Kallidus User Guide

Step-by-step instructions for administrators of the Eversheds Learning Management System (LMS)
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Overview

User support
We have a range of support materials available for users, including instructions on how to navigate around the LMS. These materials are also useful for administrators and feature:

| Computer checker | An automated computer checker which will ensure users meet the basic system requirements in order to access our E-Learning. It is recommended you direct your users to this in the first instance of troubleshooting, as it will identify any missing software. |
| 'How to’ movies | These short movies provide users with a visual overview of the key tasks they can perform in our LMS. |
| User guide | A user guide is available for the users with instructions on how to sign in and access the training. |
| FAQ’s | We have a growing collection of learner-based frequently asked questions available. |

- Access to our support site is available here: www.eversheds.com/kallidususersupport
- Alternatively, everyone can access this site from within the LMS by selecting the ‘Support’ link from the black menu bar

Administrator support
We also have a range of dedicated support materials for client administrators. Following a similar format to the user support materials we have the following available:

| 'How to’ movies | These short movies provide administrators with a visual overview of the key administration tasks they can perform in our LMS. |
| User guide | The latest version of this administration guide is available online, and it’s recommended you obtain the latest version from our site instead of referring to a locally stored version. |
| FAQ’s | We have a growing collection of frequently asked questions available for client administrators to assist them in their role of supporting users. |
| Recorded training | Our recorded training session allows existing administrators to refresh their knowledge of the system when they desire. This solution is also incredibly useful for new client administrators to ensure they learn best practice. |
• Access to our support site is available here: www.eversheds.com/kallidusadminsupport
• Alternatively, administrators can access this site from within the LMS by selecting the ‘Administration support’ link from the black menu bar (not available to users)

Courses
Your courses will all be set up with the following naming convention:

<table>
<thead>
<tr>
<th>Format</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Name Course Name (Language)</td>
<td>Eversheds Anti-Bribery@Work (English)</td>
</tr>
</tbody>
</table>

Following this format will ensure it is easy to identify the courses, and will allow clients with multiple languages to work with the relevant course.

Course deadline
Prior to the initial launch of your training programme, we would have discussed the option of setting a course deadline. The benefit of a course deadline is to enable an automated reminder email to be sent to your learners within a specified timeframe.

Note: These reminders aren’t sent to users who have already successfully completed the course.
Note: This functionality works dynamically, so is completely dependent on the date in which the user was assigned to the course.

If you feel course deadline functionality would be of use then please contact the Eversheds E-Business team at e-learning@eversheds.com.
**Course emails**
As a bare minimum, each course will have a ‘welcome email’ associated with it. This email is sent to your users once they are assigned to the course.

Eversheds provides default welcome email text, however this can be personalised for your company, which is discussed and set-up prior to your initial launch.

Making use of the above mentioned course deadline functionality would also allow you to send out a reminder email automatically. This email is designed to remind users to complete the training.

If you wish to make any changes to your email text then please contact the Eversheds E-Business team at e-learning@eversheds.com.

**Administration tasks**

**Accessing the administration section**
- Log into the LMS ([https://lms.e2train.com/evershedsclients](https://lms.e2train.com/evershedsclients)) with your administrator account
- Select ‘Administration’ from the grey menu bar

- The administration section will display, providing you with access to the appropriate menus
Navigating around the LMS as an administrator

The screen shot below shows the main features of the client administrator role:

1. The administration button which provides you with access to all your admin tasks.
2. Access to create and manage users, as well as running individual user reports.
3. Access to run course-based reports.
**User**

**Searching for a user**
- Select ‘User’ from the main administration screen
- This screen will show you a list of all users you have access to administer
- To search for a specific user, enter your search criteria into the search area located in the bottom left hand corner of the screen. The different search items are described in the table on the next page

