



Learn

End user guide model

Personalising this guide for your organisation

This end user guide is intended as a model for Kallidus customers to update according to their own internal processes. Please ensure that you read through it thoroughly and edit to suit your organisation and processes. The layout and design of this document has been deliberately kept plain and simple so that you are able to add your own branding to add your preferred style.

- Consider your audience – would more detailed or simplified instructions work better for them?
- Edit the language to suit your company tone of voice
- Change the term ‘Learn’ to the system name you will be using internally
- Add your company logo and use your company branding, colours or standard layouts
- Replace screenshots with imagery from your own system so that the branding and functions displayed match what your users will see. You may want to use a test user account with student only access for this.

Personalising this guide for your organisation

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- Delete functions or features that you are not planning to use from the contents list and appropriate slides
- Anything highlighted in yellow will need to be deleted or replaced as appropriate
- The FAQ/Contacts slide at the end of this document will need to be updated according to your organisational processes
- When you are happy with the wording and layout of the guide, save it as a PDF to send out to your users as part of your communications.
- **Please remember to remove these instructional slides before saving as PDF and providing to your users**

Learn: User Guide

Contents:

- Accessing Learn
- My Details
- Dashboard and Navigation
- My Courses
- Find Learning
- Course information
- Book an instructor led event
- Add external learning and reflections
- FAQ & Contacts

The screenshot shows the Kallidus user dashboard for Tom Jones. The top navigation bar includes the Kallidus logo, links for Home, My courses, All courses, and Add my learning, along with a search bar and user profile icons. The main content area is divided into several sections:

- Profile Section:** A dark blue header with a profile picture placeholder labeled "Upload your picture" and the name "Tom Jones". Below it is a "My bookings" section with the text "You don't have any bookings".
- Accreditations:** A section titled "Hello, Tom" showing "0/1 Accreditations complete 0%" with a "View accreditations" button.
- Course Progress Summary:** Three cards displaying: "You've got 4 courses left to do", "You've done 20% of the courses you have to do", and "You've done about 10h 20m of learning in the last 12 months". A "Go to my courses" button is located below these cards.
- Recommended courses:** A section titled "Recommended courses" with a "See all courses" button.
- Course Cards:** Three course cards are displayed, each with a star rating, title, lesson count, and a "See details" or "Start course" button.
 - Accounting basics:** 2 lessons (about 10 mins), "See details" button.
 - Allergy Awareness:** 3 lessons (from 1 hour 10 mins), "See details" button.
 - Asking The Right Questions Module:** 1 lesson (about 5 mins), "Start course" button.

At the bottom of the page, there are links for "Privacy policy" and "Cookie policy", and a copyright notice: "Copyright © 2022 Kallidus Limited".

Delete instructions as appropriate for your workflow(s) and ensure your screenshot reflects your workflow(s)

Accessing Learn

For access via single sign on:

Navigate to: [Insert URL/describe location](#)

If you are logged onto our network this will take you straight into the system to access your learning.

If you have any issues with access, please contact [XXX](#)

For access with username and password:

