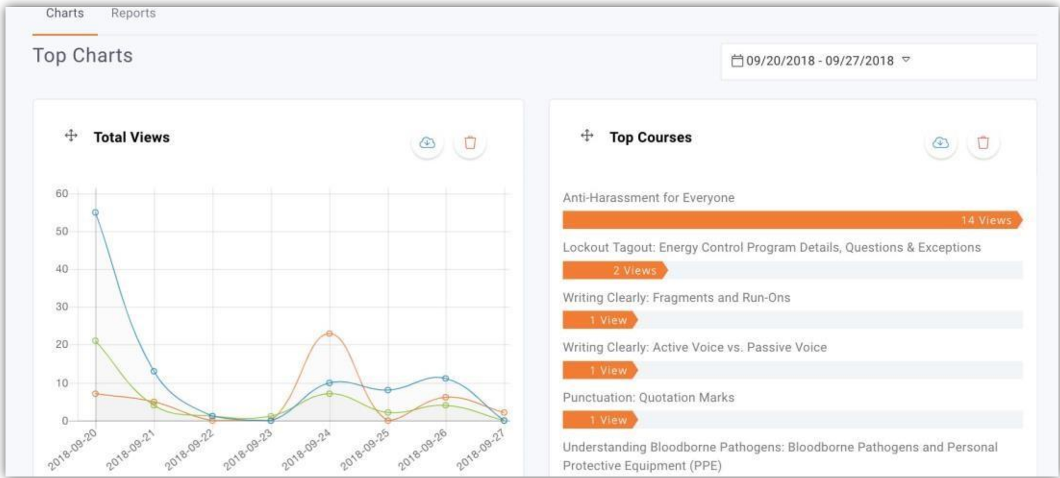
Classrooms

KT&RS Software supports instructor-led training via **Classrooms**. As an administrator, you have the ability to create classroom courses, set up sessions, manage and track registered Students/Learners (Users) and more.

For an in-depth look at how to create classrooms, sessions and manage registrants, please request a demo at lifecareerprep.com

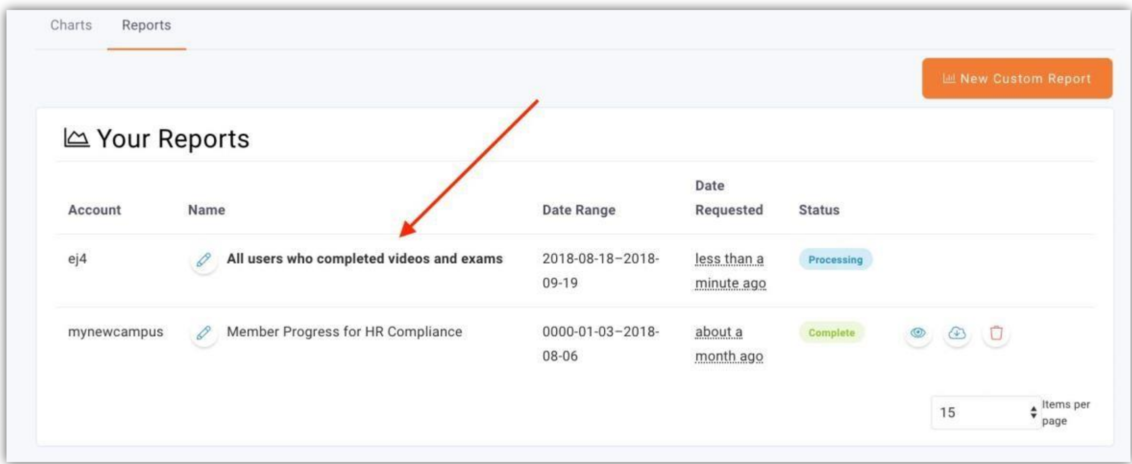
Reporting Features

Select **Reports** from the main menu to go to this page, where you'll be able to see the activity of the entire Students/Learners (Users) base with **Charts**.



You'll find everything from **Top Topics**, **Top Students/Learners** (Users), **Top Courses**, **Top Favorites**, **Top Recommendations** and **Total Views**.

You'll also be able to access usage reports in the **Reports** tab. Here you can find past reports, as well as build your own custom reports.



For more details on creating custom reports request a demo at lifecareerprep.com.com

For more details on creating charts request a demo at lifecareerprep.com.com

Creating Custom Content

KT&RS Software comes with its own authoring tool to help you create your own custom content. To get started, click **Course Builder** from the main menu and then select **Make a Recording** from the available options of creating and/or uploading content.

For a step-by-step look at creating custom content request a demo at lifecareerprep.com.com

Advanced Recording Features

Now there's more under the hood of the authoring tool for those who want to learn how to build content using the **Scripted Recordings** feature, or learn about advanced editing tools such as adding overlays, creating transitions, replacing sections of content and more with the **Editing Suite**.

For more information on Scripted Recordings and The Editing Suite request a demo at lifecareerprep.com.com

Questions?

For more assistance with your KT&RS Software account, visit lifecareerprep.com FAQs or reach out to our friendly support team of Transformation Consultants as they are here to answer any questions you have as well.