

# LMS GUIDE

eloomi.com — 2018





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# INTRODUCTION

This guide will help you get started with Learning Management System in eloomi.

The guide focuses on setting up modules, add content, and create programs. In addition you will learn how to create an onsite course.

# SKILLS & CATEGORIES

# CREATE SKILLS & CATEGORIES



## PRO-TIP

Before we get started with creating content (modules and programs) you should consider the areas or themes which your content will revolve around.

This is what we call the "Hygiene Factors" and includes both Skills and Categories. It is always a good idea to create both of these before you actually start creating the content

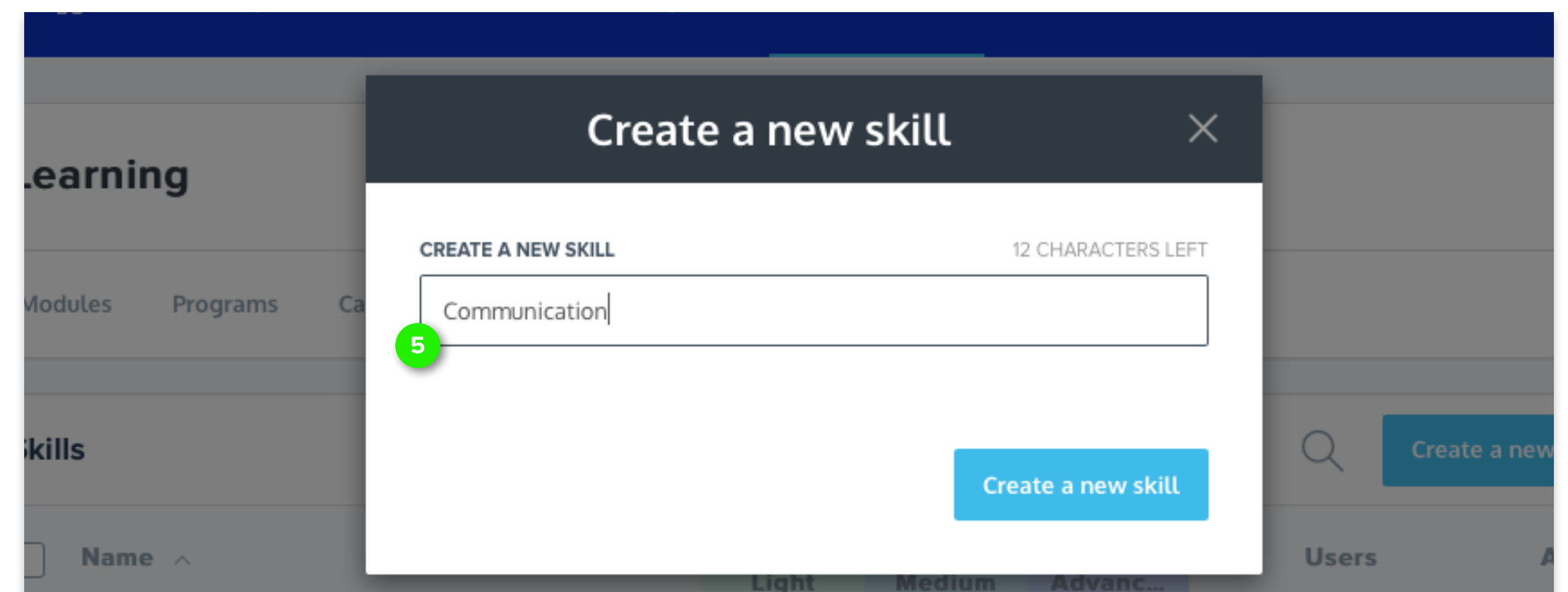
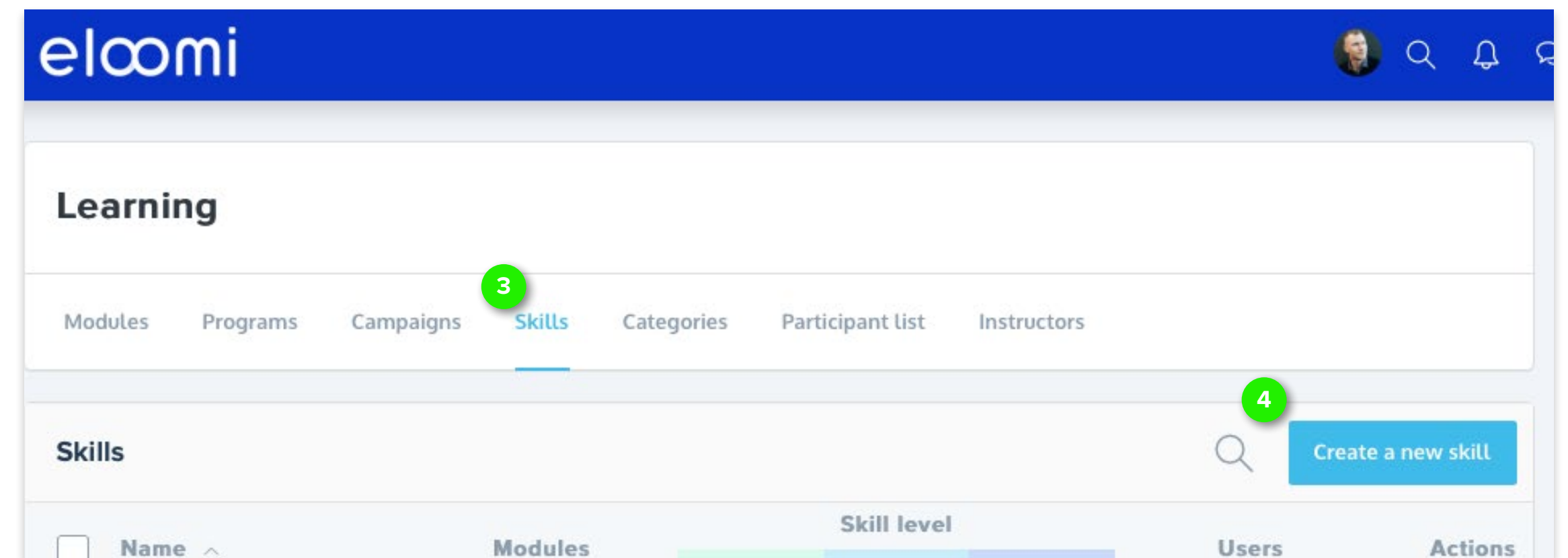
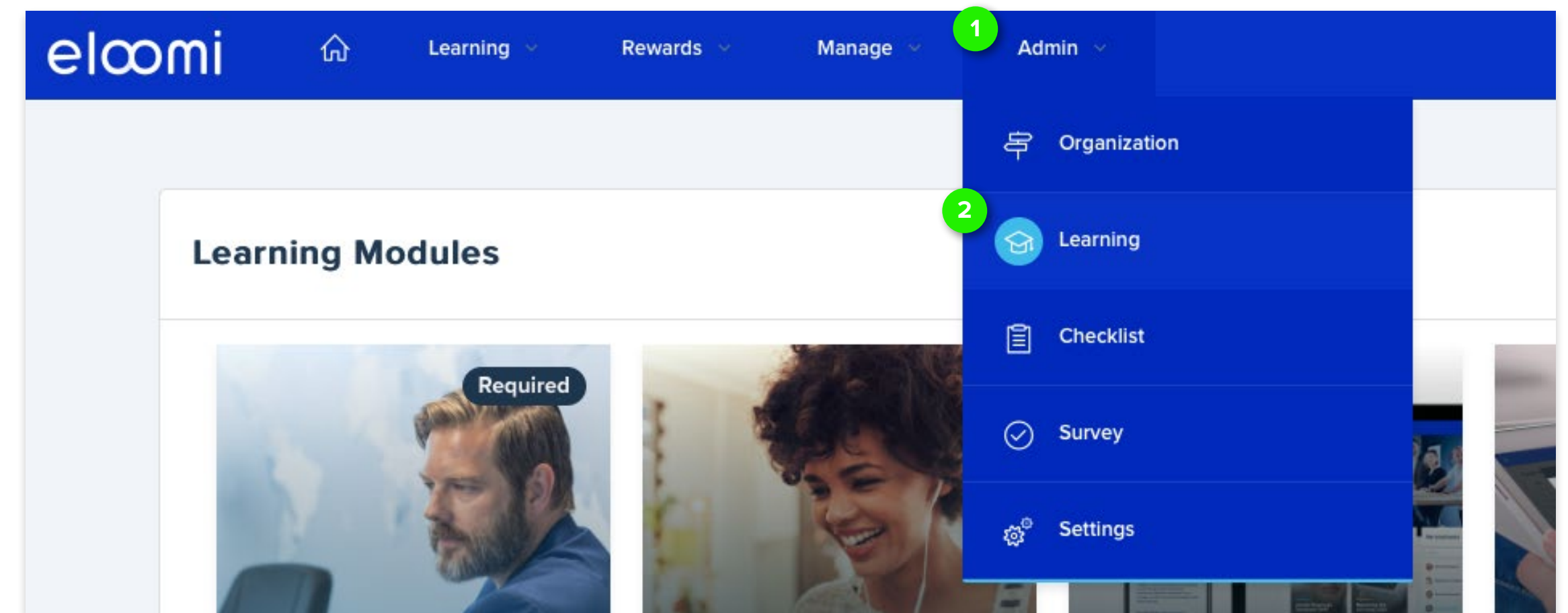
# CREATE SKILLS

- 1) Go to: **1 Admin** ----> **2 Learning** ----> **3 Skills**
- 2) Click on **4 Create a new skill**
- 3) Enter **the name** of a skill **5**



## NOTE:

You can also create a Skill while creating/editing a module as well.



# CREATE A CATEGORY

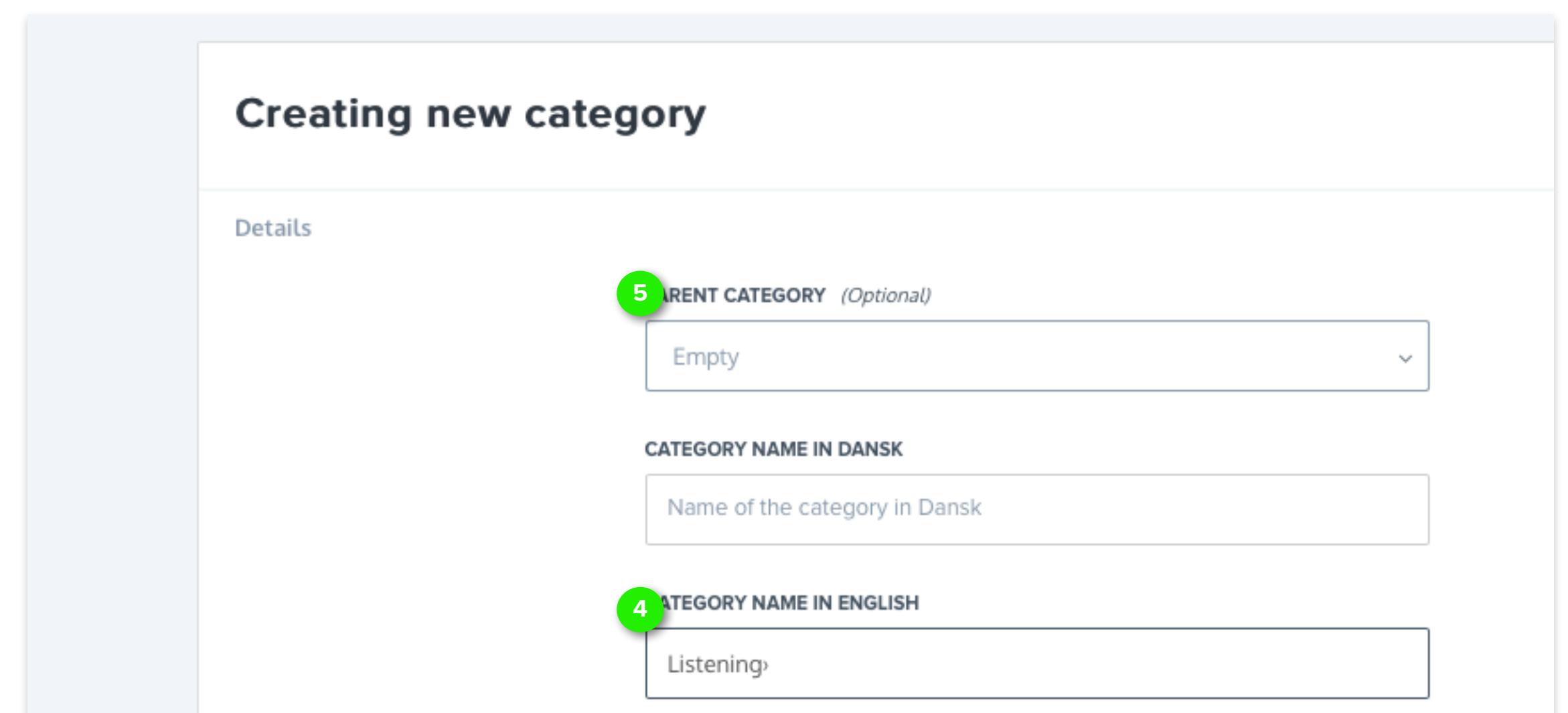
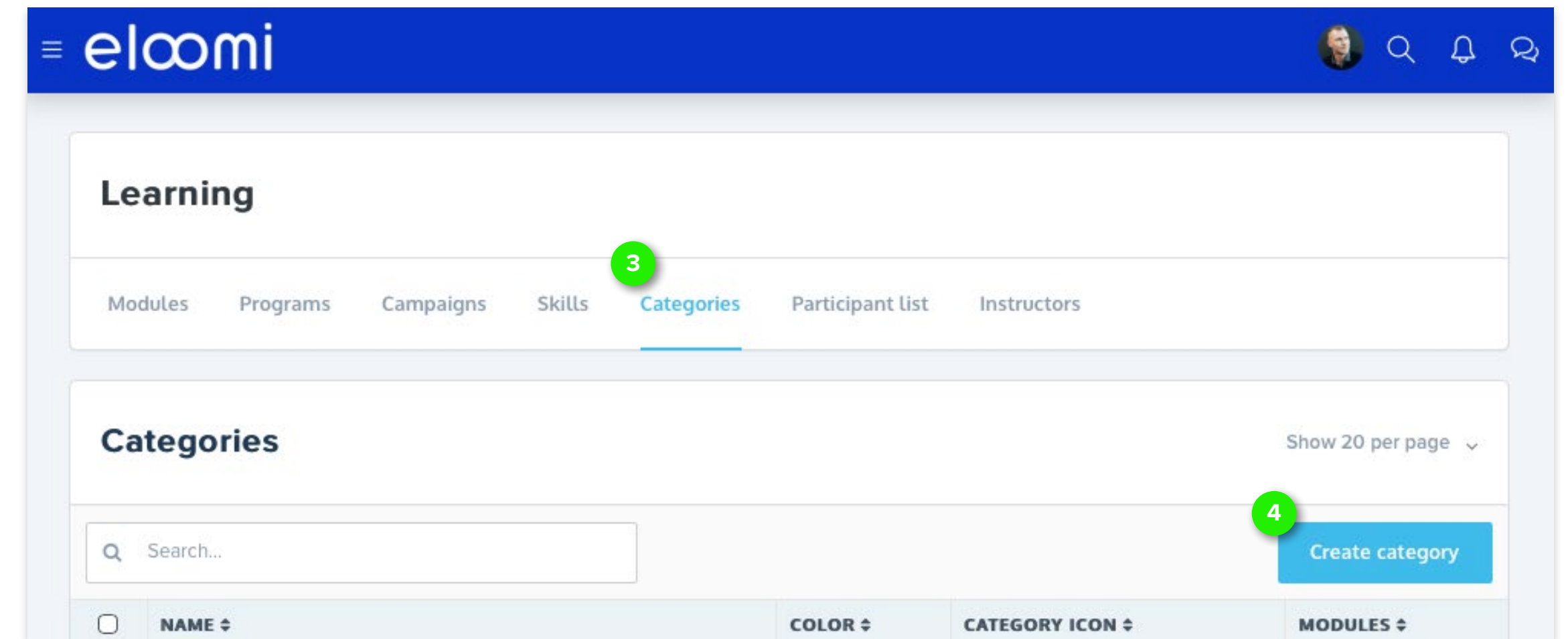
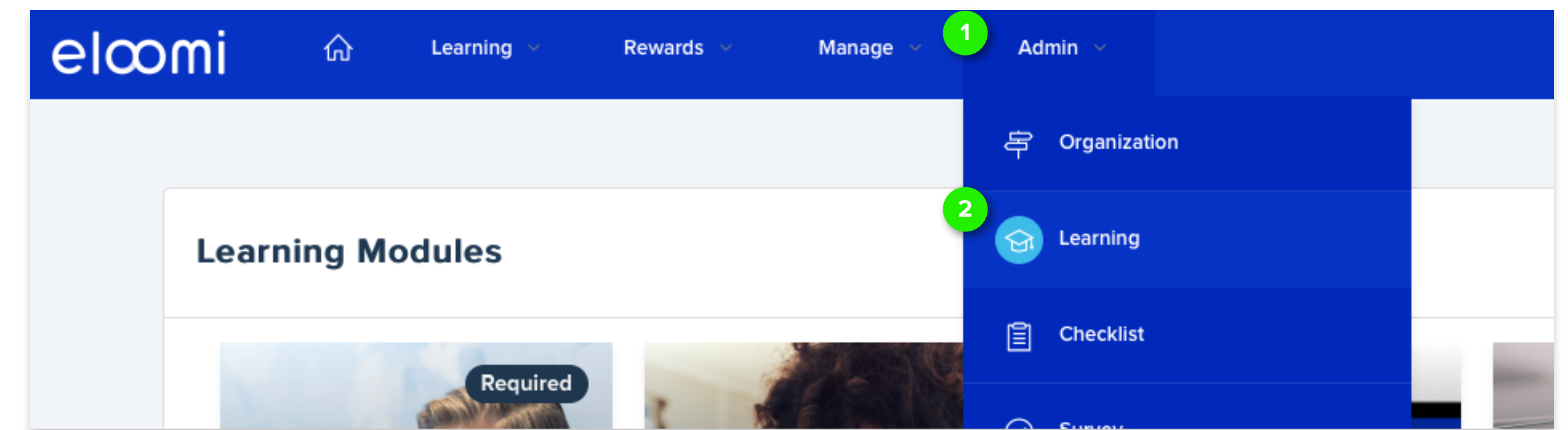
1) Go to: **1 Admin** -----> **2 Learning** -----> **3 Categories**;

2) Click on **3 Create category**;

3) Enter **4 Category name** in the language of your choosing. Remember: Category will only appear in the language you have entered.

In case your organization operates in multiple locations you may also choose to translate the category name to a different language.

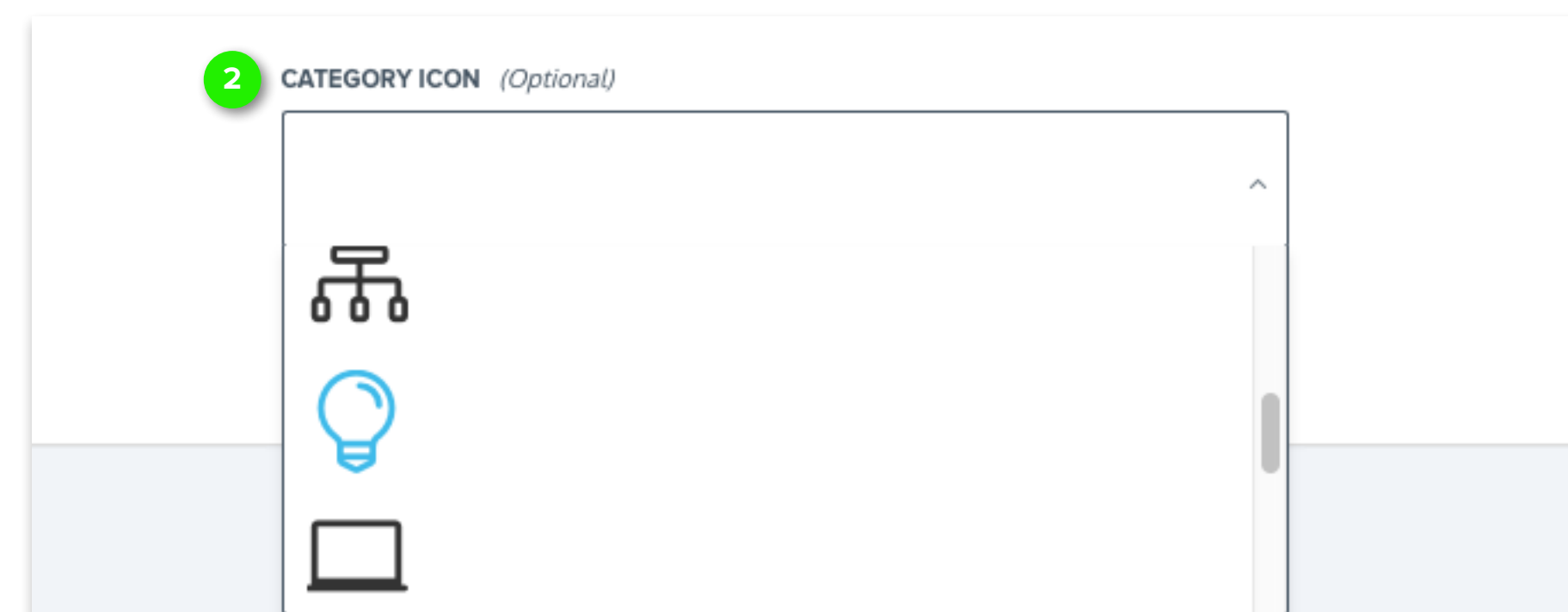
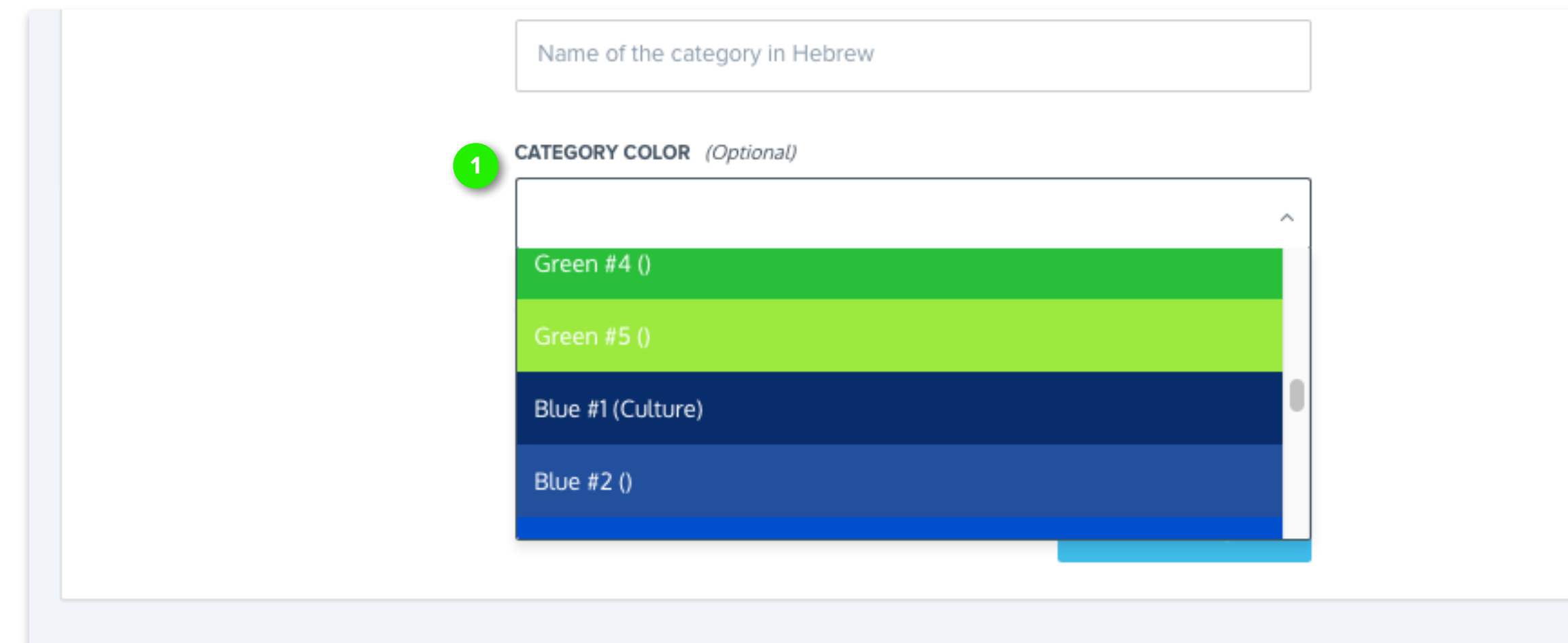
Optionally you can add **5 a parent category** to an existing or new category.