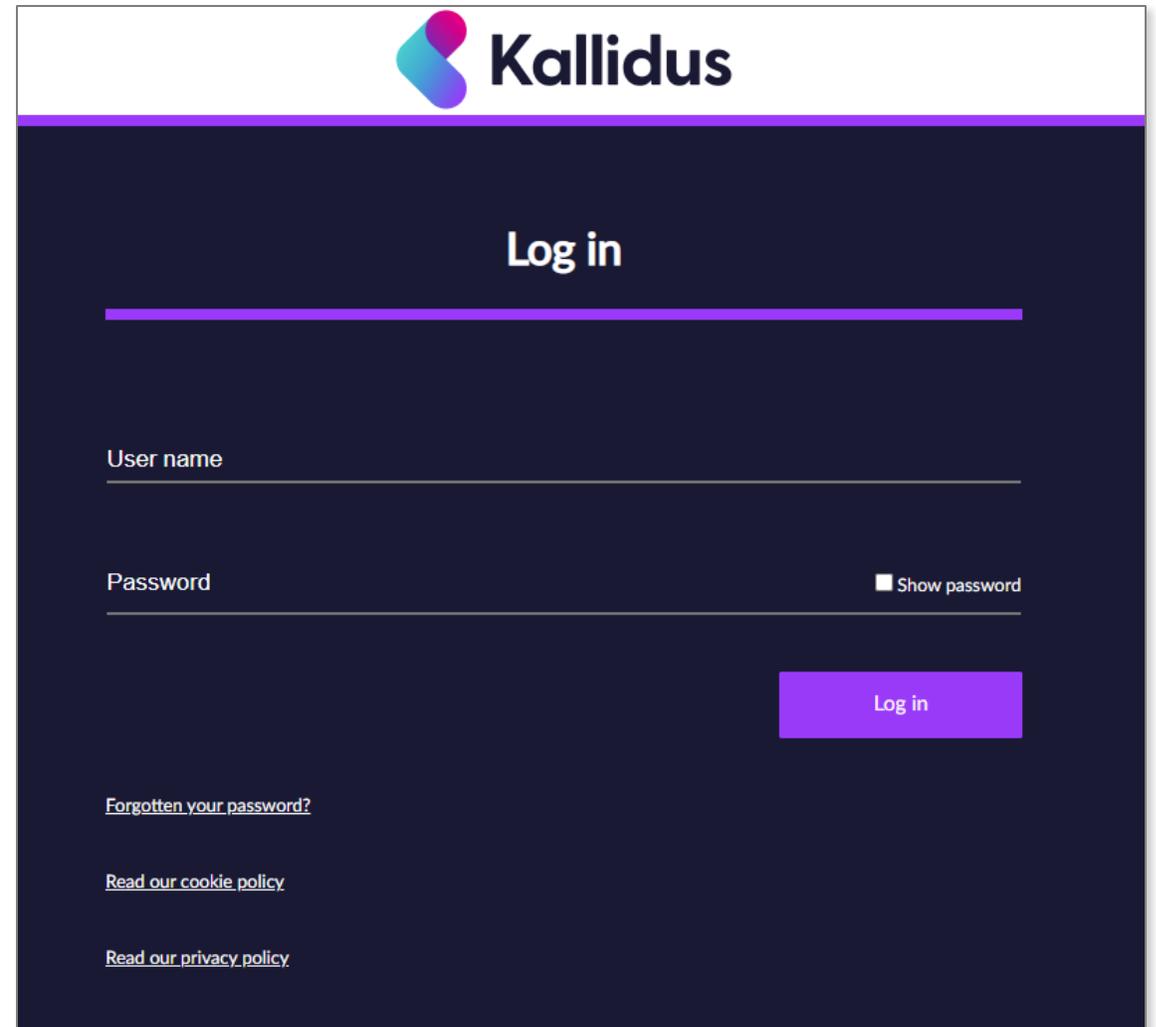
Navigate to: [Insert URL/describe location](#)

You will be prompted to enter the username and password that you have been supplied via email.

When you first attempt to log in, you will be asked to reset your password. Please ensure that you follow our cyber security guidelines when choosing your password.

You will also find a '[Forgotten your password?](#)' link here if you need to reset your password.