<table>
<thead>
<tr>
<th><strong>Search</strong></th>
<th>Enter your search criteria in this field, for example first name of the user.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Limit to</strong></td>
<td>You have the ability to search on certain fields available within the system, for example ‘email address’ or ‘surname’.</td>
</tr>
<tr>
<td><strong>Availability</strong></td>
<td>‘Enabled’ will provide you with active users, and ‘Not enabled’ with inactive users.</td>
</tr>
</tbody>
</table>

![User and Administration Screenshots](image-url)
**Password reset**

- Search for the user who requires a password reset and click on their name from the results table.
- The screen will refresh, providing you with additional information on the user.
- Select the 'Edit personal details and change the password' link just beneath the user's email address.

- A new window will appear providing you with the ability to change the user's password by clicking on the 'Change' button.

- Once the password has been changed, a system generated email will be sent to the user informing them of their new password.
Creating a new user and assigning training

- Select 'User' from the main administration screen
- From the bottom of the user list table, select the 'New' button
- A new window will appear where you need to populate the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Username</td>
<td>Username format for your company will be defined prior to your initial launch. Generally this will be the users email address, entered in lower case, however it could also be a mixture of company name, first name and last name. If you are unsure, please contact your key administrator or the Eversheds E-Business team (<a href="mailto:e-learning@eversheds.com">e-learning@eversheds.com</a>).</td>
</tr>
<tr>
<td>First name</td>
<td>The users first name (in title case).</td>
</tr>
<tr>
<td>Last name</td>
<td>The users last name (in title case).</td>
</tr>
<tr>
<td>Email</td>
<td>If your company is using their own password format then this field will need to be left blank, otherwise a system generated email will be sent to the user when you amend their password to suit your criteria. If this is the case then you’ll need to populate this field at a later stage, as covered further in these instructions. If you are using the systems default, randomly generated passwords, then this field can be populated at this stage. If you are unsure, please contact your key administrator or the Eversheds E-Business team (<a href="mailto:e-learning@eversheds.com">e-learning@eversheds.com</a>).</td>
</tr>
</tbody>
</table>

- If you are using the systems default, randomly generated passwords, then this field can be populated at this stage.
- All other fields can be left as they are. Select the 'submit' button
- A confirmation prompt will appear, select the 'return' button
- This second window will now close and you will be returned to the LMS with the ability to populate further information for the new user account. Populate the following:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>Enter their email address into the system – in lower case. The courses welcome email will be sent to the address you put in this field.</td>
</tr>
<tr>
<td>Primary group</td>
<td>For most clients this field will need to be left blank. However, if your company is segregating the users client administrators can see then you will need to choose the appropriate group from this drop down list.</td>
</tr>
<tr>
<td>Theme</td>
<td>This is the system language. Select 'Default' for English UK, or another appropriate value. Note that this will dictate the language of the system and any system generated emails.</td>
</tr>
</tbody>
</table>

- Once these fields have been populated, choose the 'Submit' button to save this information
- The screen will refresh, providing you with some more options. At this stage, if your company is using their own password format then this will need to be defined for the user. If you are using the systems default passwords then please move onto the next main bullet point. Alternatively, follow these indented bullet points:
  o Click on the 'Edit personal details and change the password' link
  o A second window will appear where you’ll firstly need to click on the ‘Change’ button and set the users password (based on your company’s requirements)
  o Once done select the ‘Change’ button. A prompt will appear confirming that the password has been changed, but no email sent. Select ‘Return’
  o Before closing this second window, populate the blank email field with the users email address. All forgotten password and password reset emails will be send to
the email address defined in this field which is why it couldn’t be populated until now
  o Select the ‘Save’ button and then the ‘Return’ button to close this additional window
  and return to the LMS

- In order to obtain comprehensive reporting data, you may need to specify some additional
  information for the user. These requirements will be defined prior to the initial launch and
  can be discussed with your key administrator of the Eversheds E-Business team (e-
  learning@eversheds.com) if required. To do this select ‘Information’ from the left hand
  menu
- The only information you may be required to populate under here (based on your
  requirements) is as follows:

<table>
<thead>
<tr>
<th>Employee number</th>
<th>This may hold the users HR or payroll ID which could benefit your reporting requirements.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job title</td>
<td>The users job title could be captured in this field.</td>
</tr>
<tr>
<td>Country</td>
<td>Specify the country in which the user is based.</td>
</tr>
<tr>
<td>Organisational group 1</td>
<td>These fields can capture any data, which will benefit reporting, for example office, division, department, or operation etc. Confirmation of what information to capture in these fields would have been agreed prior to your initial launch.</td>
</tr>
<tr>
<td>Organisational group 2</td>
<td></td>
</tr>
<tr>
<td>Organisational group 3</td>
<td></td>
</tr>
<tr>
<td>Language</td>
<td>Select the users language from the drop down list.</td>
</tr>
</tbody>
</table>

- Once you have populated this information, select the ‘Submit’ button
- The final step in creating a new user account is to assign them to the course. To do this
  select ‘Group: member’ from the left hand menu item

**Note:** If your company has made use of the ‘Primary group’ field (mentioned earlier) then you will see that the user is automatically assigned to the group you specified.

- Change the category drop down to ‘Course assignment’ to display all possible groups which
  will assign the training to your user
- You will also need to select the ‘All’ button to display all possible groups available
The groups available mirror the course titles exactly. Simply locate the course and appropriate language you wish to assign to the user, select the tick box and press the 'Submit' button.

**Note:** Once you select 'Submit' against the relevant course assignment group the user will be immediately assigned to the training and will receive the courses welcome email.
Deactivating a user

- Select ‘User’ from the main administration screen
- This screen will show you a list of all users. Search for the user you wish to deactivate based on the instructions under ‘searching for a user’
- Select the users name to open up their profile
- Scroll down to the ‘Optional Information’ section and tick the ‘Account is not enabled’ option
- Select the ‘Submit’ button

Running user based reports

- Select ‘User’ from the main administration screen
- This screen will show you a list of all the users. Search for the user you wish to report on based on the instructions under ‘searching for a user’
- Select the users name to open up their profile, then choose ‘Report’ from the left hand menu
- The screen will refresh and display the available reports. The most useful report is the ‘Training record’ one
- Before running a report, make a note of the report parameters at the top of the report table and select the appropriate options as follows:

  | Date range | Allows you to specify a data range for the report data. |
  | Report format | You have the choice of ‘HTML’ or ‘CSV’. HTML is suitable for a quick review, but CSV will export the data to Excel, so is better for further manipulation outside of the system. |
  | Score | The ability to report on the users latest attempt, or best attempt of the course. |

- Once you have specified the appropriate report options, simply select the report name to obtain the data

Note: User based reports will provide you with report data for the learner you are viewing. Course based reports allow you to report on all users who have been assigned to a course.
Course

**Running course based reports**

- Select ‘Course’ from the main administration screen
- This screen will show you a list of all the courses. Select the course you wish to report on
- Once the screen has refreshed with the course details, select ‘Report’ from the left hand menu
- The screen will refresh and display 6 reports. The most useful report is the ‘Training record’ one
- Before running a report, make a note of the report parameters at the top of the report table and select the appropriate options as follows:

<table>
<thead>
<tr>
<th>Date range</th>
<th>Allows you to specify a data range for the report data.</th>
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<tr>
<td>Report format</td>
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</tr>
<tr>
<td>Availability</td>
<td>This allows you to report on active or inactive learners.</td>
</tr>
<tr>
<td>Score</td>
<td>The ability to report on the users latest attempt, or best attempt of the course.</td>
</tr>
</tbody>
</table>

- Once you have specified the appropriate report options, simply select the report name to obtain the data

**Note:** Course based reports will provide you with report data for all learners who have been assigned to the course. User based reports allow you to report on an individual.