# STYLE CATEGORY

Add **a color** <sup>1</sup> of choice to appear as a tag with the Category.

Assign **a category icon** <sup>2</sup>. Note that the Category icon does not appear on any module cover but only on Categories page.





# ONLINE MODULES

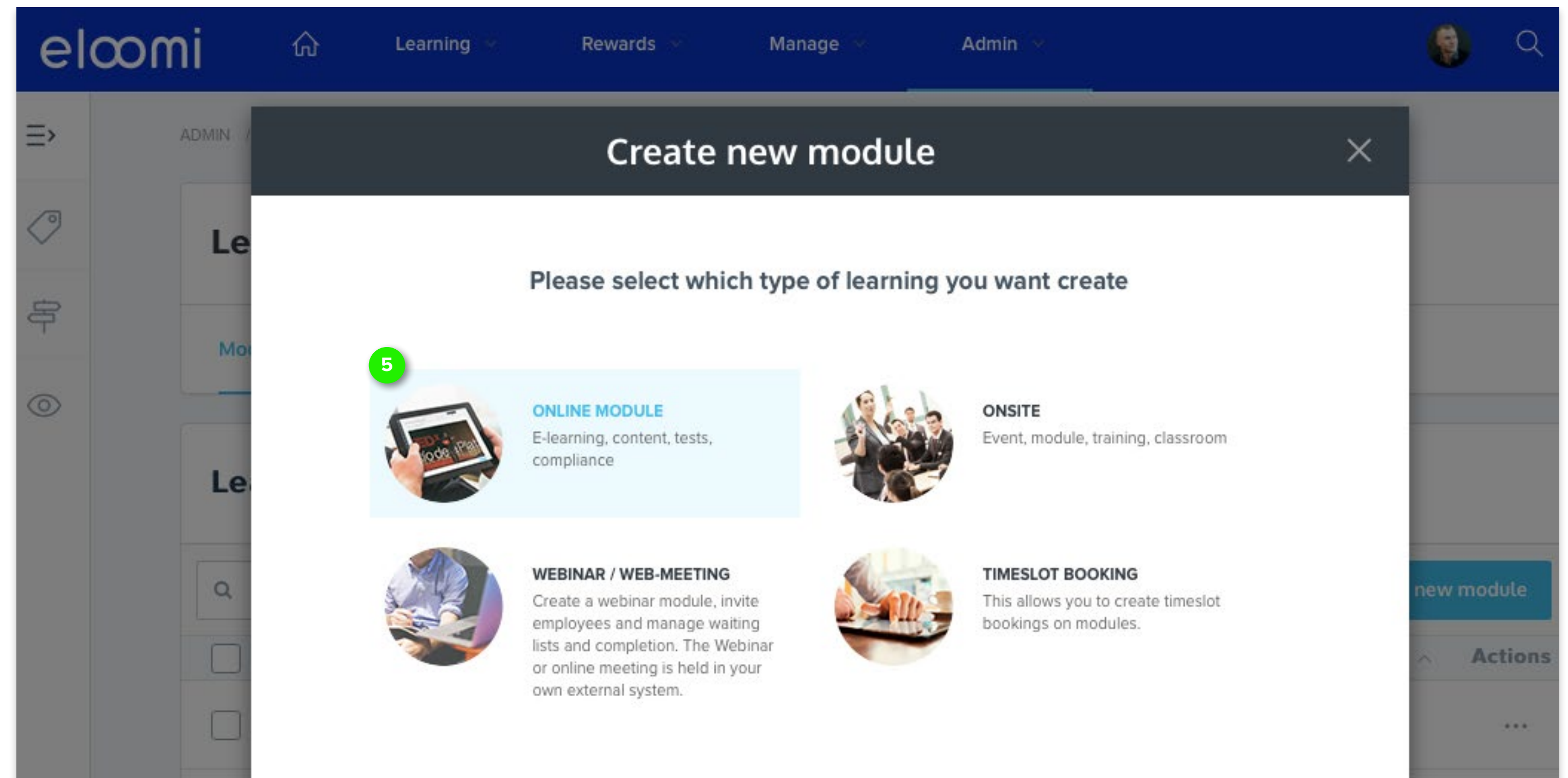
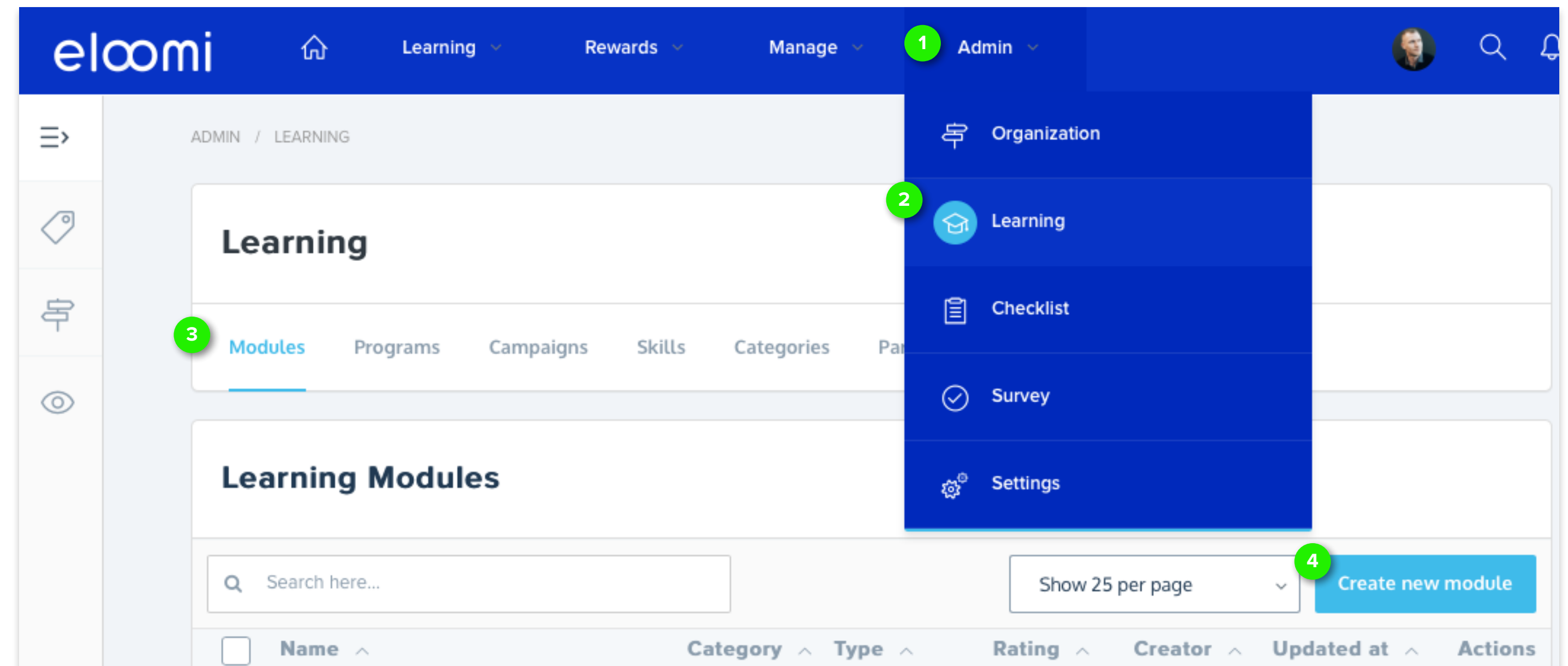
# CREATE AN ONLINE MODULE

Go to: **1 Admin** → **2 Learning** → **3 Modules**;

Click on **4 Create New Module**;

You will have the option to choose between different types of Learning, i.e: Online, Onsite and Webinar

For starters, click on create **5 Online module**.





# EDIT MODULE

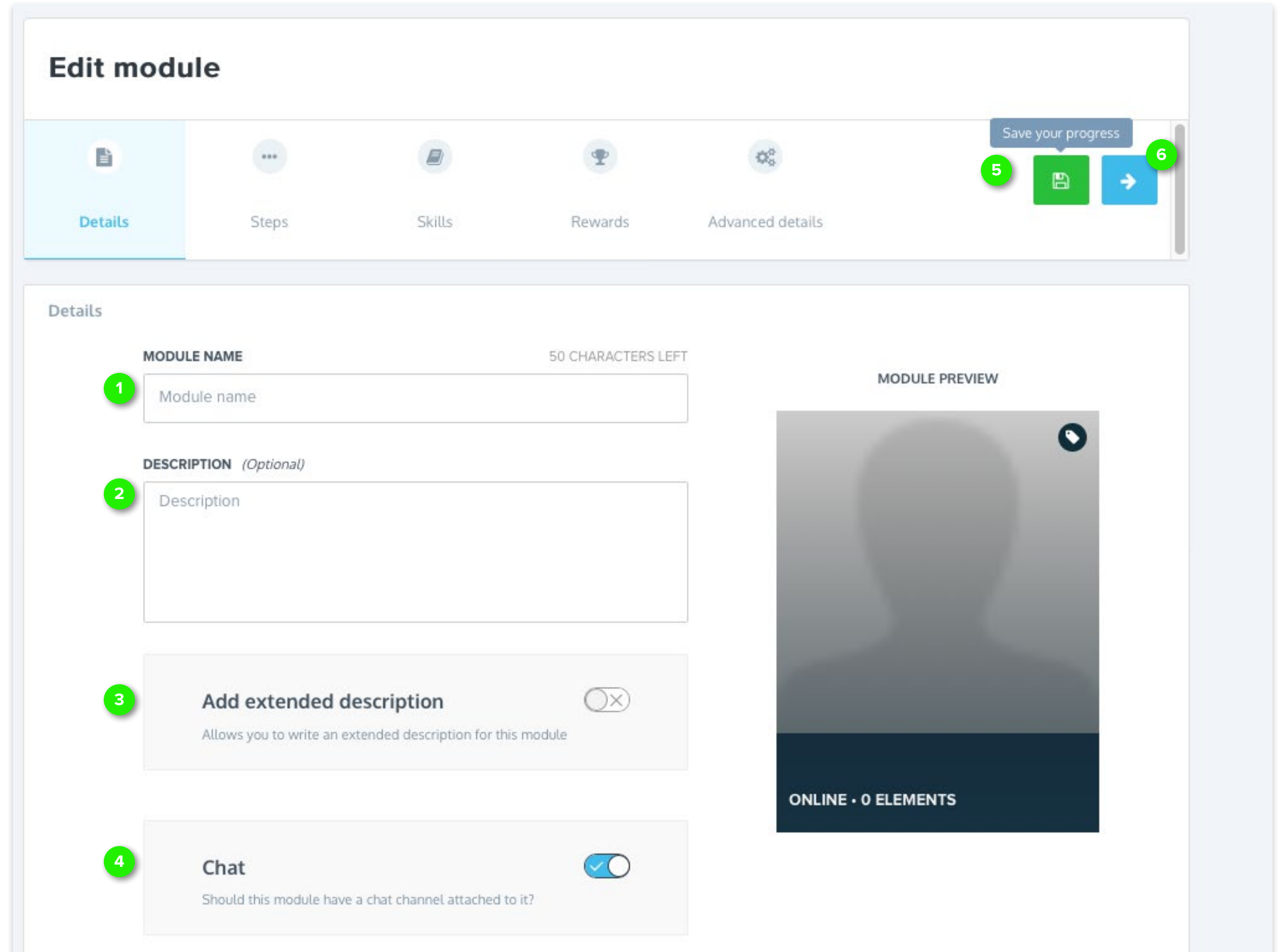
On the Details page, you can give the module **a name** <sup>1</sup>, **a description** <sup>2</sup> (max. 200 characters) and also have the option to add an **extended description** <sup>3</sup>.

You can also activate the **chatter function** <sup>4</sup>. This will open a chat room specifically for this module and the users assigned to it.



Click on the **save progress** <sup>5</sup> icon or the **blue button** <sup>6</sup> to proceed at any stage of the process and your progress will be saved automatically.

## IMPORTANT:

A Module will be considered **active and live** only if you press the **blue checkmark** <sup>7</sup> after finalizing all the details.



**Edit module**

Save your progress <sup>5</sup>   <sup>6</sup>


Details

MODULE NAME 50 CHARACTERS LEFT

<sup>1</sup> Module name

DESCRIPTION (Optional)

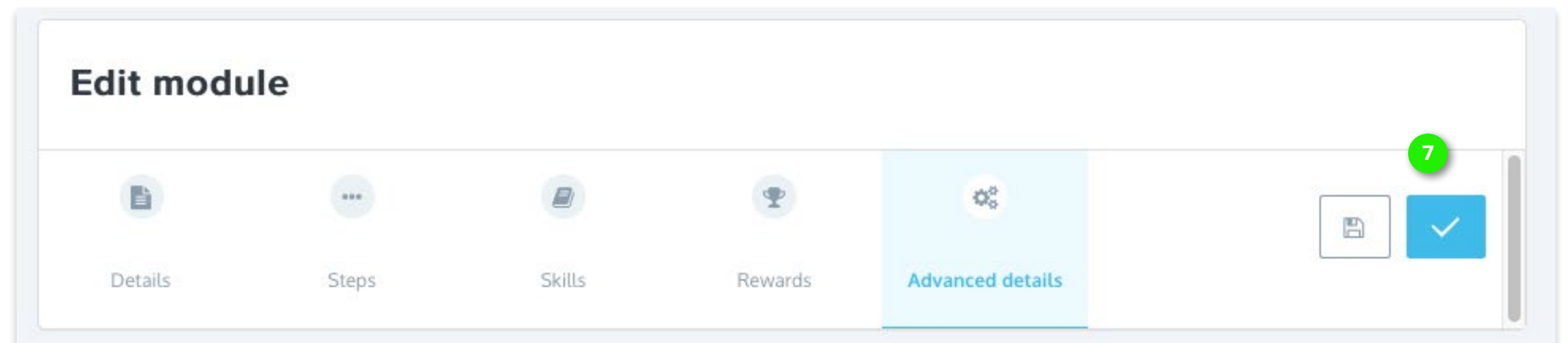
<sup>2</sup> Description

<sup>3</sup> Add extended description    
Allows you to write an extended description for this module



<sup>4</sup> Chat   
Should this module have a chat channel attached to it?

MODULE PREVIEW

ONLINE - 0 ELEMENTS



**Edit module**

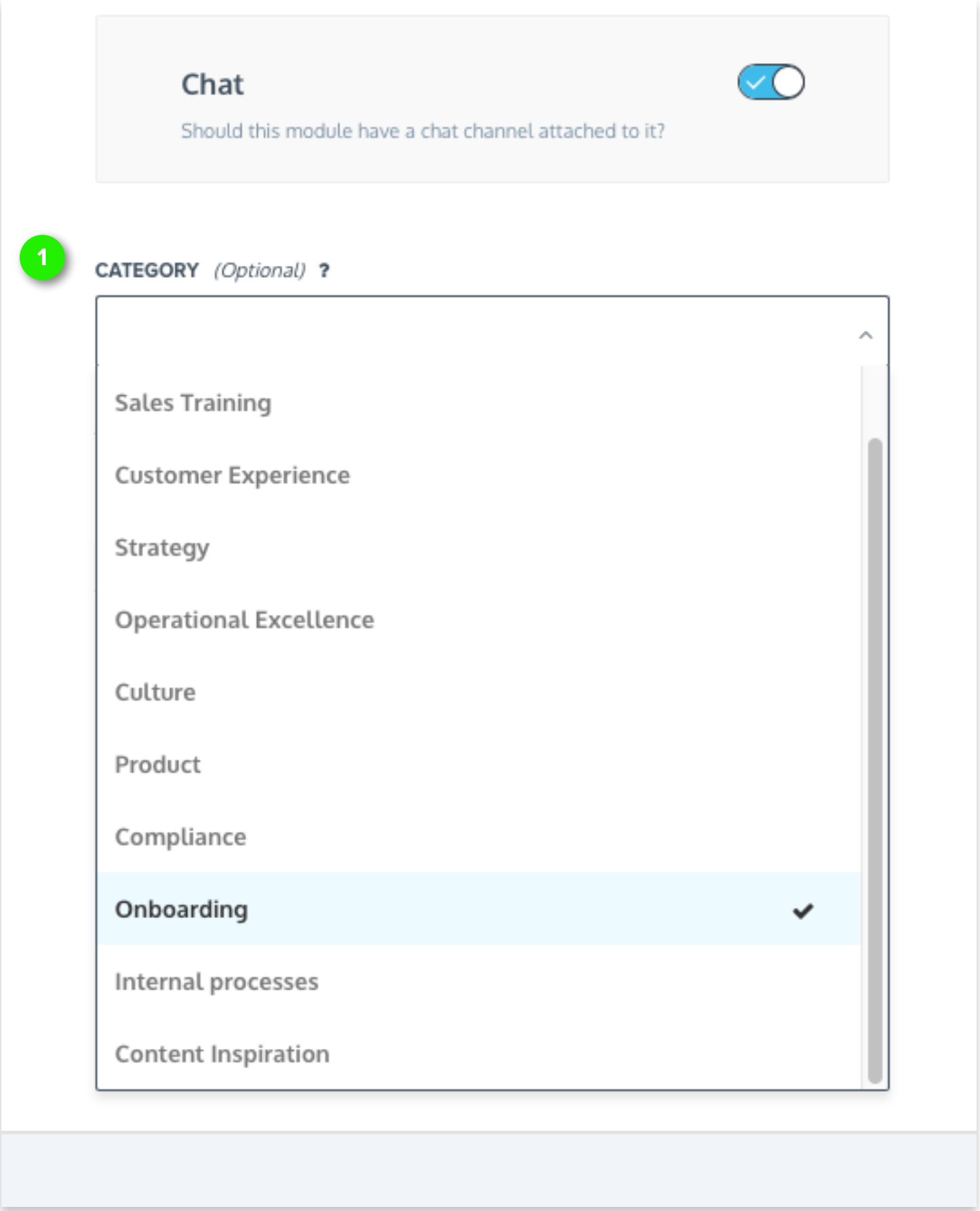
  <sup>7</sup>

Details Steps Skills Rewards **Advanced details**

# ADD CATEGORIES

Add category to a module by selecting a category **1** and its sub-categories from the drop down menu from the Details page.

Module will be tagged with this category and users can search for a category or sub-category from the filter sidebar on My Learning.



**Chat**

Should this module have a chat channel attached to it?