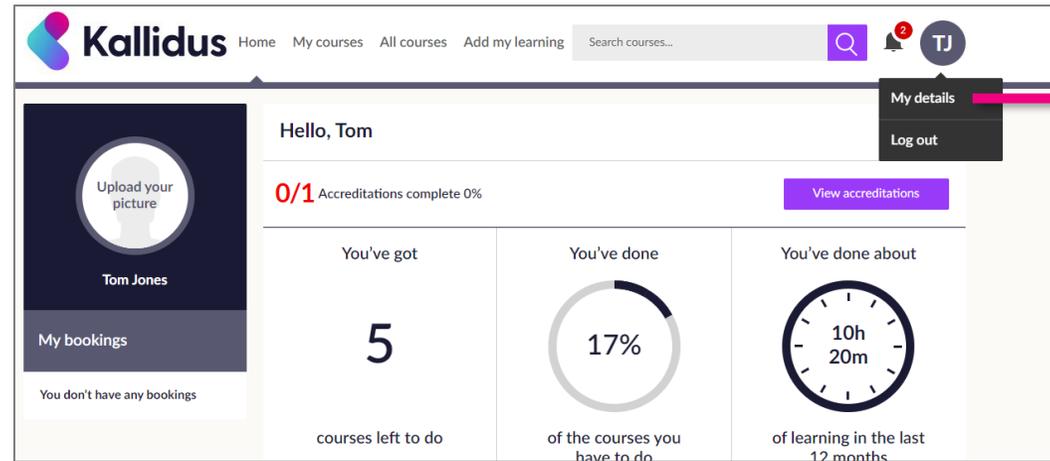
If you have any issues with access, please contact [XXX](#)



The screenshot shows the Kallidus login interface. At the top, the Kallidus logo is displayed. Below the logo, the text "Log in" is centered. A horizontal purple line separates the header from the login form. The form consists of two input fields: "User name" and "Password". To the right of the "Password" field, there is a checkbox labeled "Show password". Below the input fields, there is a purple "Log in" button. At the bottom of the page, there are three links: "[Forgotten your password?](#)", "[Read our cookie policy](#)", and "[Read our privacy policy](#)".

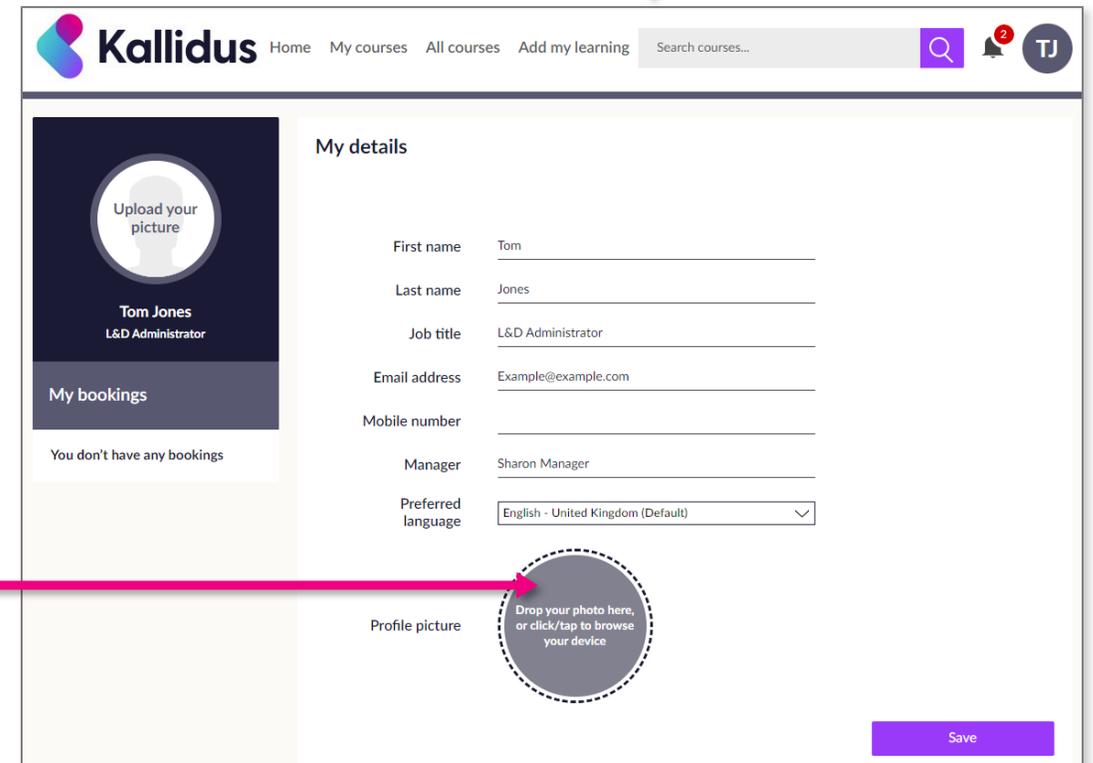
My Details

Access your details by clicking on your initials in the top right of the screen and selecting 'My details'.



Here you can view your profile information. If any of these details are incorrect, please contact **XXX**.

You can also upload a profile picture here. The image will need to be square.



Dashboard and Navigation

On the home page you will see your learning dashboard. This displays an overview of the learning you need to complete, learning you have completed and the approximate amount of time you have spent so far.

From this menu, you can access:

- 'My courses' (see next page for more detail)
- 'All courses' (all optional courses available to you)
- 'Add my learning' (to record external learning).

There is a basic search bar here where you can find learning based on keywords and topics (for more advanced search options see the 'Find Learning' section of this guide).

You will receive notifications via email and they will also be available to view and dismiss by selecting the bell icon.

Select the main dashboard icons to be taken to relevant courses.

If you have booked any instructor led events, you will see details of your next event here.

The screenshot shows the Kallidus dashboard interface. At the top, there is a navigation bar with the Kallidus logo, links for 'My courses', 'All courses', and 'Add my learning', a search bar with the placeholder text 'Search courses...', a magnifying glass icon, a notification bell icon with a red '3' badge, and a user profile icon. Below the navigation bar, the dashboard is personalized for 'Tom Jones, L&D Administrator'. It features a 'Hello, Tom' greeting, a progress indicator for '0/1 Accreditations complete 0%' with a 'View accreditations' button, and three summary cards: 'You've got 6 courses left to do', 'You've done 14% of the courses you have to do', and 'You've done about 10h 20m of learning in the last 12 months' with a 'Go to my courses' button. A 'My bookings' section lists a booked event: 'Booking Slips & Trips classroom' on '21 December' at '9am - 10am (GMT)' in 'Building 2'.

My Courses

This area shows you all courses that you need to complete, all courses you have chosen to start and all courses that you have completed. You will also have a list of accreditations that have been assigned to you.

The screenshot shows the Kallidus user interface for Tom Jones, an L&D Administrator. The 'My courses' tab is selected in the top navigation bar. On the left, there is a profile card with a 'Upload your picture' button and a 'My bookings' section that states 'You don't have any bookings'. The main content area is titled 'Tom's courses' and has a 'Print this screen' button. Below this, there are four tabs: 'My accreditations' (highlighted with a pink box), 'Courses I have to do', 'Courses I've chosen to do', and 'Courses I've done'. The 'My accreditations' tab is active, displaying a table with the following data:

Accreditation	Expiry date	Status	Last completed	
Accreditation test (SR)	09/11/2022	Overdue	07/11/2022	See details

Accreditations are lessons that need to be completed on a repeat cycle. You can keep track of your expiry dates, current status and most recent completion date in this dashboard.