**1** **CATEGORY** (Optional) ?

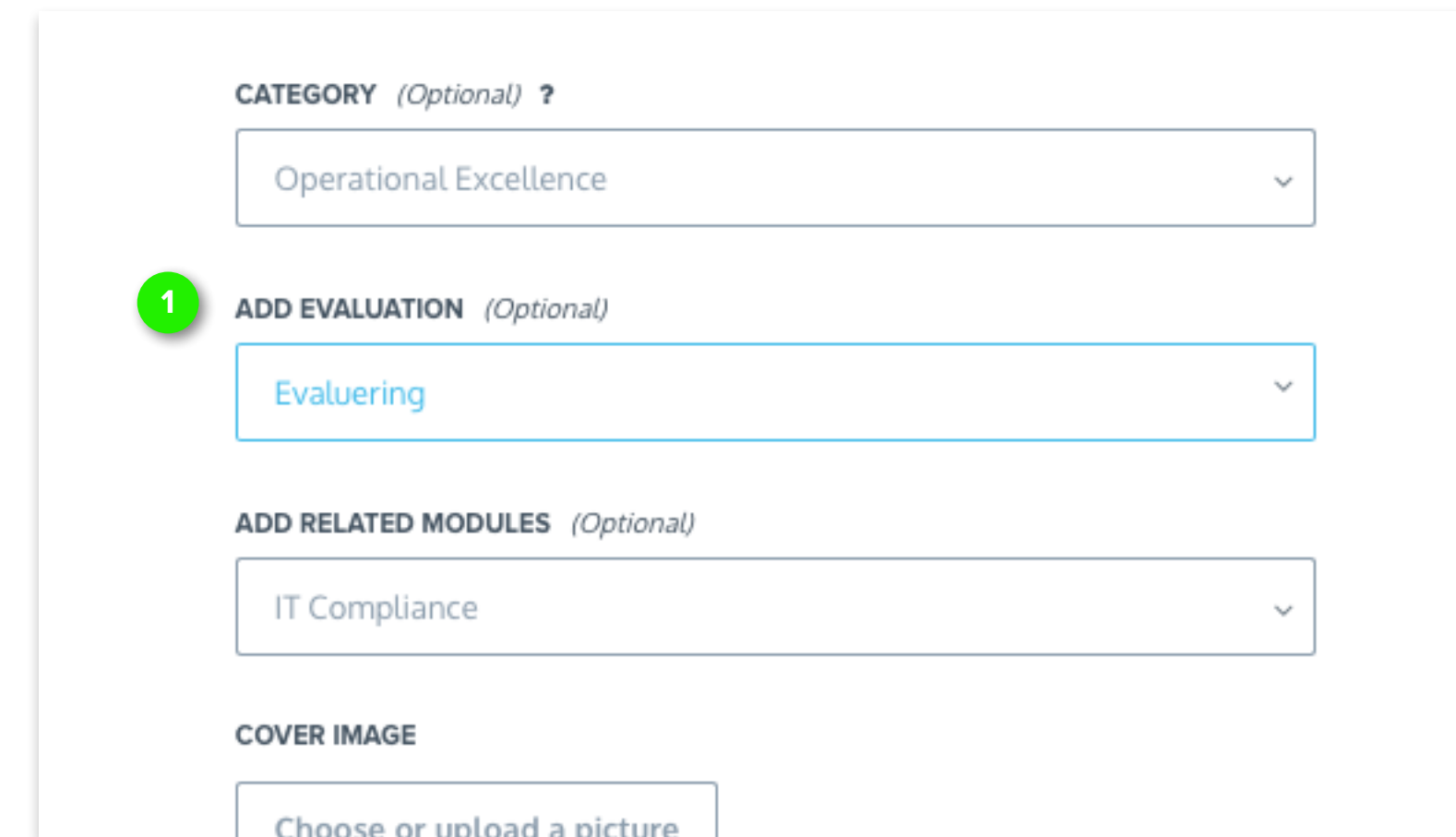
- Sales Training
- Customer Experience
- Strategy
- Operational Excellence
- Culture
- Product
- Compliance
- Onboarding** ✓
- Internal processes
- Content Inspiration



# EVALUATION

You can attach a **Survey/Evaluation** <sup>1</sup> with a module.  
The drop down <sup>2</sup> will enable you to pick and choose your favorite.

Once a user completes the module, the Evaluation attached here will be automatically assigned to the user and he/she will be notified through an email.

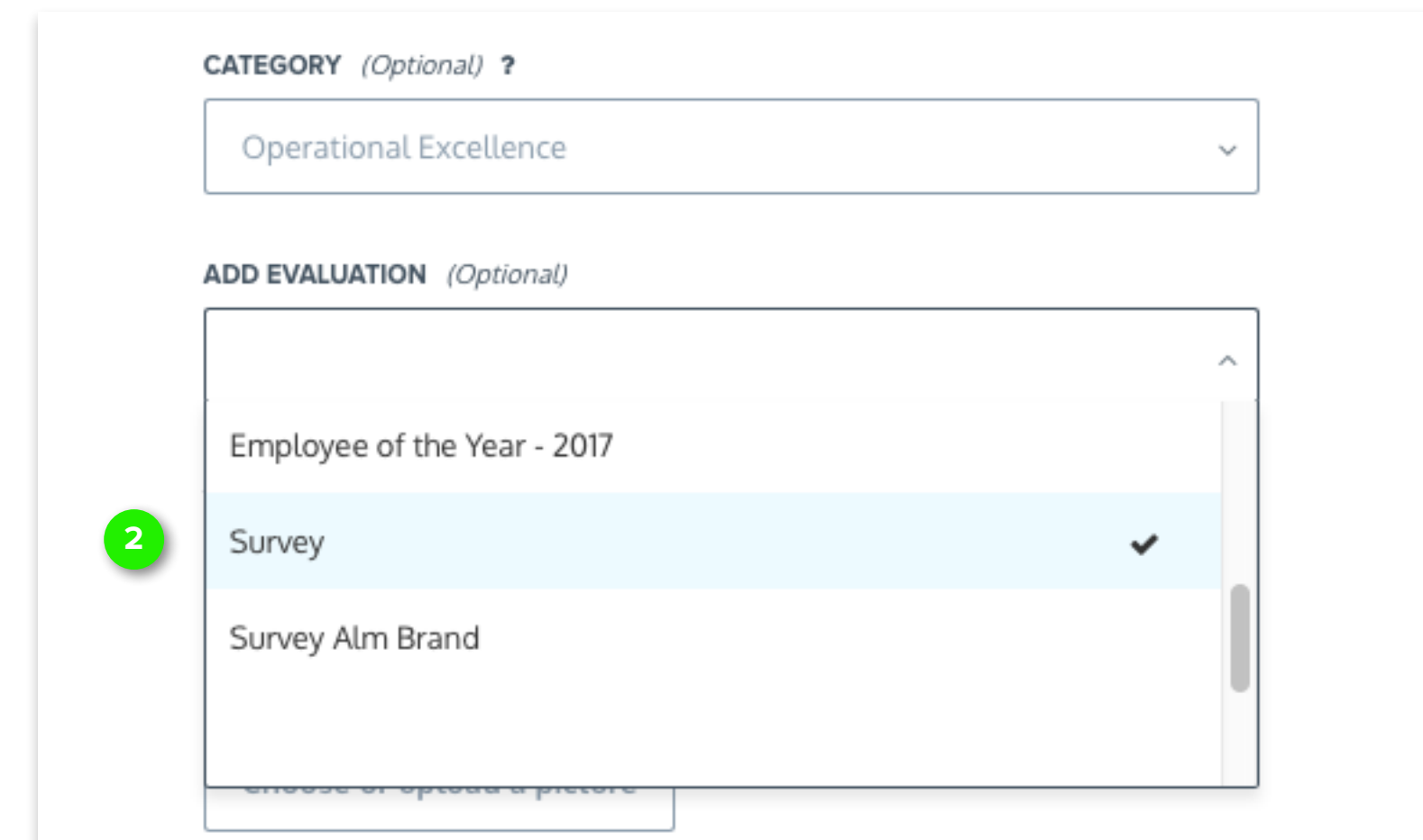


CATEGORY (Optional) ?  
Operational Excellence

<sup>1</sup> ADD EVALUATION (Optional)  
Evaluating

ADD RELATED MODULES (Optional)  
IT Compliance

COVER IMAGE  
Choose or upload a picture



CATEGORY (Optional) ?  
Operational Excellence

<sup>2</sup> ADD EVALUATION (Optional)  
Employee of the Year - 2017  
Survey ✓  
Survey Alm Brand

Choose or upload a picture

# RELATED MODULES

A module can have multiple modules which might be related to it, through similar categories or themes etc.

Modules specified as related modules **1** will appear on the preview page of a module for the user as related modules.

The screenshot shows a configuration panel with two sections. The top section is titled 'ADD EVALUATION (Optional)' and contains a dropdown menu with the text 'Evaluering, Survey'. The bottom section is titled 'ADD RELATED MODULES (Optional)' and is marked with a green circle containing the number '1'. It features a scrollable list of four items: 'Partner Onboarding 1', 'Partner Onboarding 2', 'Partner Onboarding 3', and 'Partner Onboarding 4'. The item 'Partner Onboarding 2' is highlighted in blue. Below the list is a small input field containing the number '1' and a vertical scrollbar on the right side.

# SORT ORDERING

With **sort ordering** **2** you can ensure how the module will appear to users on their Learning Overview.

If sort ordering is set to "0" the module will always appear as the first module on the learning overview.

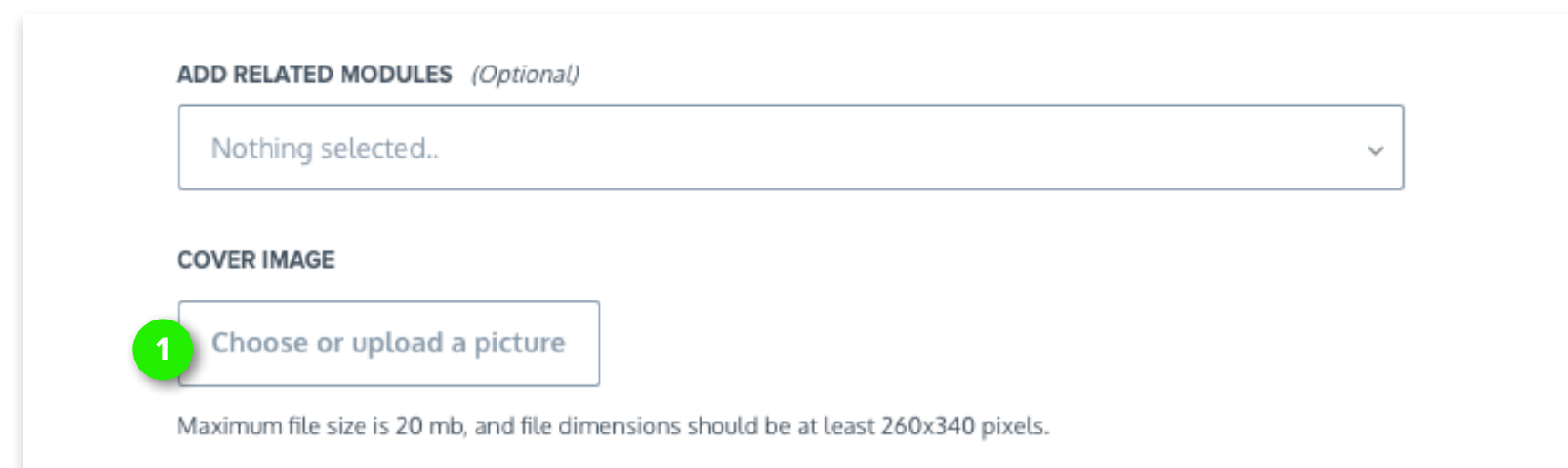
The screenshot shows two configuration panels. The top panel is titled 'COVER IMAGE' and contains a button labeled 'Choose or upload a picture'. Below the button is a note: 'Maximum file size is 20 mb, and file dimensions should be at least 260x340 pixels.' The bottom panel is titled 'SORT ORDERING' and is marked with a green circle containing the number '2'. It features a text input field with the value '0' and a vertical scrollbar on the right side.



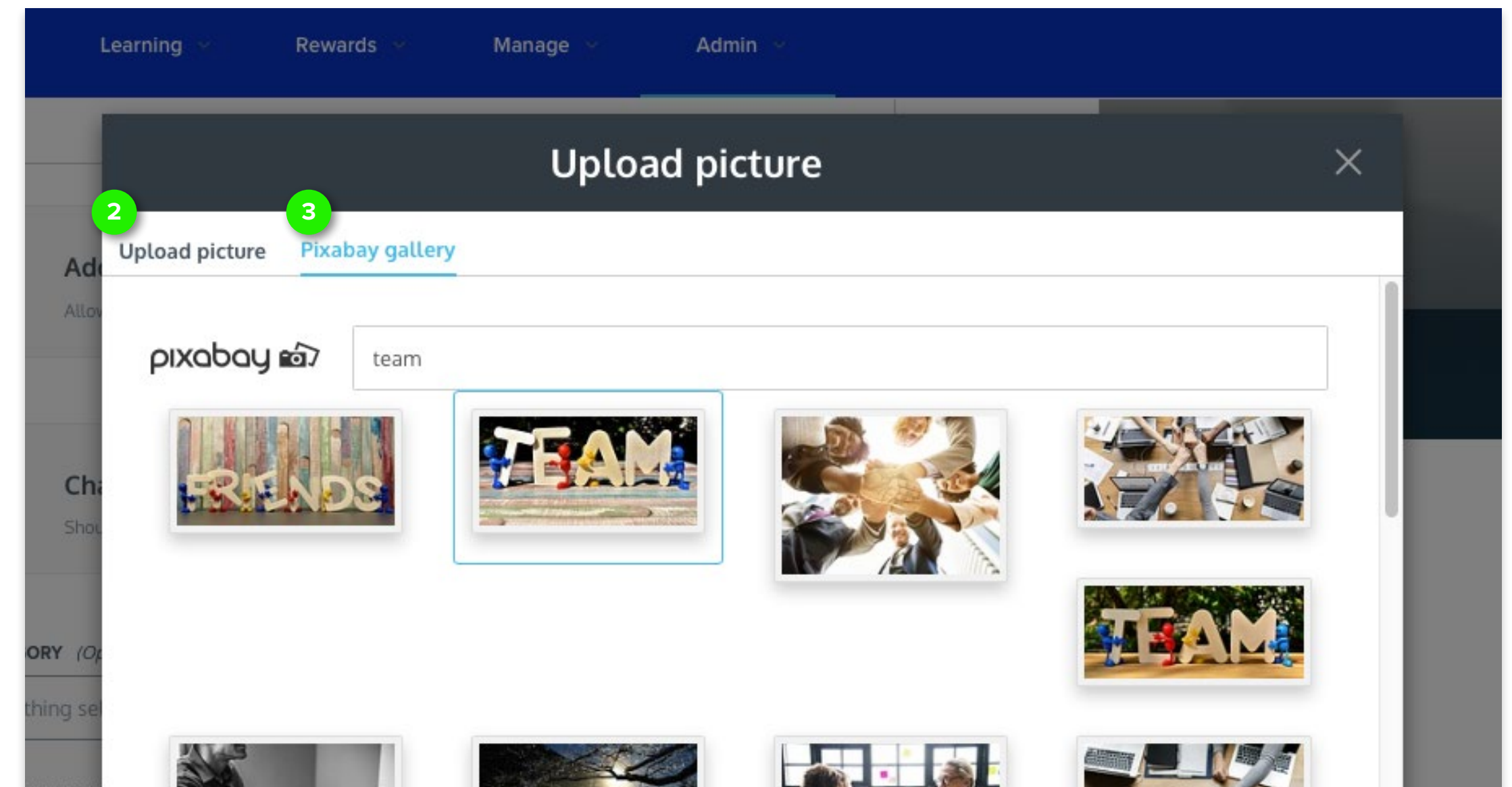
# COVER IMAGE

All Modules and Programs can have a Cover Image which will give the user an idea of what the training pertains to. Colorful images also add an appealing touch to the user's aesthetics.

Once you click on **Choose or Upload a picture** <sup>1</sup>, the pop up will allow you to either upload an image from your local machine <sup>2</sup>, or use our online library <sup>3</sup> of thousands of images .



Once you have selected an image and click on Use Picture, you will be prompted to choose an area of the image <sup>4</sup> you want as cover of the Module.

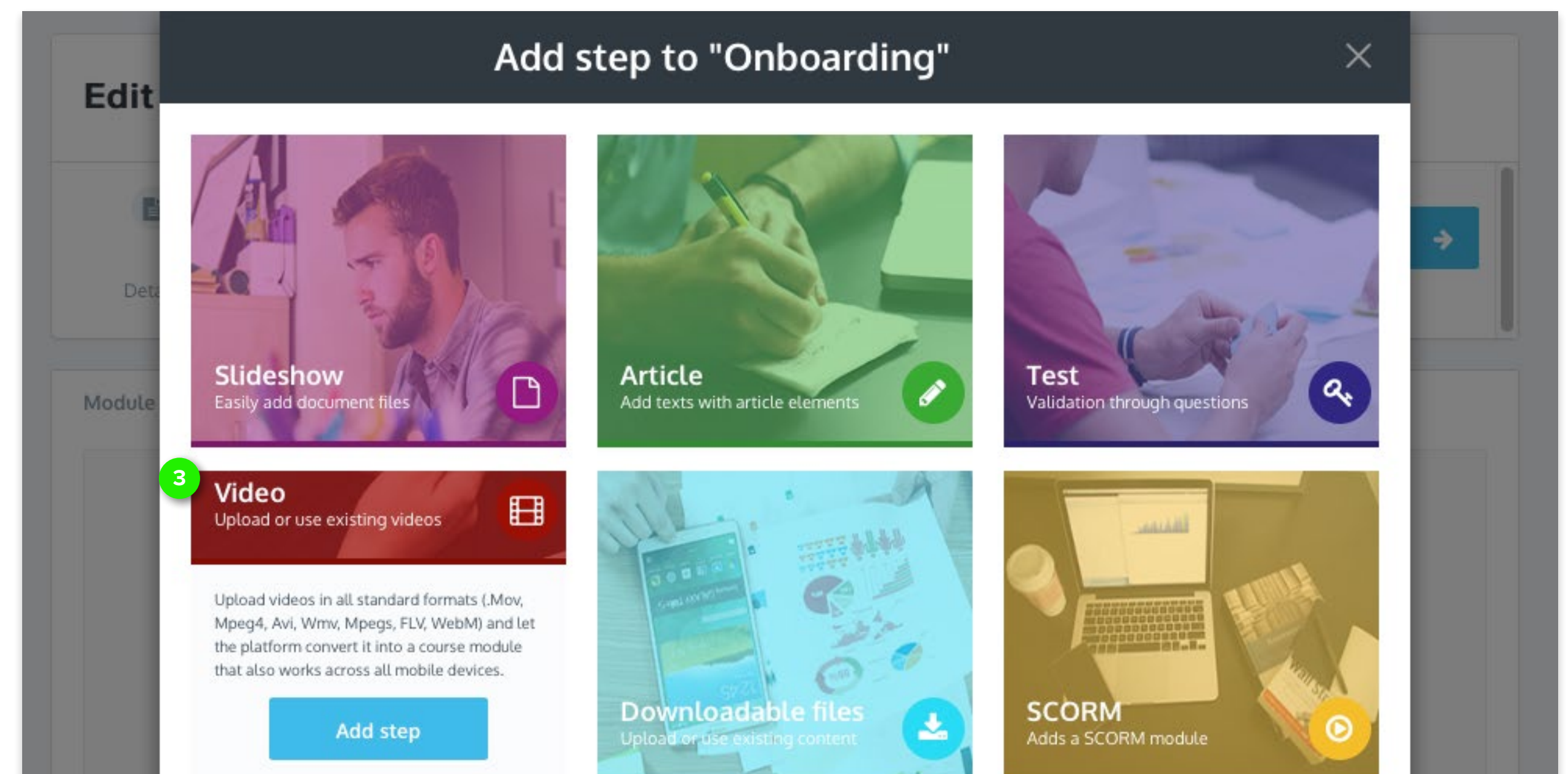
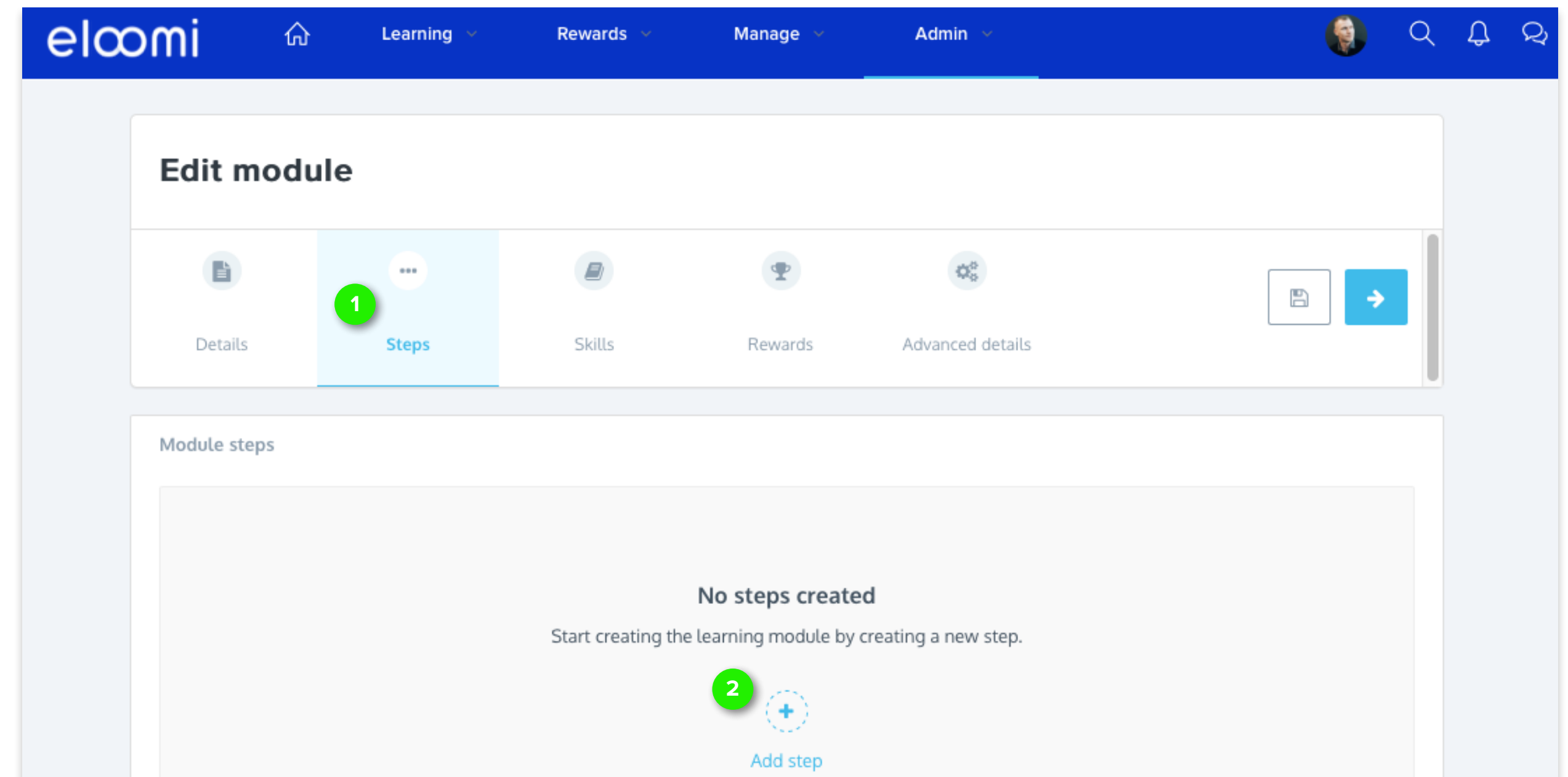




# ADD CONTENT

This step in the Course Builder allows you to add content to the module. Click **Steps** <sup>1</sup> and **Plus icon** <sup>2</sup> to open **pop-up**:

- You will have the option to **upload Videos** <sup>3</sup> from your hard drive in standard video formats. You can also stream videos directly through YouTube or Vimeo;
- You can use the Slideshow function to upload PowerPoint and PDF files. Users will be able to scroll through the files while previewing the module;
- Integrated website allows you to embed your company website or any other secure web content which you wish to share with your employees;
- Files can be uploaded through the Downloadable Files option and users will be able to download these files to their machine;
- Article builder allows you to build content in a dynamic way, including images and text with look and feel of a web page;
- You can also add SCORM files.



# UPLOAD VIDEO

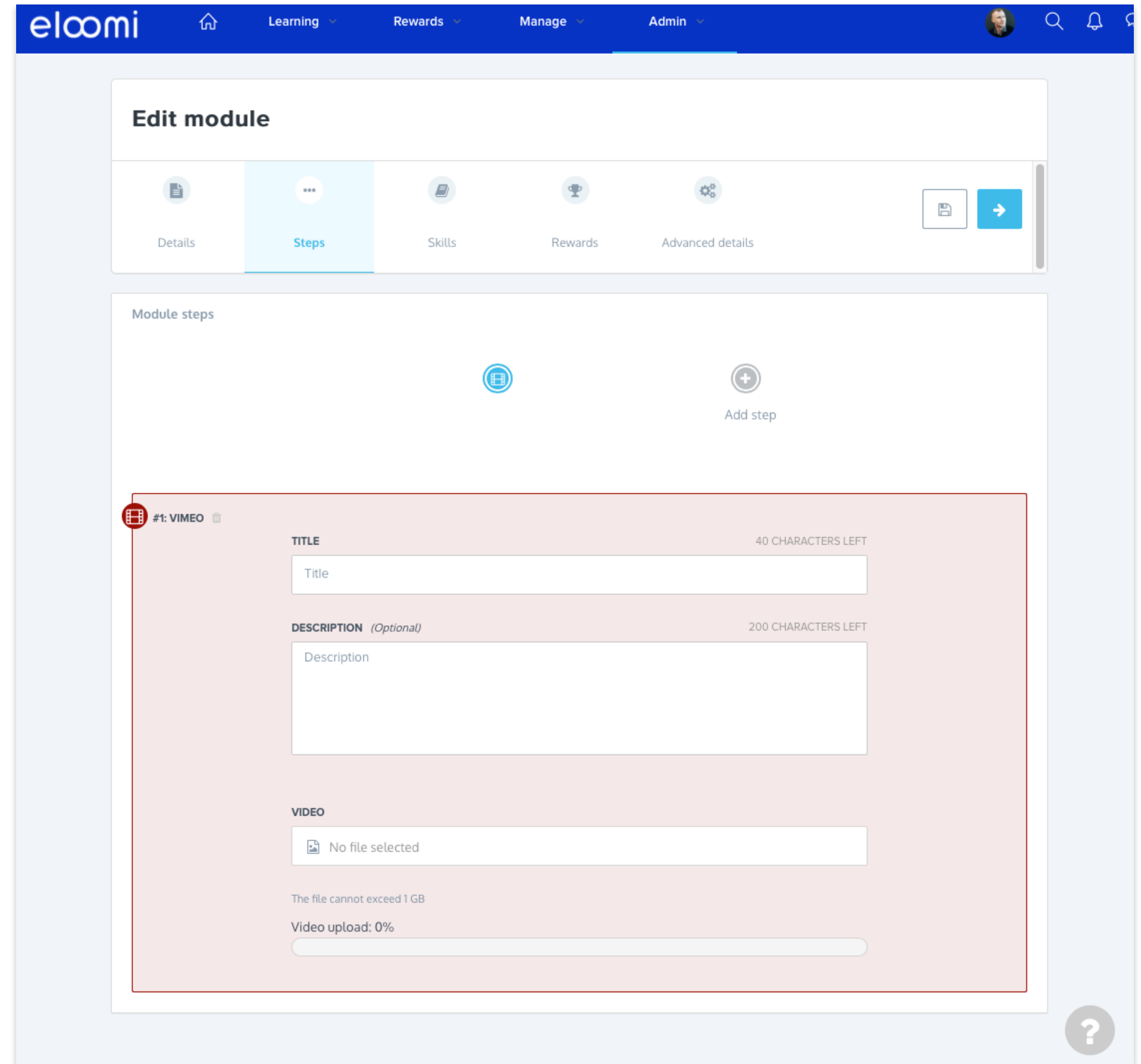
eloomi offers both streaming of videos through YouTube and Vimeo, and also allows videos to be uploaded in the form of MP4, MPEG and other generally supported formats.

- Select the Video upload option while adding content or Steps to a module
- You can now enter a title for this video and upload the file
- The progress bar will turn green when video has been uploaded
- You will receive an email informing you video is being processed and will be available for viewing/sharing shortly
- At most times videos get uploaded instantly - however during peak traffic times where there are a lot of videos being uploaded simultaneously, it might take a few hours
- In case you see the error message, please try and upload the video again as it means the video was either not approved by Vimeo or there was an error.

## NOTE:

Videos are hosted by Vimeo, so before a video becomes available it must be approved by Vimeo.

If your video does not get uploaded after a few hours - Please contact eloomi Support by logging in to [www.helpdesk.eloomi.com](http://www.helpdesk.eloomi.com)



The screenshot displays the 'eloomi' dashboard with a navigation bar containing 'Learning', 'Rewards', 'Manage', and 'Admin'. The main content area is titled 'Edit module' and features a tabbed interface with 'Steps' selected. Below the tabs, there is a 'Module steps' section with an 'Add step' button. A video upload form is visible, titled '#1: VIMEO', with fields for 'TITLE' (40 characters left) and 'DESCRIPTION (Optional)' (200 characters left). The 'VIDEO' section shows 'No file selected' and a progress bar for 'Video upload: 0%'. A note indicates 'The file cannot exceed 1 GB'. A help icon is located in the bottom right corner.

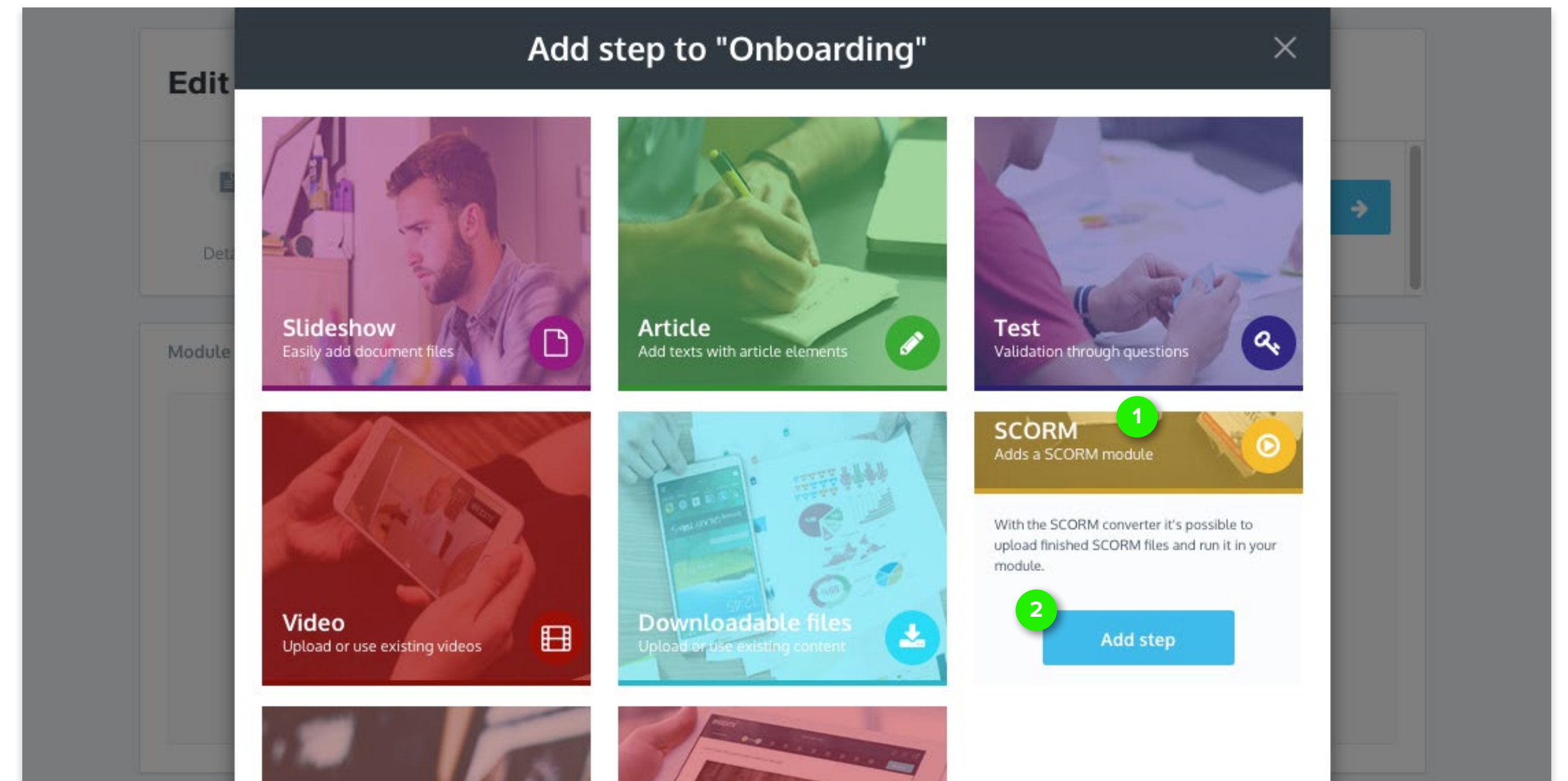


# SCORM FILE

You can upload a SCORM file to eloomi and run it through the LMS to share learning with your users.

It is very simple and easy to upload a SCORM file and you can do that while "editing/creating" a module and through "Adding Steps".

- Mouse over the SCORM **1** and click **Add step** **2** button;
- Add a **title** **3** for the SCORM step (please consider this carefully in case module has multiple SCORM or other multimedia elements);
- Add a **Description** **4** about the type of learning/theme so the learner gets a good idea around the learning;
- Choose **Validate completion** **5** in case you have a test built into the SCORM and want users to achieve a certain amount of correct answers;
- Use **Hide SCORM** **6** menu in case you want to hide the SCORM menu from the users.





# SUPPORTED SCORM VERSIONS

If the data we can get must be set from the SCORM to API (this part depends on SCORM developers)

Available data that we can get from API:

## SCORM 1.2

- Result (correct or incorrect answer for question)
- Type of question
- Technical data

## SCORM 2004 from 1st to 4th Edition

- Text of question
- Result (correct or incorrect answer for question)
- Type of question
- Technical data

From API we can not get text of answer or quantity of answers but we can get index number of answer or index number of correct answer.

At the moment we are working on getting data about questions and answers from API as well so this is still WIP.



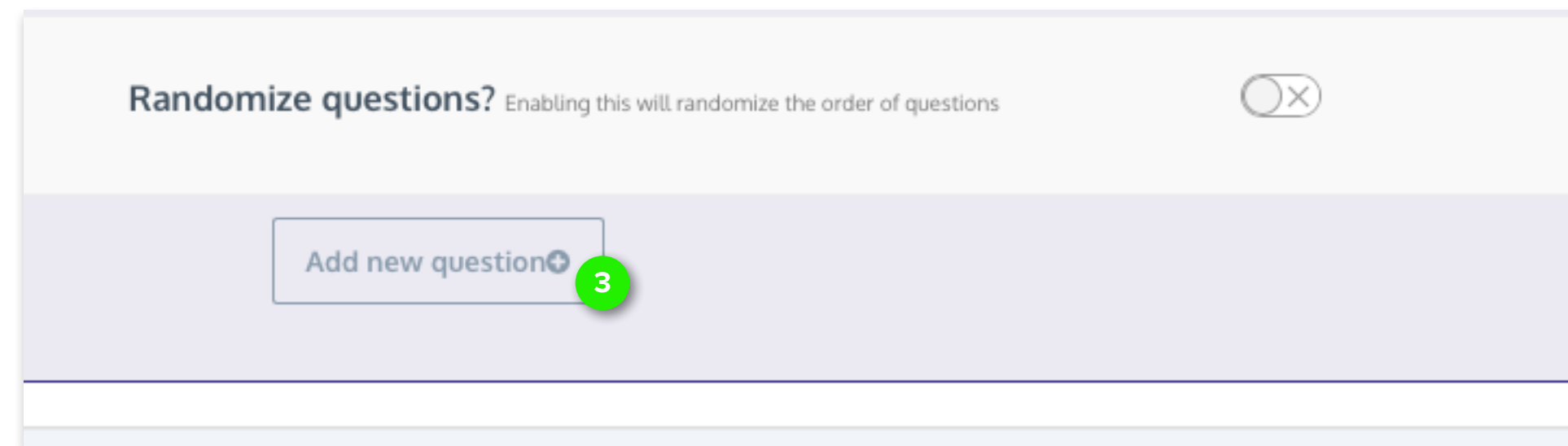


# BUILDING A TEST/QUIZ

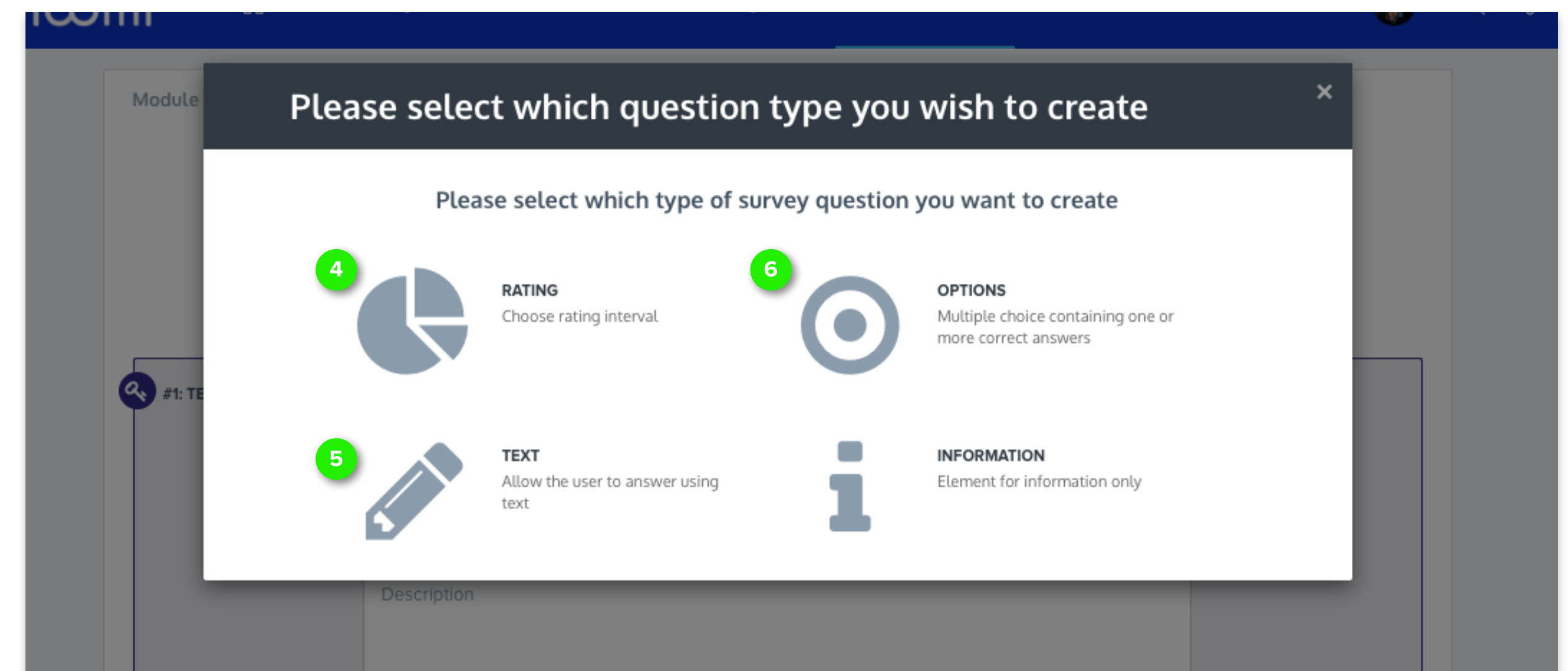
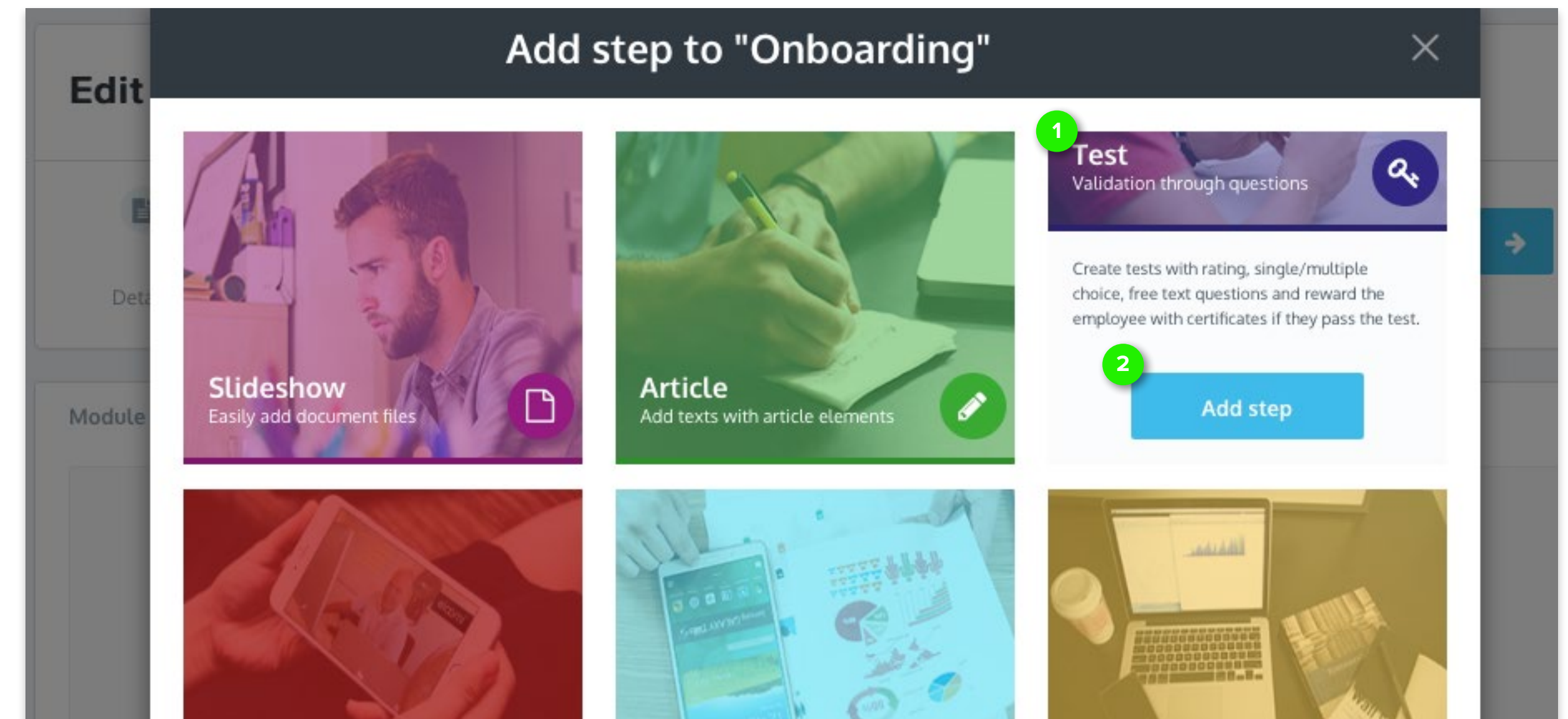
Online modules allow you to build a Test/Quiz in a module to validate the information you have shared with your users. You can setup a certain percentage required for the test to be passed.

Choose **Test** <sup>1</sup> from Add step pop-up. Click **Add step** <sup>2</sup>.

Click on **Add New Question** <sup>3</sup> to start adding different type of questions to your test:



- **Rating Questions** <sup>4</sup> allow you to setup a custom rating scale and provide rating descriptions;
- Free **Text Question** <sup>5</sup> will provide the users with a Free Test comment box;
- You can also create **Multiple** or **Single Choice Questions** <sup>6</sup>.





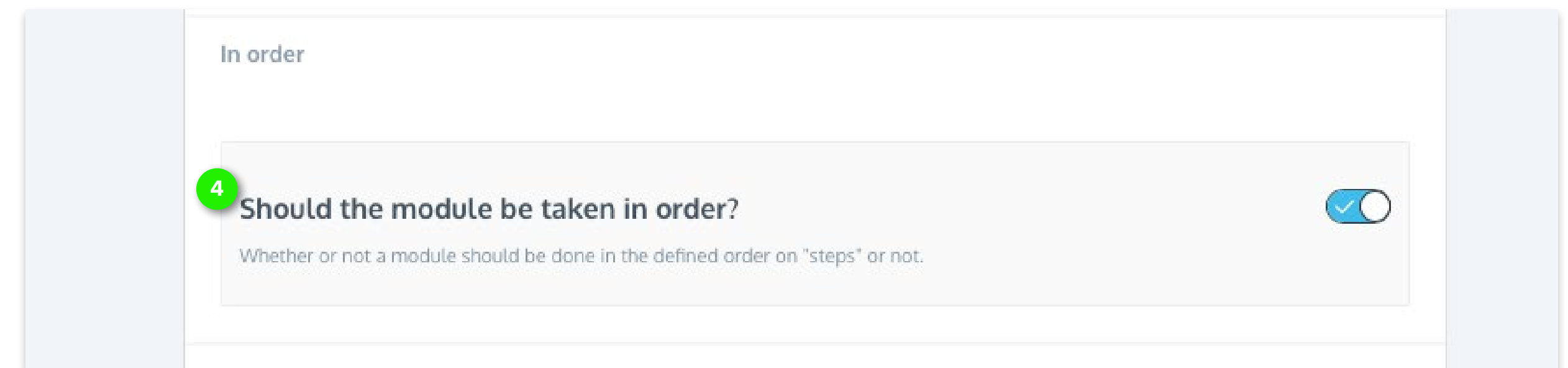
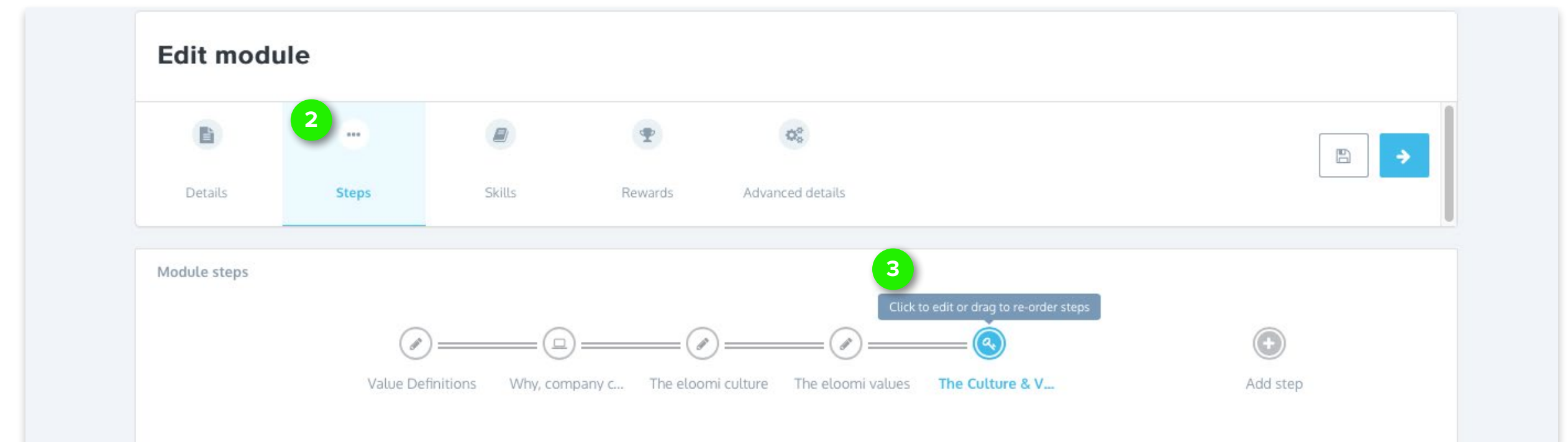
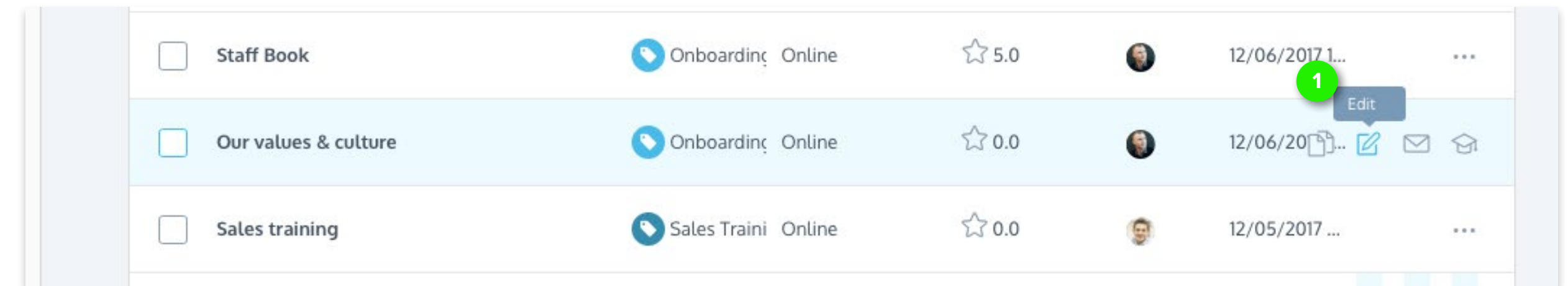
# ARRANGE STEPS

You can add as many steps to a module by clicking on the Add Step icon.

You can also customize and create a Learning Path by arranging the Steps in a certain order. Click: **1** Edit icon **2** Steps and then **3** Drag and Drop the different steps to arrange as you require.

In case you need to remove a Step you can start dragging it to the left, a Box will appear - drop the step inside the box and it will be removed.

Under **Advanced Details** **4** as the last step of module creation, you can specify whether the module should be taken in a **pre-defined order** **4** (recommended) or in a randomized order of Steps.



# ADD SKILLS

You can attach multiple skills to an Online Module by clicking **Skills** <sup>1</sup>.

You can specify to what degree does this module train a user on a certain skill by choosing options: **Light, Medium, Advanced** <sup>2</sup>.

If the Skill you are looking for is not found in the drop down, you can click on **Add New Skill** <sup>3</sup>.

The screenshot shows the 'Edit module' interface in the eloomi system. The top navigation bar includes 'eloomi', a home icon, and dropdown menus for 'Learning', 'Rewards', 'Manage', and 'Admin'. The main content area is titled 'Edit module' and features a horizontal tab bar with 'Details', 'Steps', 'Skills', 'Rewards', and 'Advanced details'. The 'Skills' tab is selected and highlighted with a green circle '1'. Below the tabs, the 'Skills training' section is visible, containing a toggle for 'Add Skills training (recommended)?' which is turned on. A table lists skills and their training levels:

SKILL	NONE	LIGHT	MEDIUM	ADVANCED
Compliance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/> <sup>2</sup>
Choose a skill	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

At the bottom of the table, there is a dashed box containing an 'Add new skill' button, which is highlighted with a green circle '3'.

# POINTS & CERTIFICATES

You can add **Points & Certificates** under the **Rewards** <sup>1</sup> section while building a module.

## How to add Points

You can reward a user by giving them Points for completing a Module:

- **Completion Points** <sup>2</sup> are awarded to a user for completing a module;
- **Speed Points** <sup>3</sup> are awarded to the users who complete the module first.

## How to add Certificates

**Certificates** <sup>4</sup> are awarded to a user once Module has been completed.

The screenshot shows the 'eloomi' interface for editing a module. The top navigation bar includes 'eloomi', a home icon, and dropdown menus for 'Learning', 'Rewards', 'Manage', and 'Admin'. The main content area is titled 'Edit module' and features a horizontal menu with 'Details', 'Steps', 'Skills', 'Rewards' (highlighted with a green circle 1), and 'Advanced details'. Below this, the 'Points' section is visible, containing a toggle for 'Module should contain points?' (checked), a 'COMPLETION POINTS' input field with the value '40' (marked with a green circle 2), and a 'SPEED POINTS' input field with the value '20' (marked with a green circle 3). A note below the speed points field explains that users are ranked by completion time, with the fastest user receiving the highest number of points. The 'Certification' section below it has a toggle for 'Add certification?' (checked, marked with a green circle 4), a 'CERTIFICATE TEMPLATE' dropdown set to 'Custom', a 'CERTIFICATE TITLE' input field (40 characters left), a 'DESCRIPTION (Optional)' input field (200 characters left), and an 'UPLOAD CERTIFICATE' button with 'No file selected' and a note that the maximum file size is 20 mb.



# ADVANCED DETAILS

**Advanced details** <sup>1</sup> allows you fine-tune details on a module and automate how the module will behave once completed.

## Duration of a Module

You can give an estimate on how long this module will take <sup>2</sup>.

Users will be able to use the duration filter on their "My Learning" page and filter micro-learning.

We highly recommend using bite-sized learning in small chunks to make it easily memorable for your employees/users.

## Renewal of Modules

This option will allow you to automate you Compliance trainings. Simple select the amount of time this module should be renewed <sup>3</sup> and users will automatically be notified to take this module again

The screenshot displays the 'Edit module' interface in the eloomi system. The top navigation bar includes 'eloomi', 'Learning', 'Rewards', 'Manage', and 'Admin'. The main content area is titled 'Edit module' and features a horizontal menu with options: 'Details', 'Steps', 'Skills', 'Rewards', and 'Advanced details' (highlighted with a green circle 1). Below the menu, the 'Duration' section is visible, containing a toggle for 'Expected duration?' (checked with a blue circle 2), input fields for 'Hours' (with a sub-field 'Hours') and 'Minutes' (with the value '10'), and a question: 'How long do you estimate it will take to complete the module?'. The 'Renewal' section below it features a toggle for 'Module should be renewed?' (checked with a blue circle 2), a 'TIME OF RENEWAL' section with a green circle 3, and a dropdown menu for 'Select period'. A note at the bottom explains: 'Renewal is how often modules must be completed again. The module will change status from completed to not completed and the user will be notified.'

# ADVANCED DETAILS

## Deadlines & Reminders on a Module

In case the module will have a deadline attached to it, you can add **Reminders** <sup>1</sup> - and the platform will remind users by sending an email reminding them of the upcoming deadline.

You can also turn on the option to **Inform Leader** <sup>2</sup> in case you want the user's nearest line Manager to be informed in case anyone is missing a deadline.

In case you do not want users to take this module after the deadline has passed, you can **Lock the Module** <sup>3</sup>.

## Making a Module Reviewable

In line with eloomi's social learning, users get the option to give ratings and feedback on a module.

By making a module Reviewable <sup>4</sup>, you can get valuable insight into what is working, what is not working and what do your employees find valuable.

## Lock Module

As an Admin, you can **Lock the Module** <sup>5</sup> from others in case you are working on building a module and do not wish other Admins to have access to it. You can do so under "Advanced Details".

The screenshot displays the 'Advanced Details' configuration page for a module, organized into several sections:

- Reminders:** Features a toggle for 'Add reminders?' (checked). Below it, under 'DEADLINE REMINDERS', there are two input fields for days in advance (3 and 1) and dropdown menus for units (Day(s)). A dashed box contains a button 'Add another deadline reminder'. A note at the bottom asks: 'How many days in advance should the user be notified of the upcoming deadline?'.
- Reviewable:** Features a toggle for 'Reviewable' (checked) with the question 'Should this module be reviewable?'.
- Inform leader:** Features a toggle for 'Inform leader?' (checked) with the question 'Should the nearest leader be informed about a user missing a deadline?'.
- Lock module after deadline passed:** Features a toggle for 'Lock module after deadline passed?' (unchecked) with the question 'Should the module be locked after the deadline has passed?'.
- In order:** Features a toggle for 'Should the module be taken in order?' (checked) with the question 'Whether or not a module should be done in the defined order on "steps" or not.'.
- Lock module from others:** Features a toggle for 'Lock module from others' (unchecked) with the note 'This means that only you, the creator of the module can modify this module.'.

## Edit an existing Module

Once a Module has been created, you can always edit or make changes to it by hovering the cursor over the particular module and click on the **Edit** <sup>2</sup> option under **Actions** <sup>1</sup>.

This will take you to the Course Builder again where you can make any required changes to the module, add new content etc.

## Copy a Module

You can always copy an existing module. You can achieve this by hovering the cursor over the particular module and click on the **Copy** <sup>3</sup> option under Actions.

This will clone the exact same module with all content, Categories and Skills attached in the original module.

The screenshot shows the 'Learning Modules' page in the eloomi interface. It features a search bar, a 'Create new module' button, and a table of modules. The table has columns for Name, Category, Type, Rating, Creator, Updated at, and Actions. The 'Salgs træning' module is highlighted, and its 'Actions' column shows icons for Copy, Edit, and other actions.

Name	Category	Type	Rating	Creator	Updated at	Actions
Salgs træning	-	Onsite	-	[User Icon]	05/18/2018 1:25pm	[Copy] [Edit] [More]
Energy Production information for next week	-	Online	☆ 5.0	[User Icon]	05/18/2018 1:19pm	[More]
GDPR module for next week	Compliance	Online	☆ 5.0	[User Icon]	05/18/2018 3:03pm	[More]
Test Module Boozt	-	Online	☆ 0.0	[User Icon]	04/30/2018 3:14pm	[More]

This close-up shows the 'Updated at' and 'Actions' columns. The 'Updated at' column shows dates and times. The 'Actions' column shows icons for Copy, Edit, Email, and a graduation cap icon. The 'Copy' icon is highlighted with a green circle and the number 3, and the 'Edit' icon is highlighted with a green circle and the number 2.

Updated at	Actions
05/18/2018 1:25pm	[More]
05/18/2018 1:19pm	[More]
05/18/2018 3:03pm	[Copy] [Edit] [Email] [Graduation Cap]



# NOTIFY USERS

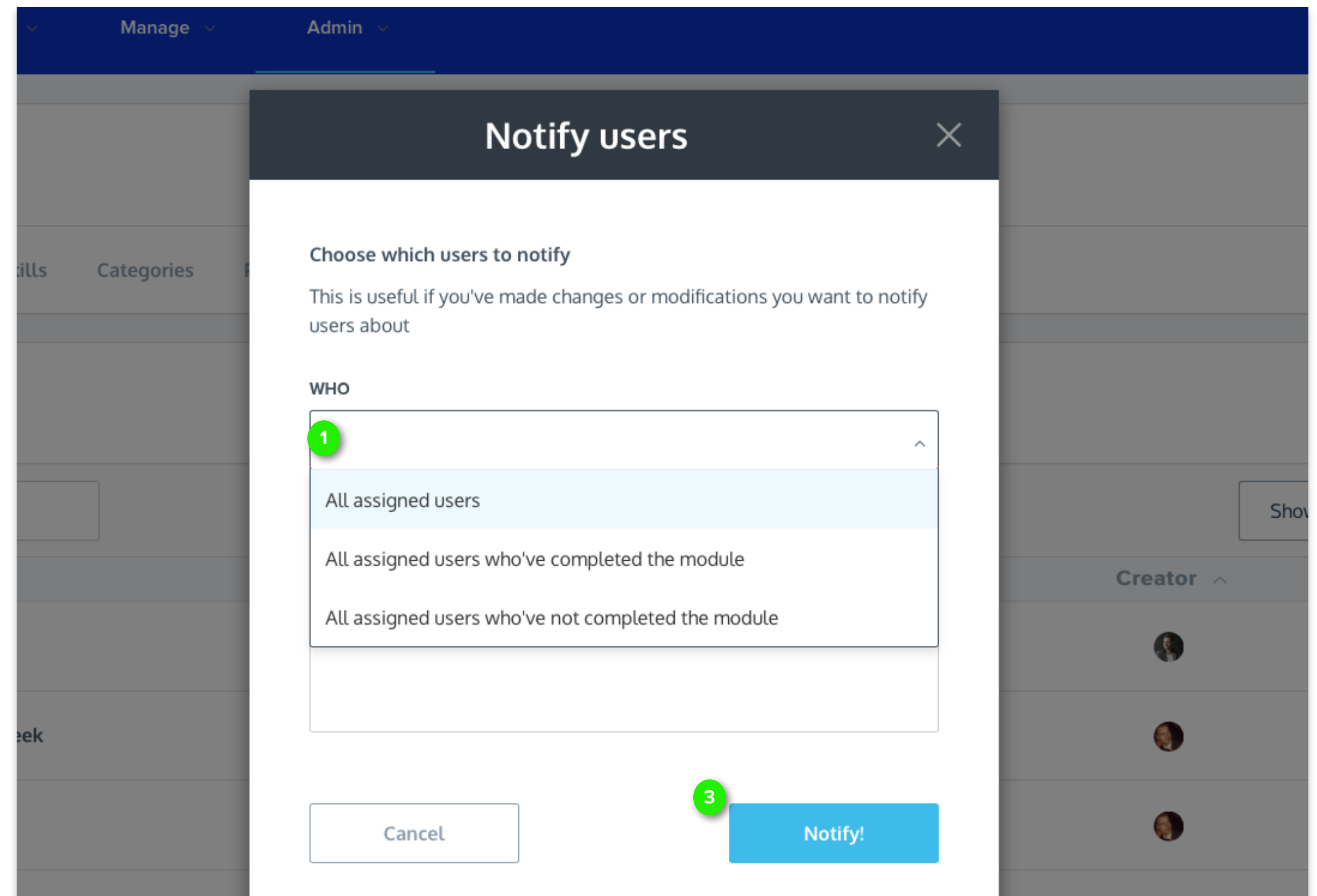
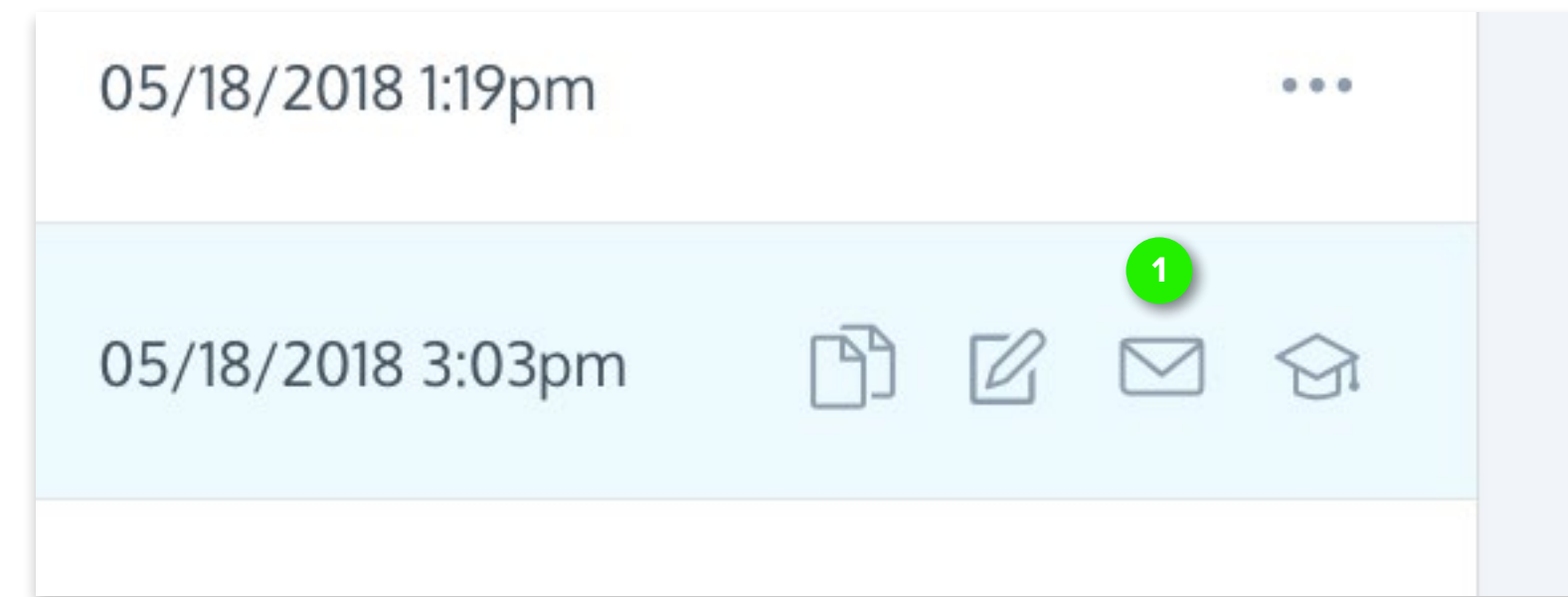
This feature can come in handy when you have made some changes to a course/program. Choose the **Notify** <sup>1</sup> feature from Actions.

You will have the option <sup>2</sup> to:

- Notify all assigned users
- Notify all assigned users who have completed this Module
- Notify all assigned users who have not completed this Module

Once the option has been chosen, you can enter a custom text in the comment field and click on **Notify** <sup>3</sup>.

An email will be sent to all the users as defined from the drop down including the custom message.



# ASSIGN A MODULE

Once a module has been created, the most crucial operation is to assign users to the module.

You can achieve this by hovering your cursor over the Module and clicking on the **Assign icon** <sup>1</sup> (a hat) from Actions as illustrated.

This will open **the assignment sidebar** <sup>2</sup> where you can see who created the module.

You will also have the option to assign this module to **Users, Departments or Teams** <sup>3</sup>.

You can use the **search option** <sup>4</sup> in the assign sidebar to search for any users which might already be assigned to this Module.

Click on **Assign users** <sup>5</sup> button to find and assign new users to this Module.

You will now have the option to choose multiple users <sup>6</sup> and assign them to this Module. You can also choose All users by a few simple clicks instead of manually choosing all users.

The screenshot illustrates the 'Assign Users' process for the 'IT Policy' module. It is divided into two main sections: the 'Module assignments' sidebar and the 'User assignments' table.

**Module assignments sidebar:**

- 1:** Assign icon (hat) in the top right corner.
- 2:** Assignment sidebar showing the creator's profile: Kenneth Jensen.
- 3:** Filter tabs for 'Users', 'Departments', and 'Teams'.
- 4:** Search icon in the top right of the sidebar.
- 5:** 'Assign users' button in the top right of the sidebar.
- 6:** 'Assignments 7 Users' text at the bottom of the sidebar.

**User assignments table:**

<input type="checkbox"/>	Name ^	Department	Status ^	Required	Deadline	
<input type="checkbox"/>	Alexander Nørgaard	Company	●	✓	-	...
<input type="checkbox"/>	Anna-Karina Haugaard	Company	●	✗	-	...
<input type="checkbox"/>	Anthony Osborne Bridger		●	✓	-	...
<input type="checkbox"/>	Kenneth Jensen		●	✗	-	...
<input type="checkbox"/>	Matt Loades		●	✓	-	...
<input type="checkbox"/>	Nathan Hunt	Company	●	✓	-	...
<input type="checkbox"/>	Shae Joseph		●	✓	-	...

**Assign Users dialog:**

4 Selected

<input type="checkbox"/>	Name ^	Department	Teams ^	Status ^	Assigned ^
<input checked="" type="checkbox"/>	Adrian Daniels			●	✓
<input checked="" type="checkbox"/>	Alexander Nørgaard	Company	All Managers (Team)	●	✓

## Set a deadline to a Module

You can only add a Deadline to a Module while assigning the module. Select users who should be assigned to this Module and switch on the **Deadline toggle** <sup>1</sup>.

Simply choose the **Type of Deadline** and choose a **Date** from the Calendar <sup>2</sup>.

The Deadline will appear in the form of number of days till it expires on the Module cover.

## Set a Module as "Required"

Making a module as "Required" will mean that completing or not completing this module will have an impact on a user's Learning Index.

You can achieve this while assigning a Module or Program and toggle the **Required** option <sup>3</sup>.

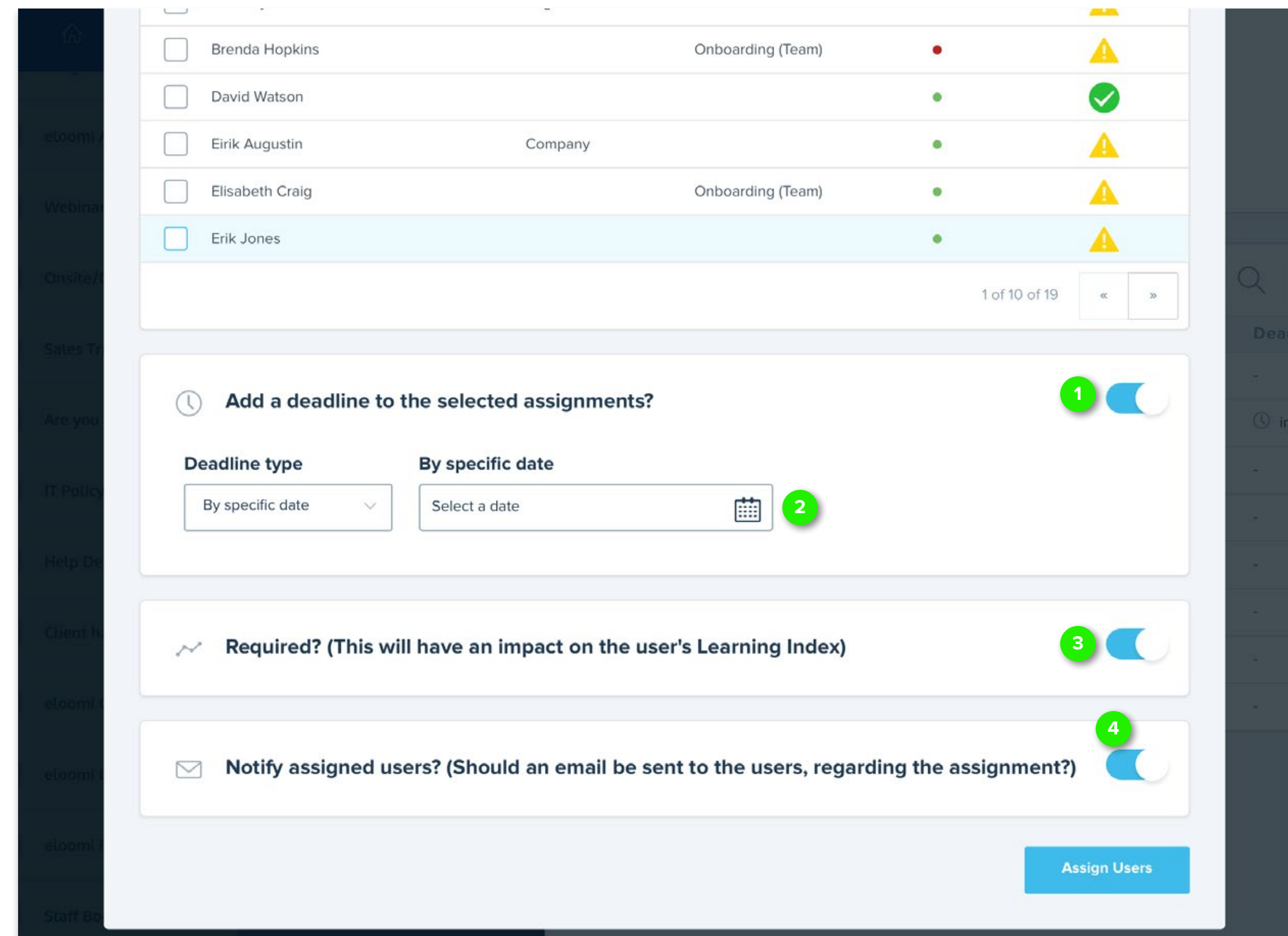
The module cover will have a tag that shows this Module is required.

## Notify users on Module assignment

In many cases, users need to be notified that a Module has been assigned.

You need to select the **Notify** users function <sup>4</sup> in order for an email to be sent to the users informing them that a module has been assigned.

In case you want to assign the users to a Module but do not want them to receive a notification you can leave this option as unchecked.



The screenshot shows the eloomi user assignment interface. At the top, there is a list of users with checkboxes and status indicators. The users listed are Brenda Hopkins, David Watson, Eirik Augustin, Elisabeth Craig, and Erik Jones. Below the list, there is a configuration panel with the following options:

- Add a deadline to the selected assignments?** (Toggle <sup>1</sup> is turned on)
- Deadline type:** A dropdown menu set to "By specific date".
- By specific date:** A date selection field with a calendar icon <sup>2</sup>.
- Required? (This will have an impact on the user's Learning Index)** (Toggle <sup>3</sup> is turned on)
- Notify assigned users? (Should an email be sent to the users, regarding the assignment?)** (Toggle <sup>4</sup> is turned on)

At the bottom right of the configuration panel, there is a blue button labeled "Assign Users".



## Important Symbols

We have placed many helpful symbols in the Assignment sidebar and assign new user pop-up which give information regarding whether a user is already assigned to a module, and whether the module is assigned as required or not.

### Assignment sidebar

- 1 **Required** - a module has been assigned to user as "required"
- 2 **Not required** - a module is assigned but "not required"

### Assign Users pop-up

- 3 **Not assigned** - while assigning new users, if you see yellow exclamation sign against a user, it means the user is not assigned to the module.
- 4 **Assigned** - alternatively, yellow check mark means the user is already assigned.

The image shows two parts of a user interface. On the left is a dark sidebar titled 'Module assignments' with a photo of a man and the word 'Creator' below it. On the right is a light-colored pop-up window titled 'Are you ready for GDPR?' with tabs for 'Users', 'Departments', and 'Teams'. The 'Users' tab is active, showing a table of 'User assignments' with columns for Name, Department, Status, Required, and Deadline. A search icon and an 'Assign users' button are at the top right of the table.

<input type="checkbox"/> Name	Department	Status	Required	Deadline
<input type="checkbox"/> Adrian Daniels		●	1 ✓	-
<input type="checkbox"/> Alexander Nørgaard	Company	●	2 ✗	🕒 in 3 days
<input type="checkbox"/> Anna-Karina Haugaard	Company	●	✗	-
<input type="checkbox"/> Anthony Osborne Bridger		●	✓	-
<input type="checkbox"/> David Watson		●	✗	-

The image shows a dark-themed pop-up window titled 'Assign Users' with a close button (X) in the top right. It contains a table with columns for Name, Department, Teams, Status, and Assigned. A search icon is in the top right of the table area.

<input type="checkbox"/> Name	Department	Teams	Status	Assigned
<input type="checkbox"/> Felix Molonfalean			●	3 ⚠
<input type="checkbox"/> Jane Andersson	Region 2		●	⚠
<input type="checkbox"/> Jonathan Ive	Company, Store 1		●	⚠
<input type="checkbox"/> Kenneth Jensen			●	4 ✓
<input type="checkbox"/> Matt Loades			●	✓
<input type="checkbox"/> Matthew Loades			●	⚠

# Edit an Assignment

In case a module has already been assigned to a user, but you want to make changes, for instance add a deadline or make the module Required for a particular user - you have the option to edit an assignment.

Open the Assign sidebar and hover the cursor over a user's name to reveal Action icons to the right **1**.

The Edit icon will allow you to set a deadline or make the module required **2**.

By selecting the Trash Can you can remove the module assignment from a user and he/she will not be able to see it on their My Learning pages anymore.

You can repeat both the Edit and Un-assign feature for multiple users - Select multiple users and these icons will appear top of the table **3**.

**Module assignments**

**Are you ready for GDPR?**

Users Departments Teams

**User assignments**

<input type="checkbox"/>	Name	Department	Status	Required	Deadline	Edit
<input type="checkbox"/>	Adrian Daniels		●	✓	-	<b>1</b> <input type="button" value="Edit"/> <input type="button" value="Trash"/>
<input type="checkbox"/>	Alexander Nørgaard	Company	●	✗	🕒 in 3 days	...
<input type="checkbox"/>	Anna-Karina Haugaard	Company	●	✗	-	...

**2 Edit**

🕒 **Add a deadline to the selected assignments?**

**Deadline type** **By specific date**

By specific da... Select a date

📈 **Required? (This will have an impact on the user's Learning Index)**

**Module assignments**

**Are you ready for GDPR?**

Users Departments Teams

3 Selected   **3**

<input type="checkbox"/>	Name	Department	Status	Required	Deadline	
<input checked="" type="checkbox"/>	Adrian Daniels		●	✓	-	...
<input checked="" type="checkbox"/>	Alexander Nørgaard	Company	●	✗	🕒 in 3 days	...
<input checked="" type="checkbox"/>	Anna-Karina Haugaard	Company	●	✗	-	...

# PROGRAMS



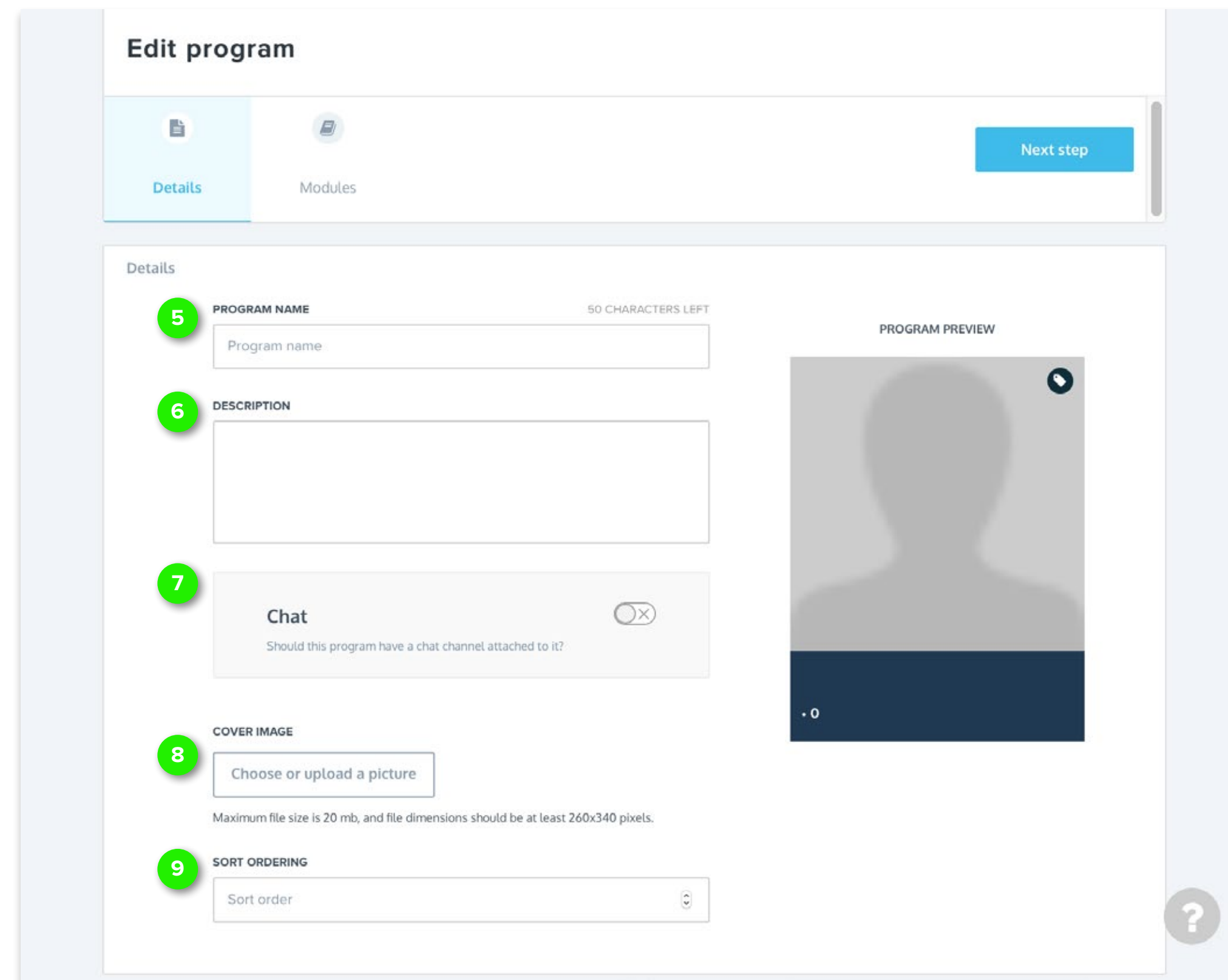
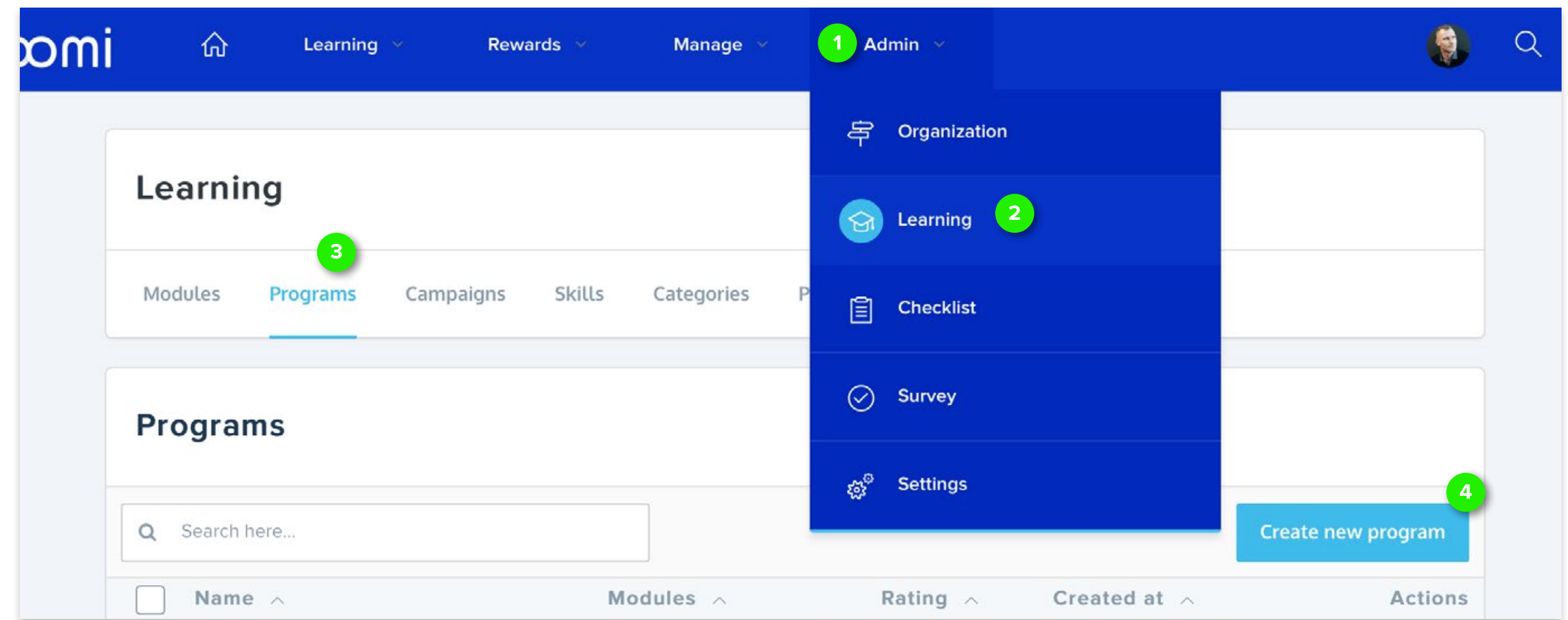
# CREATE A PROGRAM

A Program can consist of multiple Modules and is a great way to bundle together different online or onsite modules into a powerful Program.

To create, go to: **1 Admin** → **2 Learning** → **3 Programs** and click on **Create new program** button **4**.

On a Program, there are fewer **Details** compared to a Module:

- Set **name** for the Program **5**
- Add a **description** **6**
- Enable **chat** **7**
- Add a **cover image** **8**
- Specify **the order** it should appear on the Learning Overview **9**



## Add Modules to a Program

You can very easily add Modules to a Program by clicking on **1 Modules** → **2 Add module**.

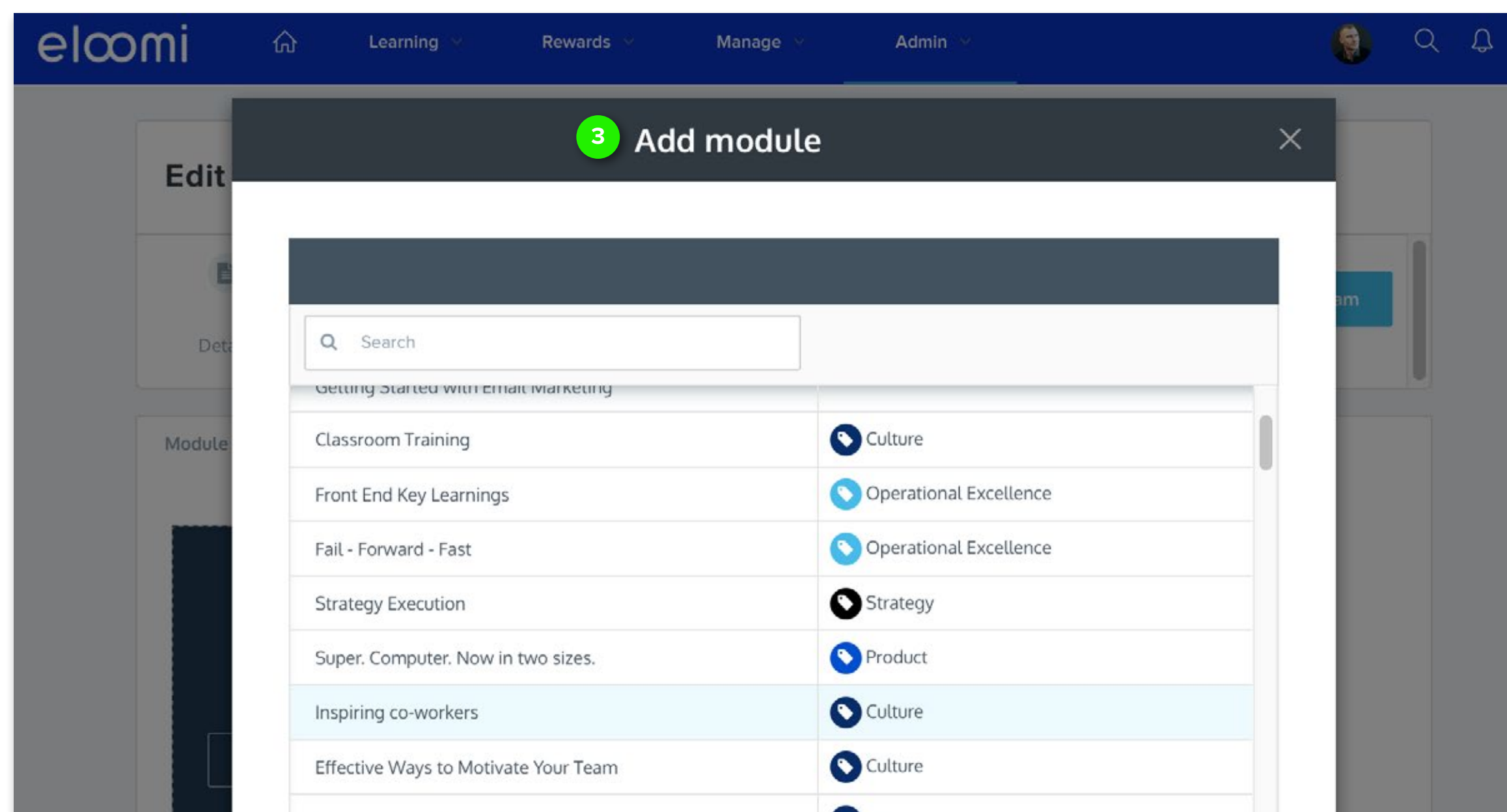
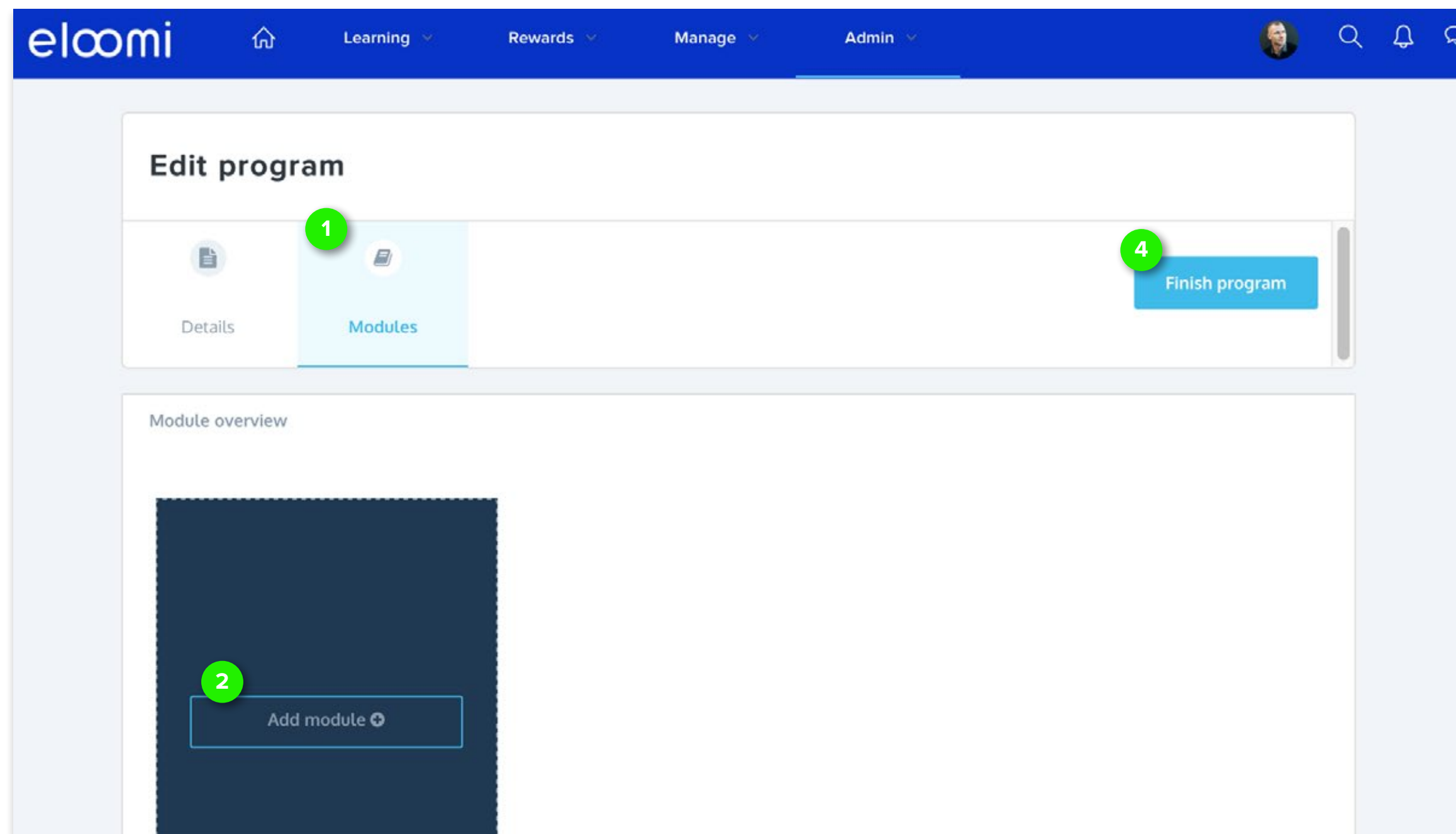
The pop-up appearing **3** will show you a full list of modules from your library. Just click on any module name to add it to the Program.

Once you are done adding Modules to Program, click on **Finish program** **4** to complete creating the Program.

You can now start assigning the Program to users.

### NOTE:

You can add the same module to different Programs but remember that Rules added in different Programs to the same Module might create conflicting Locking and Unlocking sequences for users.





## Adding Rules in a Program

Adding Rules to modules will allow you to control the learning path a user must take to complete their Learning.

Hover the cursor over a module and click on the option **Add rules** <sup>1</sup>.

### <sup>2</sup> **Unlock on specific date**

You can set a specific date when the module should be unlocked for users assigned to the Program

### <sup>3</sup> **Unlock after X days**

This rule will allow you to enter a specific number of days when the module will be unlocked for the users.

### <sup>4</sup> **Unlock after X days completion**

This rule will allow you to enter a specific date when the module will unlock after previous module being completed.

The screenshot displays the 'Edit program' interface in the eloomi system. At the top, there are tabs for 'Details' and 'Modules', with 'Modules' selected. A 'Finish program' button is visible in the top right. Below the tabs is a 'Module overview' section showing three modules: 'Onsite/Classroom Training', 'Webinar (eloomi)', and 'Classroom Training'. The 'Webinar (eloomi)' module is highlighted with a green circle '1' and has a 'Module rules' dropdown menu open, showing the rule 'After previous learning completed'. Below this, a 'Module rules' dialog box is open, listing five rules with corresponding toggle switches: 'Unlock on specific date' (toggle off), 'Unlock after X days assigned' (toggle off), 'Unlock after X days previous completion' (toggle off), and 'Require all previous modules are completed' (toggle on). The dialog box also includes 'Discard' and 'Save' buttons. The eloomi logo and navigation menu are visible at the top of the interface.



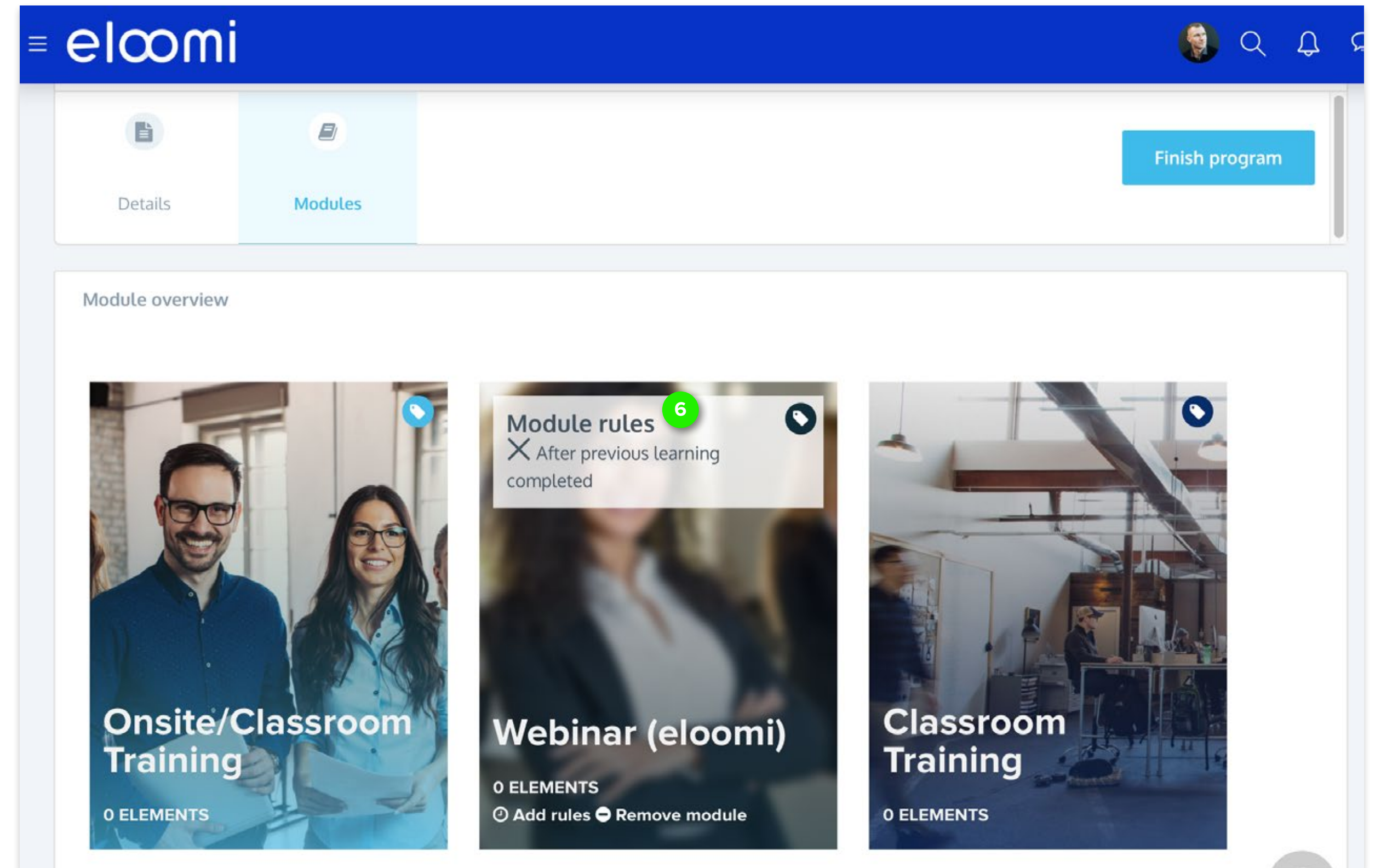
## 5 Require previous modules completed

Perhaps the most used rule, this allows you to ensure the user's follow the path created by you as an Admin.

This rule will only allow users to access a module once they have completed the previous one.

Remember to not set this rule on first module in a program, but the rest can have this rule.

Modules inside a Program that have a Rule will also show an indication of the rule on the module cover 6.



The screenshot displays the eLoomi user interface. At the top, there is a blue header with the 'eloomi' logo and navigation icons. Below the header, there are two tabs: 'Details' and 'Modules', with 'Modules' being the active tab. A 'Finish program' button is visible in the top right corner. The main content area is titled 'Module overview' and shows three module cards. The first card is 'Onsite/Classroom Training' with '0 ELEMENTS'. The second card is 'Webinar (eloomi)' with '0 ELEMENTS' and a 'Module rules' overlay. The overlay shows a green circle with the number '6' and a list of rules: 'X After previous learning completed'. Below the rules, there are options to 'Add rules' and 'Remove module'. The third card is 'Classroom Training' with '0 ELEMENTS'.

# ONSITE COURSE

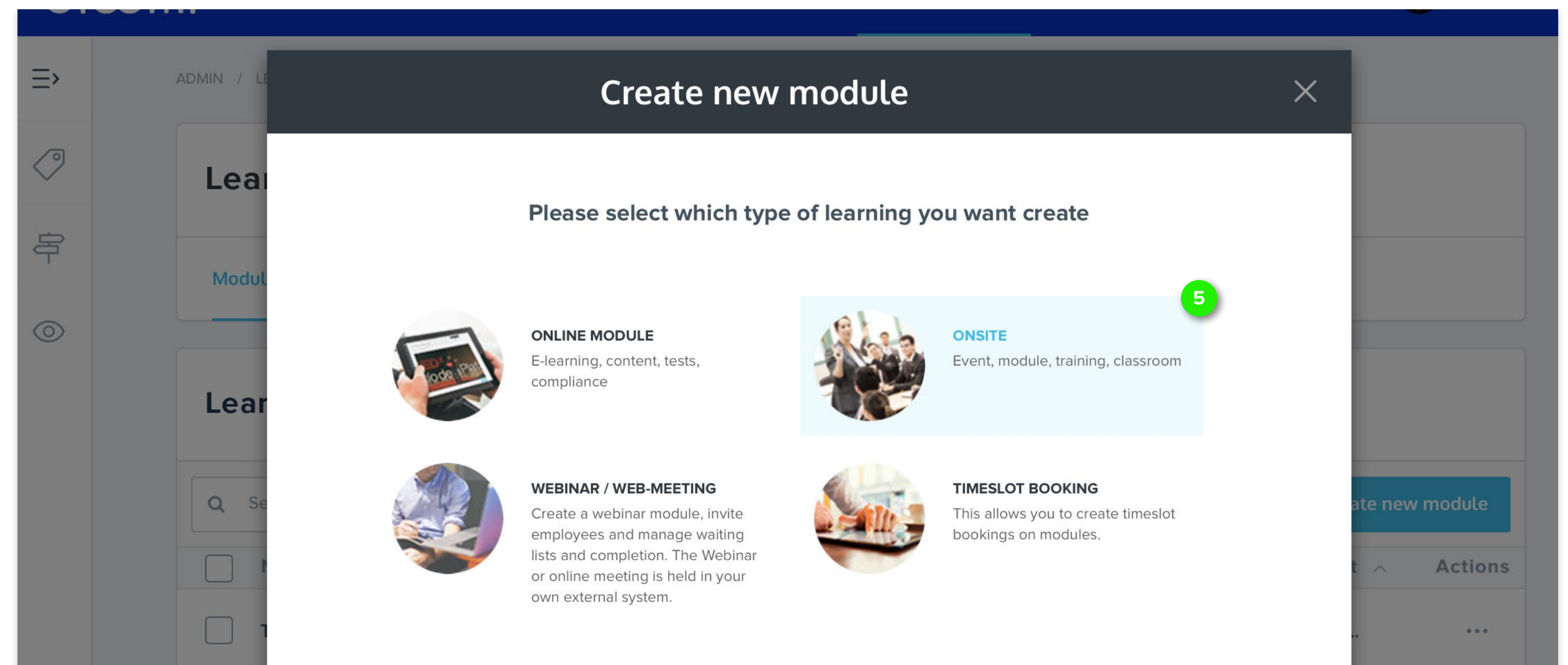
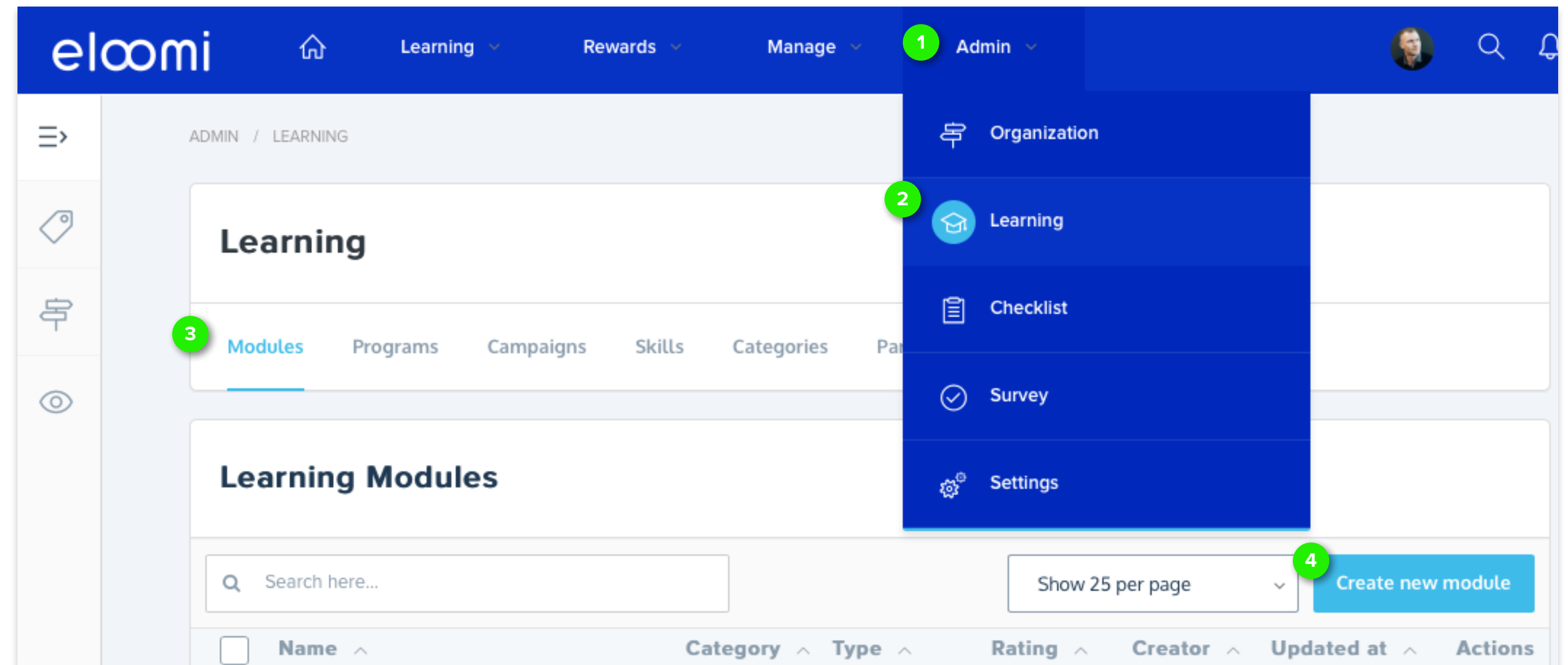
# CREATE AN ONSITE COURSE

**Onsite courses** are actual physical trainings that occur in a classroom, rather than online.

Following instruction will help you in creating an Onsite course in eloomi.

To create an Onsite course, go to: **1 Admin** ----> **2 Learning** ----> **3 Modules** and click on **4 Create new module**.

You will be asked the type of course you wish to create. Choose **5 Onsite module**.





# CREATE AN ONSITE COURSE

You can click on the **Save Progress** <sup>1</sup> icon or the **Next** icon to proceed at any stage of the process and your progress will be saved automatically.

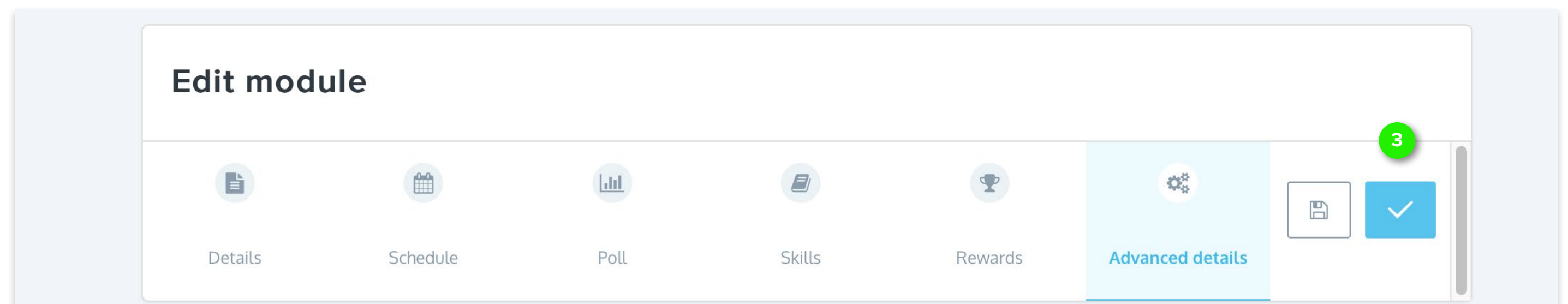
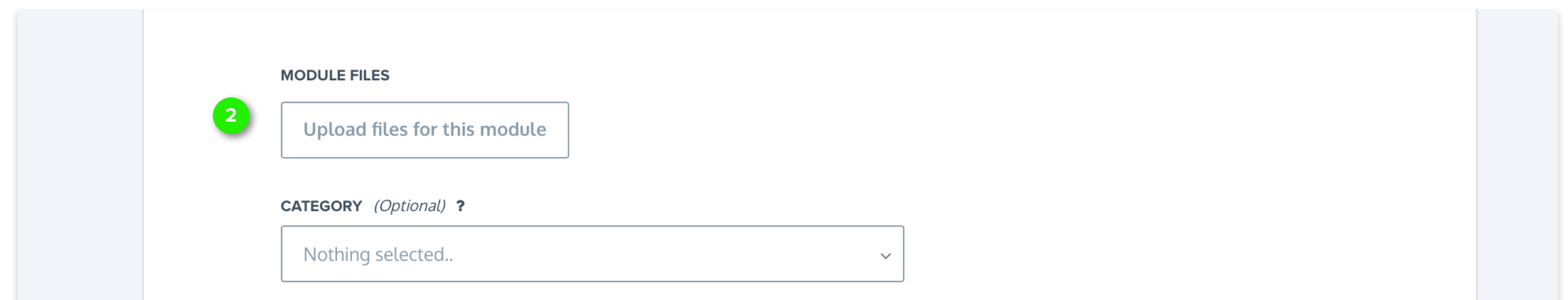
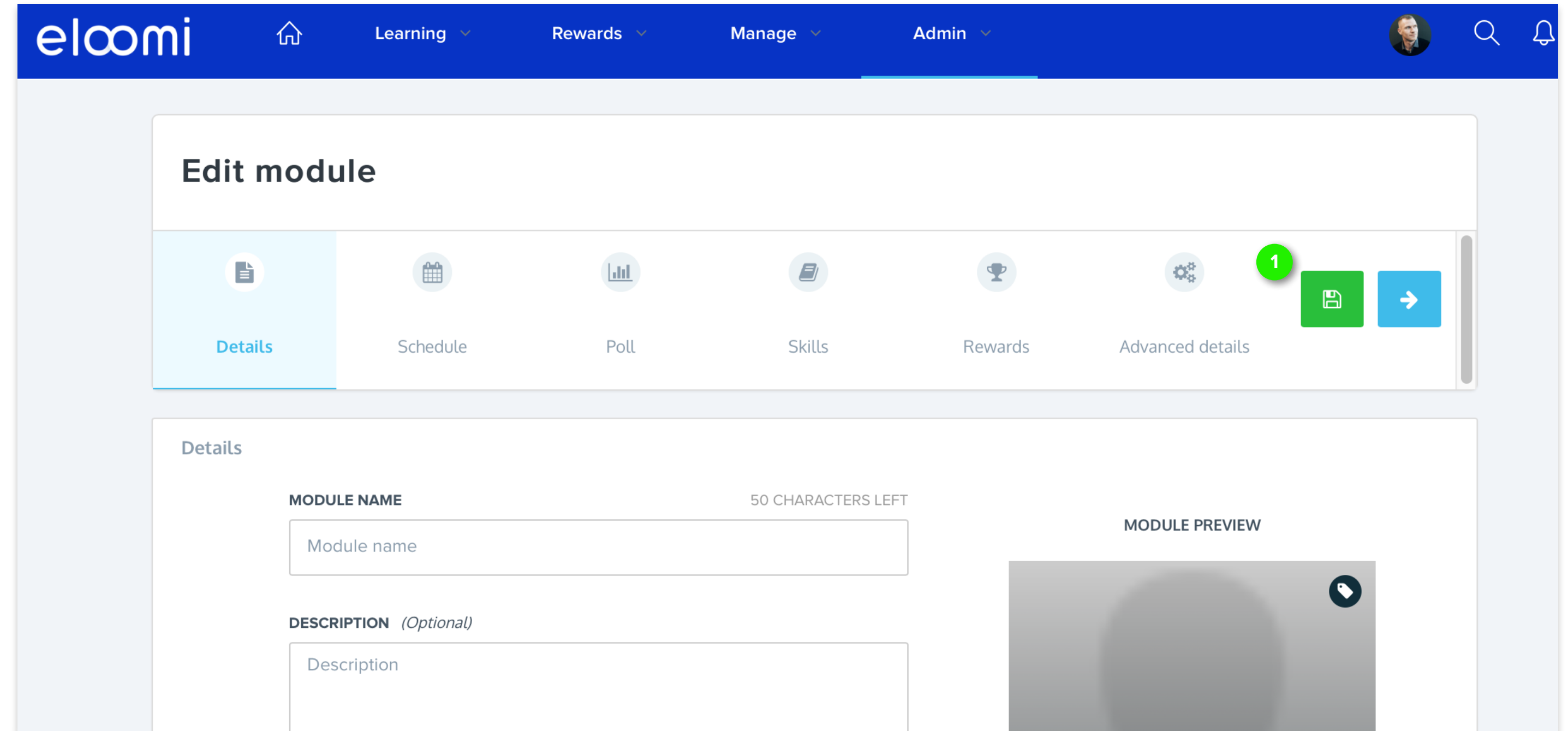
## Adding Files to an Onsite course

You can **upload material** <sup>2</sup> to an Onsite course which will be available for the user as downloadable files.

These could include Powerpoint presentations, PDF files, Excel or Word documents etc.

### **IMPORTANT:**

A Module will be considered **Active and Live** only if you press the **Blue Checkmark** <sup>3</sup> after finalizing all the details.



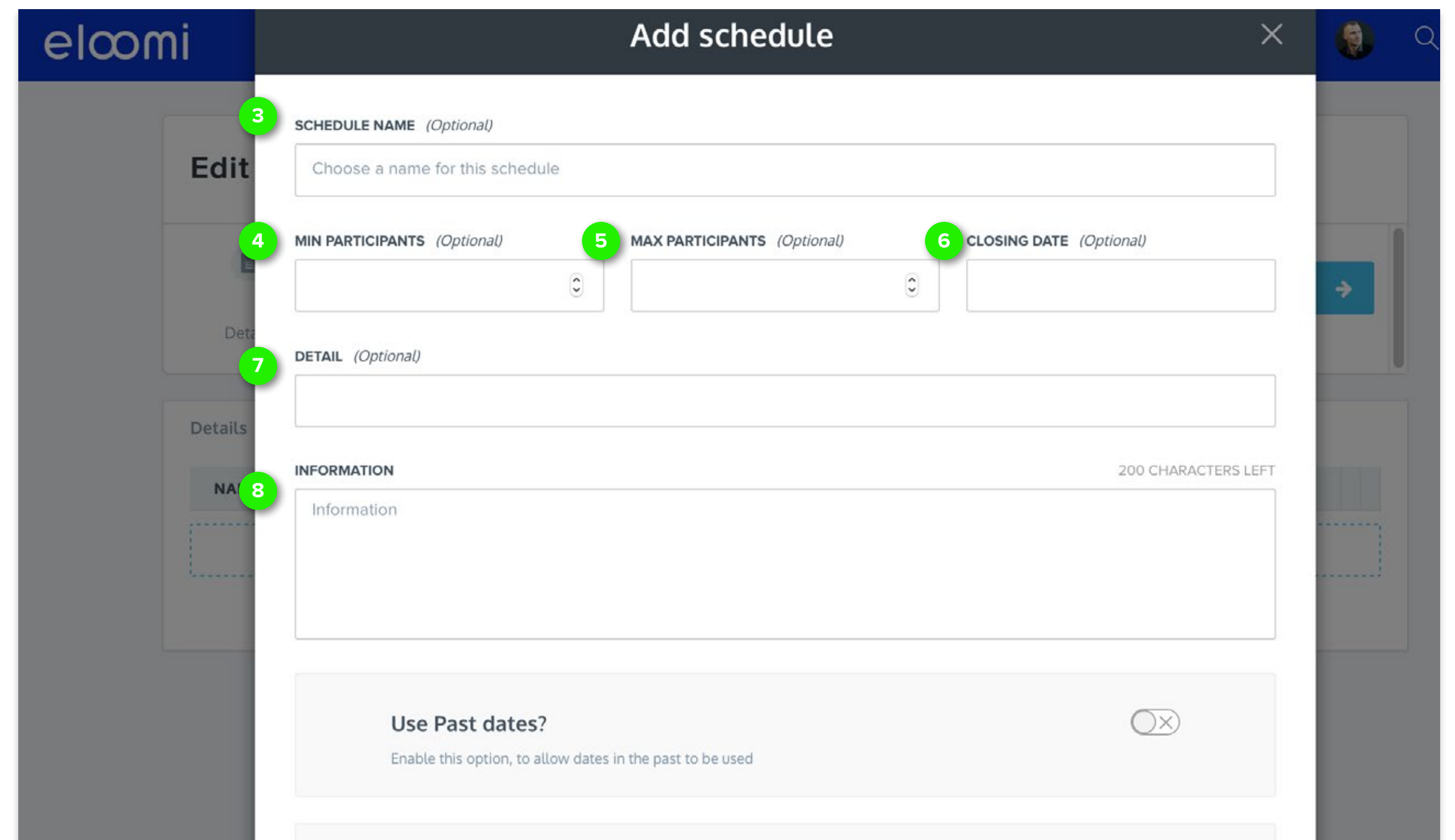
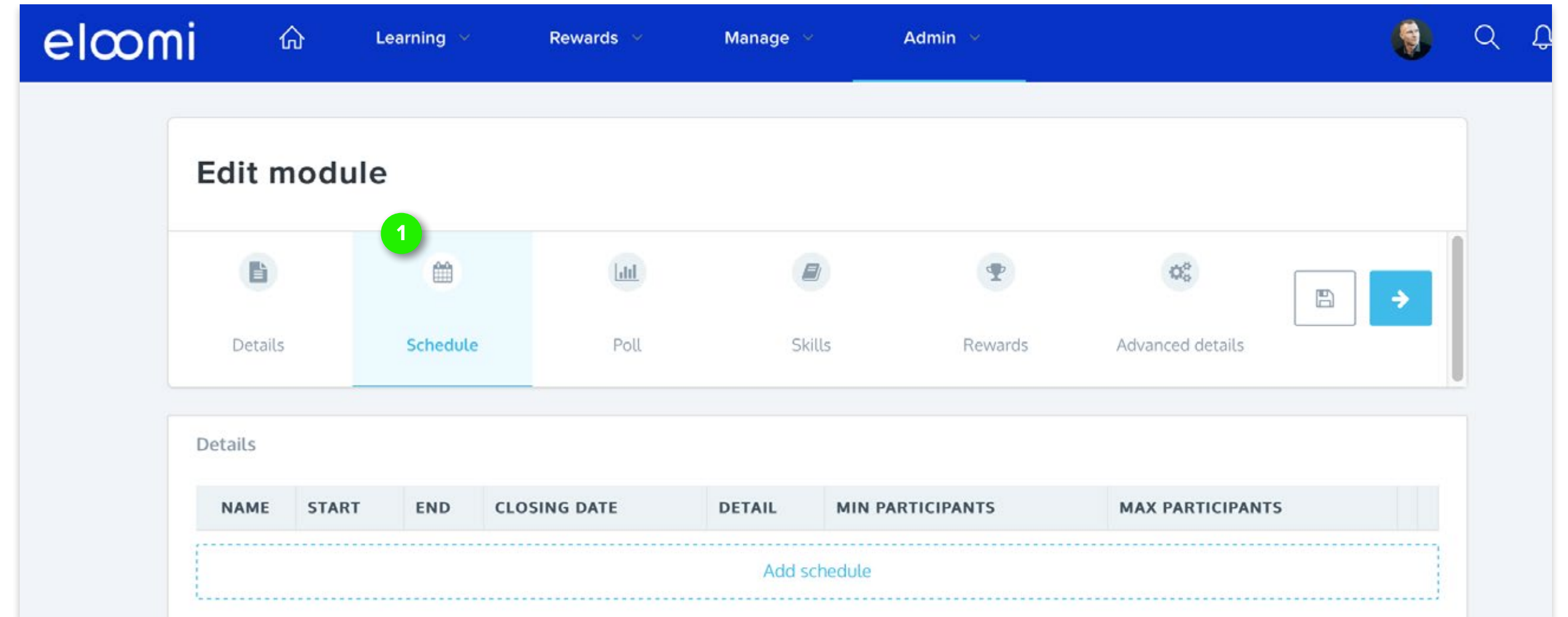
# SCHEDULE AN ONSITE COURSE

Adding a **Schedule** <sup>1</sup> to an Onsite course is probably the most important aspect of this feature.

You can start creating a schedule by clicking on **Add Schedule** <sup>2</sup> as illustrated.

Here you can:

- <sup>3</sup> Give the schedule a name (please consider this carefully as the course might have multiple schedules)
- <sup>4</sup> Minimum Participants option can be used in case you need to have a specific number of users before the course actually happens
- <sup>5</sup> Maximum Participants option can be used in case you have a limited number of available seats for the course
- <sup>6</sup> Using the Closing Date option will ensure that users are unable to sign up for this course after the date specified
- <sup>7</sup> Details regarding the Onsite course can be entered
- <sup>8</sup> Any additional information regarding the Course can be shared.



# Adding Dates/Timing/Location to a Schedule

Once a schedule has been created, now it is time to create dates, location and timings for when the training will take place.

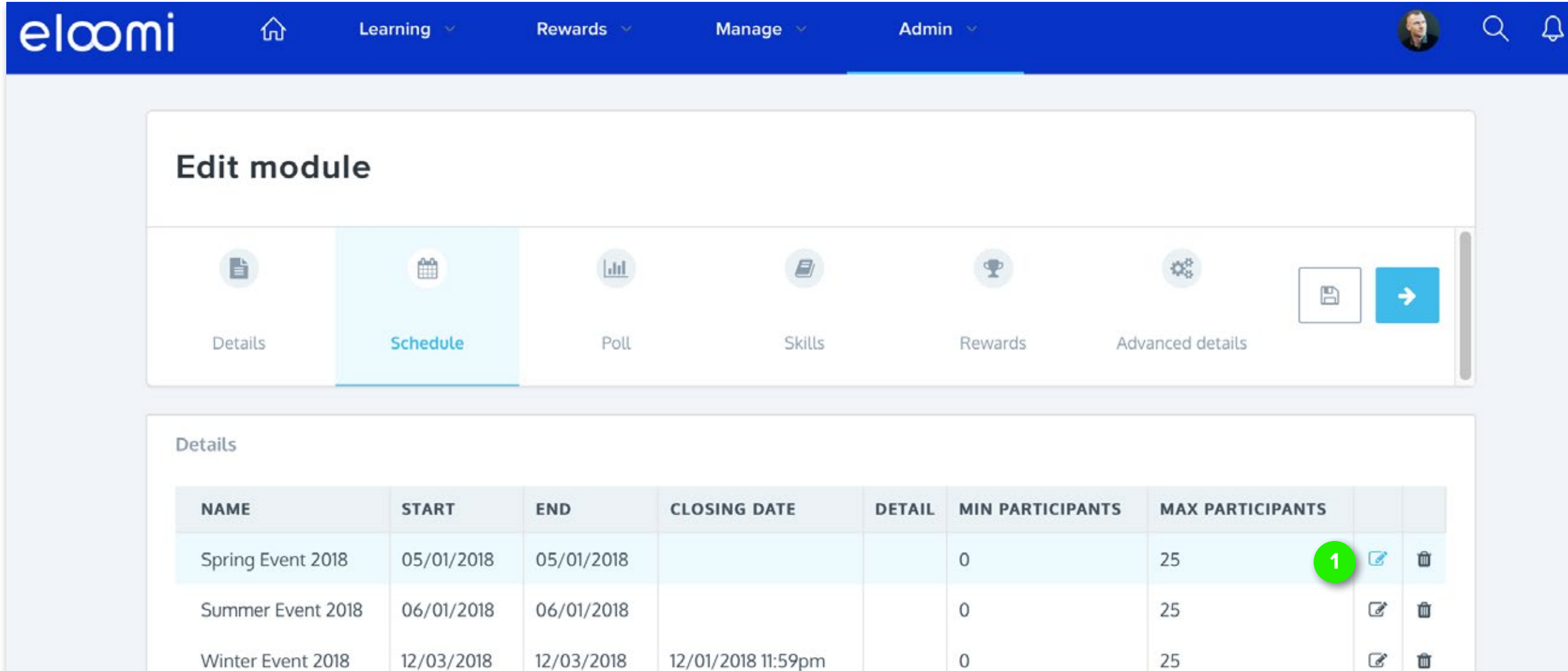
Click on the highlighted **edit option** <sup>1</sup> and you can now select **Add schedule day** <sup>1</sup>.

The pop-up that appears will allow you to:

- Choose a date when the actual training will be conducted
- Select a start and finish time
- Geo-tag the location where the training will be held by providing the address
- Include any details like building number etc.

## NOTE:

You can add multiple dates under the same schedule in case there are multiple dates for a particular schedule.

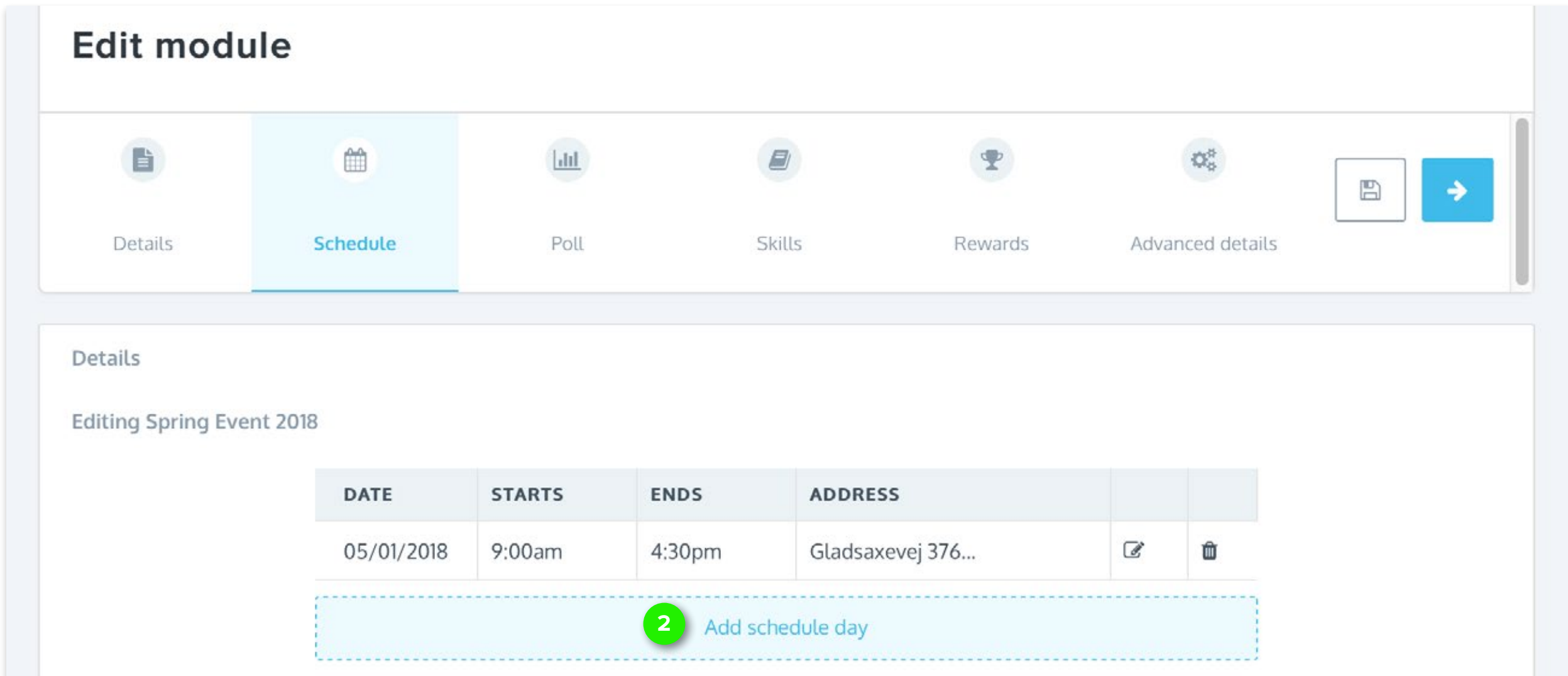


**Edit module**

Details | **Schedule** | Poll | Skills | Rewards | Advanced details

Details

NAME	START	END	CLOSING DATE	DETAIL	MIN PARTICIPANTS	MAX PARTICIPANTS			
Spring Event 2018	05/01/2018	05/01/2018			0	25	<sup>1</sup>		
Summer Event 2018	06/01/2018	06/01/2018			0	25			
Winter Event 2018	12/03/2018	12/03/2018	12/01/2018 11:59pm		0	25			



**Edit module**

Details | **Schedule** | Poll | Skills | Rewards | Advanced details

Details

Editing Spring Event 2018

DATE	STARTS	ENDS	ADDRESS		
05/01/2018	9:00am	4:30pm	Gladsaxevej 376...		

<sup>2</sup> Add schedule day



## 1 Using Participants List

It is highly recommended to use the Participants List feature on an Onsite course. This will allow you to monitor and track users sign up, force assigning users to an Onsite module and to mark users as present after the course has been held.

## 2 Contacts on an Onsite course

This feature will allow you to have a contact person available to the users who they can contact in case of any questions or concerns.

## 3 Attaching an ICS File

Enabling this feature will send an ICS or calendar file with the module sign up email, which gets sent when a user signs up for a course.

The ICS file can be saved and imported to a user's calendar (Outlook etc)

## 4 Adding Reminders to an Onsite course

You can add Reminders to an Onsite course - this will send a reminder email to users before the "actual course date".

The screenshot shows the eloomi admin interface. The top navigation bar includes 'eloomi', a home icon, and menu items for 'Learning', 'Rewards', 'Manage', and 'Admin'. The main content area displays several settings for an onsite course, each with a numbered green circle indicating the step:

- Use Past dates?**: A toggle switch is disabled (greyed out). Subtext: "Enable this option, to allow dates in the past to be used".
- 1 Use Participant list?**: A toggle switch is enabled (blue). Subtext: "Whether or not this schedule needs a waiting list".
- 2 Show contacts on module**: A toggle switch is enabled (blue). Subtext: "Whether or not the contacts should be visible for users on the module".
- 3 ICS File**: A toggle switch is enabled (blue). Subtext: "Include a calendar event ICS file on the module landing page?".
- 4 Add reminders?**: A toggle switch is disabled (greyed out). Subtext: "Whether or not this schedule needs reminders".

Below the settings is a 'Contact' section with a dashed blue box containing the text 'Add new contact'. At the bottom right, there is a blue button labeled 'Update schedule' and a grey help icon with a question mark.

## 1 Adding a Poll to an Onsite course

You can add a Poll to an Onsite course to achieve any specified purpose, for instance as your invitees to find out their meal preferences.

## 2 Modify Sign up Comment

You can customize a sign up comment or make it mandatory for users to leave a comment through this functionality.

The screenshot displays the 'eloomi' 'Edit module' interface. The top navigation bar includes 'eloomi', a home icon, and dropdown menus for 'Learning', 'Rewards', 'Manage', and 'Admin'. A user profile icon, search icon, and notification bell are on the right. Below the navigation is a horizontal menu with tabs: 'Details', 'Schedule', 'Poll' (highlighted with a green circle '1'), 'Skills', 'Rewards', and 'Advanced details'. The 'Poll' tab is active, showing a form with the following fields: 'POLL NAME' (containing 'Title of the RSVP'), 'OPTION #' (containing 'Option'), and a '+ Add option' button. Below the form is a 'Modify signup comment?' section with a toggle switch (highlighted with a green circle '2') and the text 'This allows you to change the text in the signup modal.' A help icon is visible in the bottom right corner.





In case you require further assistance with any of the above, please feel free to reach out to eloomi Help Desk

<https://helpdesk.eloomi.com>

**eloomi A/S**

Gladsaxevej 376, 2860 Soeborg  
Denmark

1 Old Street Yard, London EC1Y 8AF  
United Kingdom

+45 31 31 60 60

[www.eloomi.com](http://www.eloomi.com)