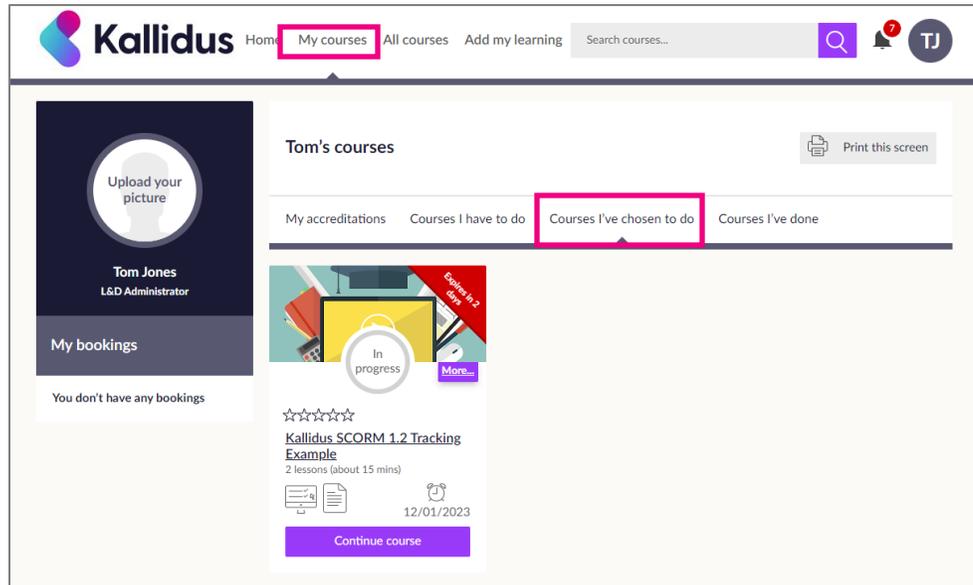
The screenshot shows the Kallidus user interface for Tom Jones, an L&D Administrator. The 'My courses' tab is selected in the top navigation bar. On the left, there is a profile card with a 'Upload your picture' button and a 'My bookings' section that states 'You don't have any bookings'. The main content area is titled 'Tom's courses' and has a 'Print this screen' button. Below this, there are four tabs: 'My accreditations', 'Courses I have to do' (highlighted with a pink box), 'Courses I've chosen to do', and 'Courses I've done'. The 'Courses I have to do' tab is active, displaying a list of mandatory learning items:

- Accounting basics**: 2 lessons (about 10 mins), status: **Overdue**. Includes a 'More...' button and a 'See details' button.
- Test deadline change for 1 person (SR)**: 1 lesson (about 10 mins), expires in 3 days, status: **Not started**, date: 13/01/2023. Includes a 'More...' button and a 'Launch link' button.
- Example Course**: 2 lessons (about 2 hrs), status: **Not started**. Includes a 'More...' button and a 'See details' button.

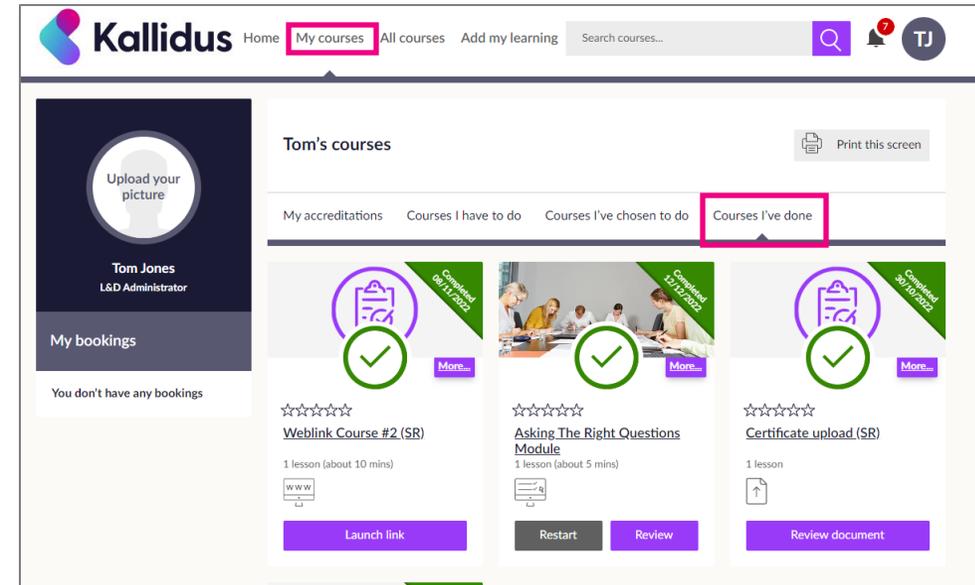
Courses I have to do displays all of your mandatory learning, along with due dates if they apply. Which courses you receive as mandatory is based on your HR information (for example job role, department or location). If you think that you have been assigned the wrong mandatory learning, please contact **XXX**.

My Courses

This area shows you all courses that you need to complete, all courses you have chosen to start and all courses that you have completed. You will also have a list of accreditations that have been assigned to you.



Courses I've chosen to do displays any optional learning that you have chosen to begin in addition to your mandatory learning. This will give you easy access to resume the course when you are ready to do so.



Courses I've done displays all courses that you have completed. If the lessons in these courses are part of an accreditation, they will move from here to *Courses I have to do* when it is time for you to refresh your learning. If you think that the courses listed here are incorrect, please contact XXX.

Find Learning

All courses will display catalogues of learning resources available to you.

Scroll through the catalogue contents or use the search functions to filter to specific topics.

Kallidus Home My courses All courses Add my learning Search courses...

Upload your picture
Tom Jones
L&D Administrator

My bookings

You have 1 course booked

Booking
Slips & Trips classroom

On this date
21 December

At this time
9am - 10am (GMT)

At this location
Building 2

Too much choice? Just show courses you're interested in...

Enter word or phrase... Any category Any duration

L&D Recommend

3LO E-Learning Course
4 lessons (about 2000 hrs)
3 lesson types
14/12/2022
See details

Kallidus SCORM 1.2 Tracking Example
2 lessons (about 15 mins)
07/01/2023
See details

Bite Size Learning

Allergy Awareness
3 lessons (from 1 hour 10 mins)
See details

Asking The Right Questions Module
1 lesson (about 5 mins)
Start course

Being Part Of Something Brilliant
2 lessons (about 2000 hrs 10 mins)
See details

Personal Development

Influencing and Persuading

Wherever you are in the system you will see this search bar. Use keywords and phrases to search for content on topics that you would like to learn about.

You will also find a more advanced search here. Filter the catalogues by entering key words or phrases, filter for different categories, or if you have limited time available you can search by duration.

Course information

Find out about a course by clicking on the title or 'See details' to view a description and more information about the course.



Not started

More...

☆☆☆☆☆

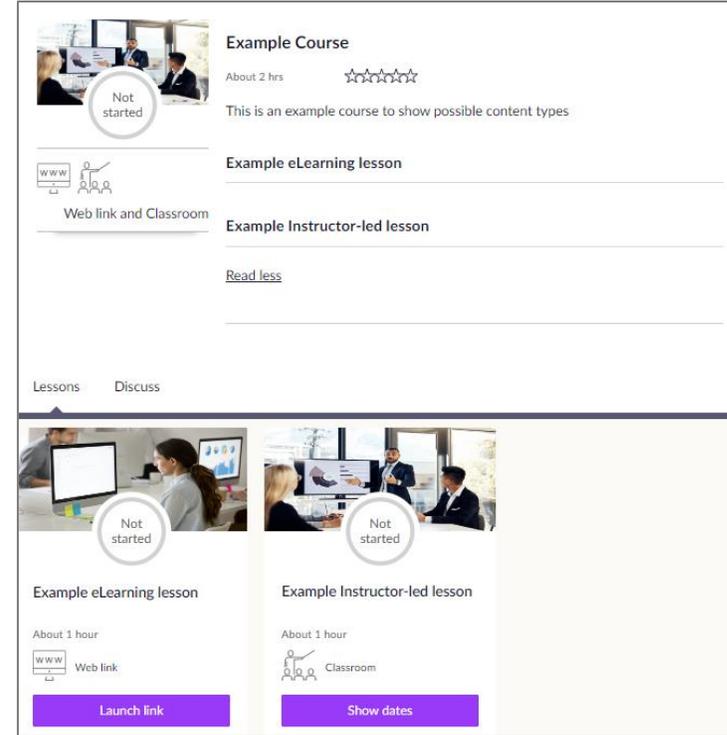
Example Course

2 lessons (about 2 hrs)

WWW Classroom

See details

You will see the lessons that are included in the course and icons indicating whether they are eLearning, classroom, weblink or document lessons.



Example Course

About 2 hrs ☆☆☆☆☆

This is an example course to show possible content types

Not started

WWW Classroom

Web link and Classroom

Example eLearning lesson

Example Instructor-led lesson

[Read less](#)

Lessons Discuss

Not started

Example eLearning lesson

About 1 hour

WWW Web link

Launch link

Not started

Example Instructor-led lesson

About 1 hour

Classroom

Show dates

Delete instructions as appropriate for your workflow(s) and ensure your screenshot reflects your workflow(s)

Book an instructor led event

No Approval required:

Click 'Show Dates' to see available event dates and times. Find an event you are able to attend and click 'Book' to secure your place on the event. You will receive a notification confirming your booking. If an event is fully booked, you may be offered the option to add your name to a waitlist in case a space becomes available on that date.

Course level approval required:

Click 'Ask for Approval'. Your approver will be notified of your request to attend the course and you will receive notifications to confirm whether your request has been approved. Once approved you will be able to view and select a date to attend.

Event level approval required:

Click 'Show Dates' to see available event dates and times.

Find an event you are able to attend and click 'Ask for Approval'. Your approver will be notified of your request and you will receive notifications to confirm whether your request has been approved. Once approved you will be automatically booked onto your chosen event and will receive a notification of your booking.

If no dates are currently available, click 'Send me new dates'. This will add you to a list to be notified when new dates are made available.

The screenshot displays a user interface for booking events. At the top, there are two event cards, each with a 'Not started' status indicator. The left card is for an 'Example eLearning lesson', which is 'About 1 hour' long and accessible via a 'Web link'. It features a 'Launch link' button. The right card is for an 'Example Instructor-led lesson', also 'About 1 hour' long, held in a 'Classroom'. It features a 'Show dates' button. A callout box from the 'Show dates' button shows a modal titled 'Dates available for 'Example Instructor-led lesson''. The modal contains a list of available dates: 'Thursday 22 Dec 2022' and 'Tuesday 24 Jan 2023', both for '1 day in total' at an 'Office' location from '9:00 am - 10:00 am (GMT)'. Each date entry has a 'Book' button. A link 'Send me new dates' is provided for users who do not see suitable dates.

Add My Learning & Reflections

You can record reflections about your learning or details of learning that you have completed externally in the 'Add My Learning' section

Kallidus Home My courses All courses Add my learning Search courses... [Search] [3] [TJ]

My learning [Print this screen] **Add learning**

Read a book? Been to a conference? Done some learning outside of this system? [Add your learning](#)

My reflections **Add a reflection**

Want to reflect on something you've learned about or done? [Add a reflection](#)

Tom Jones
L&D Administrator

My bookings

You have 1 course booked

Booking
Slips & Trips classroom

On this date
21 December

At this time
9am - 10am (GMT)

At this location
Building 2

Add a reflection

What did you do? (required)

Is this linked to a course you have taken? (optional)

Please select an option

When did you do it? (optional)

Why did you do it? (optional)

What did you learn from this? (optional)

How have or will you use this? (optional)

Any further action you're going to take? (optional)

Add Learning...

What learning did you do? *

Where did you do the learning?

What type of learning was it?

What Continuous Professional Development programme was it part of?

When did you finish the learning?

How long did you spend on the learning? hours minutes

Did you get a score for your learning? You can record it here

Would you like to upload evidence of your learning?

FAQ & Contacts

Question	Answer	Question	Answer
I have forgotten my password, what should I do?		Where are LMS emails/reminders sent?	
How is my dashboard populated?		For what purposes are my personal data processed and stored?	
What happens to my learning when I change job role?		What happens if I am on Long Term Sickness?	
I have taken an eLearning course and it is not showing as complete/passed, who should I contact?		I am experiencing issues with my username/password, who should I contact?	
I am experiencing issues with Single Sign On, who should I contact?		I am experiencing issues with the system being slow, who should I contact?	
I am experiencing issues with a page not loading, who should I contact?		Who can view my training history?	
How do I access the LMS from home?		Can I be exempt from any mandatory training?	
How do I add learning to my dashboard?		I cannot launch an eLearning course, who should I contact?	
How do I remove learning from my dashboard?			

For any queries not listed above please contact: