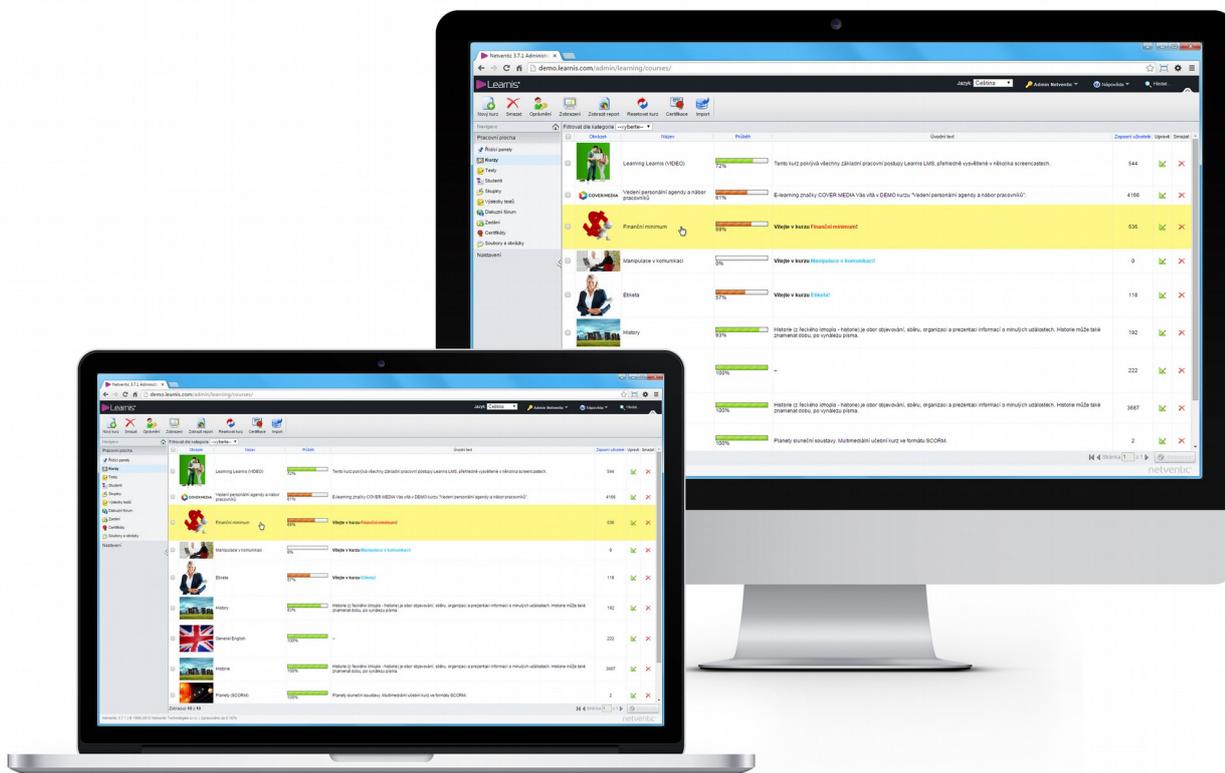


# TRAINER MANUAL

# Training with Learnis Cloud 5.5



English



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## Learnis account

### ***Sign in to Learnis admin***

*This apply to trainers and administrators.*

To sign in to Learnis admin with your account:

1. Visit your Learnis admin login page.
2. Enter your **User name**.
3. Enter your **Password**.
4. Click **Sign in**.

*Note: If you don't know the admin address, contact your Learnis administrator.*

### **Troubleshooting**

Most common issues causing problems:

- User name and passwords are case sensitive.
- When you copy & paste the user name and password, make sure there are no extra characters like white space at the start or end.
- You must use cookies enabled browser with JavaScript enabled.  
*Note: It's recommend to use latest Chrome or Firefox browser in default settings. To find out how to change settings, follow your browser manufacturer's instructions.*
- Make sure to use correct password.  
*Note: You can [reset your password](#).*
- Your account must exist and be active.  
*Note: To verify if your account was not suspended or deleted, contact your Learnis Administrator.*

### **Change your Learnis language settings**

*This apply to trainers and administrators.*

You can switch language of the Learnis admin.

To do that:

1. If you are on the Login page, click the language flag near the top right in **Login language** area
2. If you are already signed in, use menu **Language** in the top right.

*Note: Your the language preference are saved with your profile.*

### **Navigate to Learner portal**

*This apply to trainers and administrators.*

To open the Learner portal from the Learnis admin panel in a new browser tab:

1. Make sure you are being sing-in to Admin panel
2. Top right click on your **user name**.
3. Click first item in menu with a **hostname** of your instance.

## **Reset password – lost password**

*This apply to trainers and administrators.*

Did you lost your password and can't sing in to Learnis? You can reset your password via e-mail.

To reset your password:

1. Go to Sign in page on the Learner portal.
2. Click **Lost password?**
3. Enter your **User name or e-mail**.  
*Note: If your account has missing e-mail, contact your Learnis Administrator.*
4. Click **Submit**.
5. Sign in to your e-mail and get new messages.
6. Open e-mail from [support@netventic.com](mailto:support@netventic.com) with subject **Lost Password - Confirmation**.
7. Follow the instruction and **click the link**, the page will display a success message.  
*Note: Link is valid for 24 hrs.*
8. Open e-mail from [support@netventic.com](mailto:support@netventic.com) with subject **New password**.
9. Go to Sign in page on the Learner portal.
10. Sign in with your new password.

Important: It's recommend to [change your password](#) immediately.

If you can't login or experience issues with password reset, contact your Learnis Administrator.

## **Change your name and e-mail address**

*This apply to trainers and administrators.*

You can change your name, surname and e-mail address from My profile page.

1. Go to Learner portal of our Learnis instance.
2. Make sure to be signed in to your account.
3. In the top right, click **user icon**.
4. Click **My profile**.
5. Enter **Name**.
6. Enter **Surname**
7. Enter **E-mail**.
8. Click **Submit**.

*Note: Based on your Learnis settings, the My profile feature can be disabled. In this case contact your Learnis Administrator.*

## ***Change your password***

*This apply to trainers and administrators.*

For security reasons, you can change your password anytime:

1. Go to Learner portal of our Learnis instance.
2. Make sure to be signed in to your account.
3. Top right, click **user icon**.
4. Click **Change password**.
5. Enter **Current password**.
6. Enter **New Password**.
7. Click **Submit**.

On your next login use your new password.

## ***Sign out of Learnis***

*This apply to trainers and administrators.*

To sign out of Learnis on your computer:

1. Go to your Learnis.
2. In the top right, click **user icon**.
3. Click **Logout**.

## Manage courses & tests

### **Create a new course**

To create a new course:

1. Navigate to **Courses** page.
2. Click **New course** in the toolbar.
3. Fill in the **Name** of the course.
4. To provide an information about the course to the learners, add the **Course lead text** and the **Course summary**.
5. You can add course image using [+] icon on **Images** tab.
6. You can add trainer/s, forum and attachment/s.
7. Click **Save** in the toolbar to create the course.

### **Create lessons to organize course content**

To build a course content you need to add lessons in to it:

1. Navigate to **Courses** page.
2. Find the course and click **Edit** in the data grid row.
3. Click **New lesson** in the toolbar.
4. Enter the **Name** of the lesson.
5. Add the **Content** of the lesson using editor.
6. You can add test/s, assignment and attachment/s.
7. Click **Save** in the toolbar to create the lesson.

Notes:

- New lesson is added to the same level as initially selected lesson.
- You can navigate existing lessons using lessons panel on the left.

Tip: Save your time when adding many lessons and click **Save and new** in toolbar.

To learn how to add a SCORM content to your course, see chapter **Import and track SCORM modules**.

### **Manage course settings**

To check or change course settings:

1. Navigate to **Courses** page.
2. Find the course and click **Edit** in the data grid row.
3. Make sure the course is being selected in the lessons panel (not lesson).
4. Click **Properties** in the toolbar.
5. Change course settings according to your needs using **Settings** dialog.

- Click **Save and close** to apply changes.

## Course settings

The wide range of the course settings cover various training scenarios.

Find out what are the settings for:

Option	Default value	Description
<b>General</b>		
Learning path	Continuous	Control how the learner can proceed within the course: <b>Continuous</b> (recommended) – learner can proceed step by step only. Learner can return back to already visited lessons. <b>Continuous, learned</b> – learner is forced to mark current lesson as learned before he can continue to next lesson. Learner can return back to already visited and learned lessons. <b>Continuous, learned, tests passed – learner</b> is forced to mark current lesson as learned and to successfully pass all attached tests before he can continue to next lesson. Learner can return back to already visited and learned lessons. <b>Free</b> – all course lessons are freely available using course navigation.
Certification mode	Manual	Control if certificates are issues manually or automatically. <b>Manual</b> – certificates must be issued by you. <b>Automatic</b> – certificates are issued automatically <i>See <a href="#">Certificates of course completion</a> for more.</i>
Certificate template	Design 1	Control a template used to generate issued certificates.
Valid from	<i>empty</i>	Restrict course validity by date/time to control when the course is published. You can set reminder to mail a notification when the course goes live.
Valid to	<i>empty</i>	Restrict course validity by date/time to control when the course is no longer available. You can set reminder to mail a notification to alert the end of the course is coming.
Course category	<i>empty</i>	Add course category.
<b>Advanced</b>		
Published revision	Actual	By default, latest revision is used as actual live revision. You can switch to any older revision you want to publish.

## Manage lesson settings

To check or change lesson settings:

1. Navigate to **Courses** page.
2. Find the course and click **Edit** in the data grid row.
3. Make sure the lesson is being selected in the lessons panel (not course).
4. Click **Properties** in toolbar.
5. Change lesson settings according to your needs using **Settings** dialog.
6. Click **Save and close** to apply changes.

## Lesson settings

The wide range of the lesson settings cover various training scenarios.

Find out what are the settings for:

Option	Default value	Description
<b>General</b>		
Valid from	<i>empty</i>	Restrict lesson validity by date/time to control when the lesson is published. You can set reminder to mail a notification when the lesson goes live.
Valid to	<i>empty</i>	Restrict lesson validity by date/time to control when the lesson is no longer available. You can set reminder to mail a notification to alert the end of the lesson is coming.
<b>Advanced</b>		
Published revision	Actual	By default, latest revision is used as actual live revision. You can switch to any older revision you want to publish.

## Publish course to your learners

When you are ready you can publish your course to the learners.

Please mind, that publishing a course will also publish attached tests, forums, assignments and attachments.

Manage who can view your course and can enroll to it:

1. Click **Courses** in left menu
2. Find the course in listing and select it using checkbox
3. Click **Permissions** in the toolbar
4. To add user groups, click **Load items** under the **User groups** section.

5. To add learners, click **Load items** under the **Users** section.
6. Use checkbox to select one or more groups or learners and then click **Load items**.
7. You can add both groups and individual learners at the same time.
8. Click **Save and close** in the toolbar

Tip: You can also open the permissions settings dialog from the Courses page.

## **Preview courses and lessons**

To preview the course while editing the course:

1. Click **Save** in the toolbar to apply any changes.
2. To preview the current lesson, click **Preview** in the toolbar.
3. To preview other lesson, click the lesson name in course outline and click **Preview** in the toolbar.  
*Note: If the lesson cannot be viewed due to course navigation restrictions, you have to temporarily switch the learning path settings to “Free” mode in order to view it.*
4. To preview the course form the beginning, click the course name in course outline and click **Preview** in the toolbar.

Tip: To reset your progress in the course once you've enrolled to the course, use [course reset tool](#).

## **Organize lessons in your course**

You can organize lessons within your course using drag and drop:

1. Navigate to **Courses** page.
2. Find the course and click **Edit** in the data grid row.
3. To reorder lesson:
  - drag the lesson by it's name and drop it to new position.
4. To create a sub-lesson:
  - drag lesson by it's name and drop it to new position, while hover over the lesson name that should be a new parent lesson (note: node should be expanded prior to drop).

Tip: The position is saved automatically on drop so there is no need to save the course after each reorder.

## **Edit or delete lessons**

To edit or delete a lesson you must be either owner of a course or has edit permission.

### **Edit a lesson**

To edit the lesson in your course:

1. Click **Courses** in the left menu.
2. Find the course and click **Edit** in the data grid row.
3. Select the lesson you want to edit in the lessons panel.

4. Make your changes.
5. Click **Save** to apply the changes to a live course.

## Delete a lesson

When you delete the lesson:

- No one can access the lesson anymore.
- If the lesson has any sub-lessons, they will be deleted too.
- Attached forum, tests and assignments are not deleted.
- Important: Lesson deletion can't be undone.

To delete the lesson including any sub-lessons:

1. Click **Courses** in the left menu.
2. Find the course and click **Edit** in the data grid row.
3. Select the lesson you want to delete in the lessons panel.
4. Click **Delete** in toolbar.
5. Confirm the lesson deletion by clicking **OK** in the dialog.

Tip: You can also consider to [deactivate the lesson](#) instead of delete it.

## Deactivate your course

You can deactivate your courses without changing permissions:

1. Navigate to **Courses** page
2. Find the course and click **Edit** in the data grid row
3. Click button **Deactivate** in the toolbar

When you deactivate a course, it will become completely hidden to any learners and cannot be accessed or entered by any learner, even if they did enroll to it in the past.

To re-activate the course click **Activate** in the toolbar.

You can deactivate and activate a course as often as you want.

## Deactivate lessons

You can deactivate any lesson in your course:

1. Navigate to **Courses** page
2. Find the course and click **Edit** in the data grid row
3. Select the lesson by clicking on it's name in the lessons panel
4. Click **Deactivate** in the toolbar

When you deactivate a lesson, it will become completely hidden to any learners and cannot be accessed or entered by any learner, even if they did enroll to the course it in the past. Disabled lesson is also excluded from the course progress calculations.

To re-activate the lesson click **Activate** in the toolbar.

Tip: You can deactivate and activate a lesson as often as you want.

## Invite your learners to a course

To enroll learners in your course faster, you can send an e-mail to notify them about the course.

*Note: This feature require activation and additional configuration.*

Before you e-mail the invitation to the people, you should [give them the view permissions](#), otherwise they will have to contact you and ask for permissions later.

To create and send the e-mail message:

1. Navigate to **Courses** page.
2. Find the course and use checkbox to select it.
3. Click **Invite to course** in the toolbar to load an e-mail message.
4. You can change **Subject** and **Content** of the message.
5. Click **Recipients tab** and check the list.

*Note: People with having view permissions will be loaded automatically as recipients of the email invitation.*

6. To add people with Learnis account: click **Students**, **Administrators** or **Groups**, find and select users by checkbox and click **Load items**.  
*Note: Duplicate users, users with invalid e-mail addresses or users without addresses are remove from recipients list.*
7. To add people by e-mail address click **E-mail**, enter e-mail addresses (separated by semicolon) and click **OK**.
8. To remove people from recipients click **Remove**.
9. Click **Save** in the toolbar to create the message
10. Click **Run** in the toolbar to start sending.

Tip: You can check the mailing progress status on e-mailing page or the message detail on **Recipients** tab.

## Resend invitation

You can resend the invitation any time by repeating steps above.

If some people did enrolled already to the course, Learnis will exclude them from the recipients list automatically.

If you are adding more people manually, make sure they haven't enrolled already.

## Stop the mailing in progress

You can stop sending a messages:

1. From Admin dashboard, go to **E-mailing**.
2. Find the message and click **Edit**.
3. Click **Stop** in the toolbar.

Status of the message is changed to the “Stopped”.

## Troubleshooting

See [e-mailing troubleshooting](#).

### Course categories

Your course can be listed in one course category.

Note: Enabling course categories on a Learner portal require initial setup. In this case contact your Learnis Administrator.

### Add or edit category listing

To add a course to category:

1. Click **Courses** in left menu.
2. Find the course and click **Edit** in the data grid row
3. Click **Properties** in the toolbar
4. Click lookup icon aside **Course categories** input
5. Select the category from the list using checkbox
6. Click **Load items** in the toolbar
7. Click **Save and close** in the toolbar to apply changes

### Create your own category

You can create your own category:

1. Click **Course categories** in left menu.
2. Click **New category** in the toolbar.
3. Enter **Name**.
4. Click **Save** to create the category.

Please mind, that all active categories are visible to all learners on the Learner portal.

### Edit or delete your categories

To edit your category:

1. Click **Course categories** in left menu.
2. Find the category and click **Edit**.
3. Change **Name**.
4. Click **Save** to apply the changes.

To delete your category:

1. Click **Course categories** in left menu.
2. Find the category and click **Delete**.
3. Click **OK** in confirmation dialog.

## **Reset your course**

Reset tool delete all user's data related to your course:

- user's enrollment and course progress,
- user's visit history
- and all user's test attempts created within the current course.

Reset will not affect

- course data itself in any way – course and lesson content,
- course setting
- a certificates of completion.

Warning: Remember that deleting of user's data can not be undone and will affect all user's reports.

To reset a course:

1. Navigate to **Courses** page.
2. Find the course and select it using checkbox.
3. Click **Reset** in the toolbar.
4. Select individual learner/s using checkbox.
5. If you want to reset data of all learners, use checkbox above the listing to select all learners.
6. Click **Cleanup data**.
7. To confirm reset click **OK** in the dialog.

## **Edit or delete courses**

To edit or delete a course you must be either owner of a course or has edit permission.

### **Edit a course**

To edit the course:

1. Click **Courses** in the left menu.
2. Find the course and click **Edit** in the data grid row.
3. Make your changes.
4. Click **Save** to apply the changes to a live course.

### **Delete a course**

Tip: Before deleting the course, please consider [deactivating the course](#) instead.

When you delete the course:

- All lessons within the course are deleted.
- Also all data directly related to the course, for example reports, are permanently affected.
- Attached forum, tests, assignments and issued certificates are not deleted.
- Important: Course deletion can't be undone.

To delete single course:

1. Click **Courses** in the left menu.
2. Find the course and click **Delete** in the data grid row.
3. To confirm deletion click **OK** in the dialog.

Tip: You can also delete the course from the Courses page.

## To delete many courses at once

1. Click **Courses** in the left menu.
2. Find all the courses you want to delete and select them using checkboxes.
3. Click **Delete** in the toolbar.
4. To confirm deletion click **OK** in the dialog.

## Create a new test

To create a new test:

1. Navigate to **Tests** page
2. Click **New test** in the toolbar
3. Fill in the **Name** of the test
4. You can click **Test description** tab and enter the **Description** displayed on the test start page to the Learners
5. You can click **Feedback** tab and enter the feedback texts displayed after Learner complete the test based on test result (passed, failed or waiting for manual evaluation)
6. To save the test click **Save** in the toolbar

## Add questions to your test

Before you [publish your test](#) to the learners, you should add some questions to it.

If you haven't [created any questions yet](#), you will be able to create them during the process of adding, or you can build the questions database in advance.

To add questions from database of questions to your test:

1. Click **Tests** in left menu.
2. Find the test and click **Edit** in the data grid row.
3. Click tab **Question stack**.
4. Click **Load questions**, find the questions, select them using checkboxes and click **Load items**.  
*Note: When adding questions, duplicated questions are not removed (one question can be added multiple times into one times).*
5. If there are no questions yet, click **New question...** to [create a new question](#).
6. You can also load questions by ID/s – click **Load questions by ID** and enter ID/s (multiple IDs separated by semicolon) into the input and click **OK**.

7. Find question/s and select it using checkbox/es.
8. Click **Load items**.
9. Click **Save** in the toolbar.

## Reorder questions

You can control, how the test questions are ordered when learner run the test.

Note: If you use **Shuffle questions** option, the order doesn't apply.

To control the order:

1. Navigate to **Tests** page
2. Find the test and click **Edit** in the data grid row
3. On the tab **Question stack** use **Move** to drag question up or down to a new position
4. To save the test click **Save** in the toolbar

## Remove questions

1. Navigate to **Tests** page
2. Find the test and click **Edit** in the data grid row
3. Select question/s you want to remove using checkbox/es on **Question stack** tab
4. Click **Remove questions**
5. To save the test click **Save** in the toolbar

## Adjust test settings

Based on used questions and other settings like **Number of used questions**, it might be required to adjust a few settings:

- **Time limit** – if the test has more questions, the people should have more time to complete the test
- **Points required to passing test** – more question usually means more total points that can be acquired
- **Difficulty** – however this is just an informative flag, you can adjust it based on questions used

## Manage test settings

To check or change test settings:

1. Navigate to **Tests** page.
2. Find the test and click **Edit** in the data grid row.
3. Click **Properties** in the toolbar.
4. Change test settings – see the table below.
5. Click **Save and close** to apply changes.

## Test settings

The wide range of test settings cover various test scenarios.

Find out what are the settings for:

Option	Default value	Description
<b>General</b>		
Time limit [min]	45	A limit for your learners to finish the test. Learners can see the remaining time countdown. When time limit expire, the end of test is enforced.
Number of attempts	3	Maximal number of test attempts. For unlimited number of attempts keep empty. Warning: Deleting of test result will grant another attempt!
Points required to passing test	15	How much points must learner acquire to successfully pass the test.
Evaluation mode	Automatic	Automatic – test is evaluated automatically by system Manual – every test attempt will require <a href="#">manual test evaluation</a> by you
Difficulty	x	An informative value for your learners and co-educators.
<b>Test appearance</b>		
Questions per page	1	Number of question on one page.
All on one page	off	Show all questions on one page.
Shuffle questions	off	Generate tests with random order of questions.
Shuffle answers	off	Generate tests with random order of question answers.
Show question's point values	on	Learner can see the points he can acquire for each question during the test.
Allow travel	on	Learner can navigate in the test questions freely.
Use all questions	on	By default, the test is generated from all question loaded in the test stack pool.
Number of used questions	x	Number of questions used to generate the test. Questions are chosen randomly from questions stack pool.
<b>Answers appearance</b>		
Allow answers review	on	Learner is allowed to view the review of his answers when he complete the test.

Option	Default value	Description
Evaluate the accuracy of answers	2	Control if a learner can see the correct answers in the test review: 1 – Yes 2 – Only in case of successfully passing the test 3 – No
<b>Results appearance</b>		
Points	on	Control if learner can see score points acquired in the test when he complete the test.
Percents	on	Control if learner can see score in percents in the test when he complete the test.
Grade	on	Control if learner can see the grade acquired in the test when he complete the test. Note: This require to assign a grading scale.

## Organize tests

To organize your tests in Learnis, you can create folders to make files easier to find and load into tests.

## Create folders

To create a folder:

1. Click **Tests** in left menu.
2. Click **New folder** in the toolbar.
3. Enter folder name and click **OK**.

## Rename folders

To rename folder:

1. Click **Tests** in left menu.
2. Find and select the folder using checkbox.
3. Click **Rename** in the toolbar.
4. Enter name using **Folder** dialog.
5. Click **OK**.

## Move folders

To move test/s and/or folder/s within folders:

1. Click **Tests** in left menu.
2. Find and select the test or folder using checkbox.
3. Click **Move** in the toolbar.

4. Select target folder – where you want to move the folder.
5. Click **OK**.

## Delete folders

Important: If you delete the folder, all sub-folders and tests within the folder will be permanently deleted too! Deletion cannot be undone.

To delete the folder/s:

1. Click **Tests** in left menu.
2. Find and select the test or folder using checkbox.
3. Click **Delete** in the toolbar.
4. Confirm deletion by clicking **OK**.

## Disable folders view

1. Navigate to **Tests** page
2. Click link Folders: **Turn off**

To re-enable folders click link **Turn on**.

## Troubleshooting

- Folder not created or renamed – check name of the folder to match allowed chars only: a-z, A-Z, 0-9, \_ , - and .
- Folder not created or moved – check permissions on folder and target folder

## *Publish test to your learners*

There are two ways how to publish your test:

- Publish standalone test by granting permissions to learners.
- Attaching the test to the course and publishing that course by setting permissions.

## Publish a standalone test

Manage who can view your test:

1. Click **tests** in left menu
2. Find the test in listing and select it using checkbox
3. Click **Permissions** in the toolbar
4. To add user groups, click **Load items** under the **User groups** section.
5. To add learners, click **Load items** under the **Users** section.
6. Use checkbox to select one or more groups or learners and then click **Load items**.
7. You can add both groups and individual learners at the same time.

8. Click **Save and close** in the toolbar

Tip: You can also access Permissions settings from the Tests page.

## **Publish test with a course**

If the test is attached to the course, it will be published together with the course.

In this case, you don't have to manage the test's permissions at all – permissions of the test are inherited from the course permissions.

## ***Preview your tests***

To preview the test while editing:

1. Click **Save** in the toolbar to apply any changes.
2. Click **Preview** in the toolbar.

Note: Submitting test in preview mode create a test attempt in the same way as when the test is run by a learner. You can delete the attempts from the **Test results** page.

## ***Deactivate your test***

You can deactivate your test without need to change permissions:

1. Navigate to **Tests** page.
2. Find the test and click **Edit** in the data grid row.
3. Click button **Deactivate** in the toolbar.

When you deactivate a test, it will become completely hidden to any learners and cannot be accessed or entered by any learner, even if they have permissions. Disabled test is also excluded from the course progress calculations.

If the test is included in the course, the test will be also removed from score calculations.

To re-activate the test click **Activate** in the toolbar.

You can deactivate and activate a test as often as you want.

## ***Edit or delete tests***

To edit or delete a test you must be either owner of a test or has edit permission.

## **Edit a test**

To edit the test:

1. Click **Tests** in the left menu.
2. Find the test and click **Edit** in the data grid row.
3. Make your changes.
4. Click **Save** to apply the changes to a live test.

## Delete a test

Tip: Before deleting the test, please consider to [deactivate the test](#) instead.

When you delete the test:

- No one can access the test anymore.
- Test questions in the test are not deleted.
- Test results are not deleted.
- Important: Test deletion can't be undone.

To delete single test:

1. Click **Tests** in the left menu.
2. Find the test and click **Delete** in the data grid row.
3. To confirm deletion click **OK** in the dialog.

Tip: You can also delete the test from the Tests page.

## To delete many tests at once

1. Click **Tests** in the left menu.
2. Find all the tests you want to delete and select them using checkbox.
3. Click **Delete** in the toolbar.
4. To confirm deletion click **OK** in the dialog.

## Create a question

You can build a database of questions that can be used in any test or course. Learnis empower you to choose from 10 types of questions.

## Create a single-choice question

To create a question where learner choose one option:

1. Click **Questions** in the left menu – under the Tests.
2. Click **New question...** and click **Single choice**.
3. Click tab **General** and enter your **Question**.
4. Enter one or more **Answers** (options).
5. Mark correct answer by click a **Correct** switch.
6. Enter the **Points – if correct** value of correct answer.
7. To add more answers click **Add answer** below the Answers stack.
8. To remove answer click **Remove**.
9. Click **Save** to create a question.

## Create a multiple-choice question

To create a question where learner choose one or more options:

1. Click **Questions** in the left menu – under the Tests.
2. Click **New question...** and click **Multiple choice**.
3. Click tab **General** and enter your **Question**.
4. Enter one or more **Answers** (options).
5. Mark one or more answer as correct by click a **Correct** checkbox/es.
6. Enter the **Points – if correct** value of correct answer.
7. To add more answers click **Add answer** below the Answers stack.
8. To remove answer click **Remove**.
9. Click **Save** to create a question.

## Create a true/false question

To create a question where learner choose between true or false option:

1. Click **Questions** in the left menu – under the Tests.
2. Click **New question...** and click **True / False**.
3. Click tab **General** and enter your **Question**.
4. Mark correct answer by click a **Correct** switch.
5. Enter the **Points – if correct** value of correct answer.
6. Click **Save** to create a question.

## Create an exact answer question

To create a question where learner enter exactly what you type:

1. Click **Questions** in the left menu – under the Tests.
2. Click **New question...** and click **Exact answer**.
3. Click tab **General** and enter your **Question**.
4. Enter **Correct answer**.  
*Note: Question is correct when learner enter the exact string including white spaces and case.*
5. Enter the **Points – if correct** value of correct answer.
6. Click **Save** to create a question.

## Create a free answer question

To create a question where learner enter the answer with his own words:

1. Click **Questions** in the left menu – under the Tests.
2. Click **New question...** and click **Free answer**.

3. Click tab **General** and enter your **Question**.
4. You can enter **Correct answer**.
5. Click **Save** to create a question.

*Note: This type of question cannot be evaluated automatically.*

## Create an image hotspot question

To create a question where learner mark the area on the image:

1. Click **Questions** in the left menu – under the Tests.
2. Click **New question...** and click **Image hotspot**.
3. Click tab **General** and enter your **Question**.
4. Click **Load images**.
5. If your image is uploaded in the Media library, browse and find the image.
6. If your image is on your local device, click **New file**, click **Choose file**, browse and find the image, select it and click **Open**.
7. Select the image using checkbox.
8. Click **Load items**.
9. Click several times into the image to **create a polygonal area** to mark a correct spot.
10. You can undo last click by using **Ctrl + click** shortcut (or click click Step back).
11. To reset the hotspot click **Reset area**.
12. Enter the **Points – if correct** value of correct answer.
13. Click **Save** to create a question.

## Create an audio question

To create a question where learner listen to an audio:

1. Click **Questions** in the left menu – under the Tests.
2. Click **New question...** and click **Audio**.
3. Click tab **General** and enter your **Question**.
4. Click **Load file**.
5. If your audio file is uploaded in the Media library, browse and find the file.
6. If your audio file is on your local device, click **New file**, click **Choose file**, browse and find the file, select it and click **Open**.
7. Select the image using checkbox.
8. Click **Load items**.
9. Click **Save** to create a question.

*Note: This type of question cannot be evaluated automatically.*

## Create a fill in the blank question

To create a question where learner enter missing word or words into the blank space in the text:

1. Click **Questions** in the left menu – under the Tests.
2. Click **New question...** and click **Fill in the blank**.
3. Click tab **General** and enter your **Question**.
4. To mark words or phrases to fill, **replace the text** in the question word or words with the 5 or more underscores.  
*Example question: My dog \_\_\_\_\_fast! The frog can \_\_\_\_\_. The duck \_\_\_\_\_ swim.*
5. Enter the missing words or words in the corresponding order into the **Answers** (options).  
*Example: first answer: "is", second: "jump", third: "can".*
6. Enter the **Points – if correct** value of correct answer.
7. To add more answers click **Add answer** below the Answers stack.
8. To remove answer click **Remove**.
9. Click **Save** to create a question.

*Note: Answer is evaluated as correct when learner enter the exact string including white spaces and case.*

Tip: You can create longer input by using more underscores.

## Create a matching question

To create a question where learner match the options in two lists together:

1. Click **Questions** in the left menu – under the Tests.
2. Click **New question...** and click **Matching**.
3. Click tab **General** and enter your **Question**.
4. Enter matching phrase/s – **Left side** and **Right side** – for each answer (option).
5. Enter the **Points – if correct** value of correct answer.
6. To add more answers click **Add answer** below the Answers stack.
7. To remove answer click **Remove**.
8. Click **Save** to create a question.

Order of phrases in list are randomized when question is rendered to the learner.

## Create a matching question

To create a question where learner match the options in two lists together:

1. Click **Questions** in the left menu – under the Tests.
2. Click **New question...** and click **Matching**.
3. Click tab **General** and enter your **Question**.
4. Enter matching phrase/s – **Left side** and **Right side** – for each answer (option).
5. Enter the **Points – if correct** value of correct answer.

6. To add more answers click **Add answer** below the Answers stack.
7. To remove answer click **Remove**.
8. Click **Save** to create a question.

Order of phrases in list are randomized when question is rendered to the learner.

## Create a translate / synonym question

To create a question where learner reveal phrases in a list:

1. Click **Questions** in the left menu – under the Tests.
2. Click **New question...** and click **Matching**.
3. Click tab **General** and enter your **Question**.
4. Enter matching phrase/s – **Left side** and **Right side** – for each answer (option).
5. Enter the **Points – if correct** value of correct answer.
6. To add more answers click **Add answer** below the Answers stack.
7. To remove answer click **Remove**.
8. Click **Save** to create a question.

*Note: This type of question is not evaluated automatically.*

Left side of the list is revealed when the question is rendered. Right side is revealed after learner click.

## Options to penalize the learner

You can set a question to use negative points to be subtracted from test score:

1. To penalize Learner for submitting incorrect answer enter points using **Points – if wrong**.
2. To penalize Learner for not submitting any answer click tab **Advanced**, enter **Points earned when student did not marked any answer** and click **Apply** checkbox.

## Manage a question database

You can organize your question database using folders.

### Create a folder

To create a new folder:

1. Click **Questions** in left menu (under Tests).
2. If there are some folders already, navigate to folder where you want to create your new folder.
3. Click **New folder** in the toolbar.
4. Enter folder name into **New folder** dialog.
5. Click **OK**.

## Rename a folder

To rename existing folder:

1. Click **Questions** in left menu (under Tests).
2. Find a folder and select it using checkbox.
3. Click **Rename** in the toolbar.
4. Enter name using **Folder** dialog.
5. Click **OK**.

## Move questions or folders

If you move the folder/s, all the sub-folders and questions within the folder will be moved too.

To move question/s or folder/s around:

1. Click **Questions** in left menu (under Tests).
2. Find a question/s or folder/s and select it using checkbox/es.
3. Click **Move** in the toolbar.
4. Select target folder using **Move** dialog.
5. Click **OK**.

## Edit a question

To edit your question:

1. Click **Questions** in left menu (under Tests).
2. Find the question or folder and click **Edit icon** in the data grid row.
3. Click **Save** to apply your changes.

## Delete questions or folders

Important: If you delete the folder/s, all the sub-folders and questions within the folder will be deleted too. Deletion cannot be undone!

To delete single question or folder:

1. Click **Questions** in left menu (under Tests).
2. Find the question or folder and click **Delete icon** in the data grid row.
3. Confirm deletion click **OK** in the dialog.

To delete many questions and folders:

4. Find a questions and folders and select it using checkbox.
5. Click **Delete** in the toolbar.
6. Confirm deletion by clicking **OK** in the dialog

Tip: You can also delete a question from question page when editing it.

## Disable folder view

You can disable folders by clicking link **Turn off**, to re-enable folders click link **Turn on**.

The questions will be listed without folders.

## Troubleshooting

- Folder not created or renamed – check name of the folder to match allowed chars only: a-z, A-Z, 0-9, \_ , - and .
- Folder not created or moved – check permissions on folder you want to move and on target folder

## *Manual test evaluation and score correction*

By default, a test is set to be automatically evaluated and there is no need of doing anything from your part as Learnis automate the testing for you.

You can:

- Evaluate a test set to manual evaluation mode.
- Evaluate a questions of types that cannot be automatically evaluated, like free answer.
- Make a score correction.

To manually evaluate the test or correct a test score:

1. Navigate to **Test results** page.
2. Find the forum and click **Edit** in the data grid row.
3. To change points on question level click link **Correction** and enter new value.
4. To change total points on test level use input **Total point correction**.
5. You can provide feedback to the Learner using input **Attach comment**.
6. To apply changes click **Save** in the toolbar.

## How to avoid the manual evaluation

To make the test evaluated without your work:

- Check the [test settings](#) and make sure, the evaluation mode is set to Automatic option.
- [Remove any questions](#) that cannot be automatically evaluated.

## Create, edit & import content

### Content editing

Create and edit e-learning responsive content using Learnis visual editor.

You can create headings, paragraphs, tables, bullet lists, insert responsive images and video, apply inline formatting or styles.

If you are familiar with coding, you can switch to HTML markup mode.

### Editor configurations

Learnis visual editor has two configurations:

1. Full – configuration with all tools
2. Minimal – configuration with only necessary tools

### Keyboard shortcuts

To speed up your editing you can use keyboard shortcuts:

Action	Shortcut
Cut	Ctrl + X
Copy	Ctrl + C
Paste	Ctrl + V
Select content	Shift + click from, Shift + click to
Undo	Ctrl + Z
Redo	Ctrl + Y
Delete content	Delete, Backspace
Bold	Ctrl + B
Italic	Ctrl + I
Underline	Ctrl + U
Find/Replace	Ctrl + F

### Shortcuts on a Mac

Use Cmd key on Mac instead of Ctrl.

### Copy & paste

You can copy and paste selected texts, images, tables and other content.

To copy and paste content:

1. Select the content you want to copy.
2. Use keyboard shortcut **Ctrl + C** or button **Copy** in editor toolbar.

3. Click into the content to specify where you want to paste the content.
4. Use keyboard shortcut **Ctrl + V** or button **Paste** in editor toolbar.

## Copy text from other applications

You can copy text using **Ctrl + C** from a Word document, website or any other application and paste it into a text box when editing the text using **Ctrl + V**.

The pasted text is inserted including formatting like font, color, bold, italic and links.

## Copy & paste text from other applications without formatting

Tip: In order to avoid various formatting issues later when editing the content, it is recommended to paste the text without formatting and add formatting in the editor.

You can copy text using **Ctrl + C** from a Word document, website or any other application and paste it into a text box when editing the text using **Ctrl + Shift + V**.

## Copy & paste whole editor content

You can duplicate all the editor content at once – from one course to another, for example.

This will ensure that lesson content is duplicated without any changes and with correct markup.

To copy and paste everything in the editor:

1. Switch to source using **Edit HTML source** in the toolbar.
2. Select all the source using **Ctrl + A**.
3. Use keyboard shortcut **Ctrl + C** to copy the content.
4. Switch to editor where you want to paste.
5. Switch to source using **Edit HTML source** in the toolbar.
6. Use keyboard shortcut **Ctrl + V** to paste the content.

## Delete content

To delete texts, images, tables, videos and other content:

1. Select the content.
2. Press **Delete** or **Backspace** key.

## Undo & redo changes

You can undo or redo any changes made.

- To take back (Undo) any changes you've made use keyboard shortcut **Ctrl + Z** or click **Undo** in the toolbar.
- To redo any changes you've made use keyboard shortcut **Ctrl + Y** or click **Redo** in the toolbar.

Editor supports unlimited Undo and Redo steps.

When you leave the page and editor is closed, the undo and redo steps are cleared.

When you save the item and editor reloaded, the undo and redo steps are cleared but the history

revision was created.

## Editor history

Every time you save the course, lesson, article or page, a new revision of the editor content is created.

If you need to revert to older version, you can load it to the editor replacing current editor content.

To view and revert content revision:

1. Go to page with editor.
2. If you have any unsaved changes in the editor, click **Save**.
3. Click **Load revision icon** in top right corner of the editor.
4. Select the revision using checkbox.
5. Click **Load items** to load the revision to the editor.  
*Warning: Current content in the editor is replaced by a revision.*
6. To publish the restored revision, click **Save**.

## Text format & styles

Adding a proper formatting is important for both visual appearance and for correct markup, structuring and accessibility of your content.

Formatting & styling options:

- **Styles** – apply predefined styles across all your content.
- **Paragraph styles** – create headings, bullet and number lists.
- **Direct format** – apply bold, align, text color or other in-place formatting.

Learnis visual editor uses a Learner portal styles, to render the content preview accurate – as it will appear on the portal.

## Create paragraph

Paragraph is a default text format.

To insert a new paragraph:

1. **Place the cursor** where you want to insert the paragraph after.
2. Press **Enter** key.

## Create headings

You can create six sizes of headings.

To create a heading:

1. **Place the cursor** where you want to insert a heading.
2. Expand **Format dropdown** in toolbar and choose **Heading 1** to **Heading 6**.
3. **Type** your heading's text.

To reformat existing text to a heading:

1. **Place the cursor** anywhere into element you want to reformat – in the middle of the paragraph, for example.
2. Expand **Format dropdown** in toolbar and choose **Heading 1** to **Heading 6**.

## Create bullet or number lists

To create a bulleted or numbered list:

1. **Place the cursor** where you want to insert a bulleted list.
2. Click either:
  - **Insert/Remove Bulleted list** in the editor toolbar, or,
  - **Insert/Remove Numbered list** in the editor toolbar.
3. **Type** your text.
4. Use **Enter** key to create a new bullet.

To reformat existing text to a list:

1. **Place the cursor** anywhere into element you want to reformat – in the middle of the paragraph, for example.
2. Click either:
  - **Insert/Remove Bulleted list** in the editor toolbar, or,
  - **Insert/Remove Numbered list** in the editor toolbar.
3. Place the cursor and use **Enter** key to create a new bullet.

## Reset paragraph style to default

To remove headings, bullet or numbered lists or other paragraph styles and default to the paragraph:

1. Click anywhere into content you want to make a paragraph (example in the middle of the heading).
2. Expand **Format dropdown** in toolbar and choose **Paragraph**.

## Direct text formatting

While editing text, you can apply direct formatting like bold, align, or text color to any part of a text

To apply direct text formatting:

1. Select a text you want to format.
2. Click in a toolbar:
  - **Bold**
  - **Italic**
  - **Underline**
  - **Striketrough**
  - **Subscript**

- Superscript

## Change color of a text

You can change a text color or background color of the text:

1. Select a text.
2. Click **Select Text Color** or **Select Background Color** in editor toolbar.
3. Pick a color from a pallet.

## Change font

You can change a font family used:

1. Select a text.
2. Click **Font family** in editor toolbar.
3. Pick a font from a dropdown with available fonts.

## Change size of a text

You can change a font size of the text:

1. Select a text.
2. Click **Font size** in editor toolbar.
3. Pick a size from a dropdown.

## Change align option

You can change a font size of the text:

1. Select a text.
2. Click in a toolbar:
  1. Align Left
  2. Align Center
  3. Align Right
  4. Align Full (Justify)

## Edit direct CSS style

Editor allow you to apply any CSS-based style to any element.

To edit direct CSS style of an element:

1. Click on element you want to add a style to.
2. Click **Edit CSS styles** in the toolbar.
3. Set any CSS properties you need.
4. To preview a direct style, click **Apply**.

5. When done, click **Update**.

Tip: This styles are not reusable and cannot be managed. If you want to apply styles to multiple elements in various lessons across courses, consider using [styles](#).

## Remove direct formatting

To clear an inline text formatting like bold, italic, colors:

1. Select text you want to clear formatting from.
2. Click **Remove Formatting** in the toolbar.

## Add styles

Maintain a consistent visual appearance across all your lessons, courses, tests and other types of content using a predefined global CSS-based styles.

About styles:

- Styles are available to all content creators.
- Styles can used for various types of content – paragraphs, headings, images, videos, tables and more.
- By default, there are only a few styles to create [responsive image](#), [responsive video](#) and [responsive table](#).

*Note: To add or remove more editor styles, please contact your Learnis Administrator.*

To assign a style to an element:

1. Click on element you want to add a style to.
2. Click **Styles** menu and select a style.

## Remove styles

To remove assigned style:

1. Click on element you want to remove a style from.
2. Click **Styles** menu and click **Styles**.

## Insert images

You can insert images uploaded to Learnis, or link from a web.

Learnis supports responsive images, that automatically adapts to actual screen width.

Video: See how you can [create responsive content in Learnis](#) on our YouTube channel.

## Insert responsive images

We recommend to insert [images optimized for a web](#).

To insert a responsive image:

1. **Place the cursor** where you want to insert an image.  
*Tip: Inserting images to a new paragraph usually ease a content formatting.*

2. Click **Insert/Edit Image** in the toolbar.
3. Click **Browse** next to the Link URL and find the image.
4. If the file is not uploaded to the Learnis yet, click **New file** and upload it from your local device.
5. Select the image using checkbox and click **Load items**.
6. You can enter Image description or change another image settings.
7. To make image responsive, click the **Class** menu and choose: **responsiveImage-estyle** option.  
*Note: To create a fixed-size image skip this step.*
8. Click **Insert**.

## Make images responsive

To make existing fixed-size image responsive:

1. Click on the image to select it.
2. Click **Styles**.
3. Choose **responsiveImage** option.

## Make images fixed

To make existing responsive image fixed-sized:

1. Click on the image to select it.
2. Click **Styles**.
3. Click **Styles** option again.

## Insert or edit videos

You can insert videos from various sources:

- Hosted in Learnis – videos uploaded to your Learnis Server or Learnis Cloud.
- Hosted on the web – videos linked from other websites.
- Hosted on YouTube – videos embedded from YouTube.
- Hosted on Vimeo – videos embedded from Video.

Learnis supports responsive HTML5 videos, that automatically adapts to actual screen width.

Video: See how you can [create responsive content in Learnis](#) on our YouTube channel.

## Insert responsive videos

We recommend to insert [videos optimized for a web](#).

To insert a video hosted in Learnis or linked from a web and make it responsive:

1. **Place the cursor** where you want to insert a video.  
*Tip: Inserting videos to a new paragraph usually ease a content formatting.*

2. Click **Insert/Edit Embedded Media** in the toolbar.
3. Click **Type** menu and choose **HTML5 Video** option.
4. Click **Browse** next to the File/URL and find the video.
5. If the video is not uploaded to the Learnis yet, click **New file** and upload it from your local device.
6. Select the video using checkbox and click **Load items**.
7. You can click tab **Advanced**, and check option **Controls** under the HTML5 Video Options to enable video playback controls.
8. You can change another video settings.
9. Click **Insert**.
10. To make video responsive, select the video, click **Styles** and choose **responsiveVideo** option.

## Insert responsive YouTube & Vimeo videos

To embed a YouTube or Vimeo video and make it responsive:

1. **Place the cursor** where you want to insert a video.  
*Tip: Inserting videos to a new paragraph usually ease a content formatting.*
2. Click **Insert/Edit Embedded Media** in the toolbar.
3. Click **Type** menu and choose **Iframe** option.
4. Click tab **Source**.
5. Open a new browser tab and copy [embed code from YouTube](#) or [Vimeo](#) to the clipboard.
6. Switch back to Learnis and paste the code into **Source**.
7. You can change another video settings.
8. Click **Insert**.
9. To make video responsive, select the video, click **Styles** and choose **responsiveVideo** option.

## Make videos responsive

To make existing fixed-size video responsive:

1. Click on the video to select it.
2. Click **Styles**.
3. Choose **responsiveImage** option.

## Make videos fixed

To make existing responsive video fixed-sized:

1. Click on the video to select it.
2. Click **Styles**.

3. Click **Styles** option again.

## ***Insert or edit tables***

You can insert table to render a data or to create a layout.

Learnis supports responsive tables, that automatically adapts to actual screen width.

Video: See how you can [create responsive content in Learnis](#) on our YouTube channel.

## **Insert responsive table**

To insert a responsive table:

1. **Place the cursor** where you want to insert a table.  
*Tip: Inserting tables to a new paragraph usually ease a content formatting.*
2. Click **Insert/Edit Table** in the toolbar.
3. To make table responsive, click the **Class** menu and choose: **responsiveTable-estyle** option.  
*Note: To create a fixed table skip this step.*
4. You can change any other table settings.
5. Click **Insert**.

## **Make tables responsive**

To make existing fixed table responsive:

1. Click on the table to select it.
2. Click **Styles**.
3. Choose **responsiveTable** option.

## **Make tables fixed**

To make existing responsive table fixed:

1. Click on the table to select it.
2. Click **Styles**.
3. Click **Styles** option again.

## ***Insert, edit or remove links***

### **Insert links**

You can add a link to the text to open any web address or a document from Media library:

1. Select a text you want to be a link.
2. Click **Insert/Edit Link** in a toolbar.
3. If you have the web address, enter it to the **Link URL**.
4. If you want to link a document uploaded to Learnis, click **Browse** next to the Link URL, find the file, select it using checkbox and click **Load items**.

5. Recommended: To open a web address in a new tab, click on Target and choose **Open in new Window (\_blank)**.
6. You can enter **Title**.
7. Click **Insert**.

## Insert e-mail links

You can add an e-mail link to the text to open an e-mail client (if available):

1. Select a text you want to be a link.
2. Click **Insert/Edit Link** in a toolbar.
3. Enter e-mail address to the **Link URL**.
4. Click **Insert**.
5. Click **OK** in the confirmation dialog.

## Edit links

To edit a link:

1. Click on link you want to modify.
2. Click **Insert/Edit Link** in a toolbar.
3. Make your edits.
4. Click **Update**.

## Remove links

To remove a link:

1. Click on link you want to remove.
2. Click **Unlink** in the toolbar.

## *Special characters & content encoding*

### Insert special characters

To insert a special character:

1. Place cursor where you want a character to be inserted.
2. Click on **Insert Special Character** in the toolbar.
3. Click character you want to insert.

### Content encoding

Learnis works internally with [Unicode Standard \(UTF-8\)](#) encoding to ensure a great support of international content.

Top: For best results, you can use the same encoding for your content source files, if possible.

## **Import and track SCORM modules**

You can import SCORM 1.2 a 2004 module packages into the Learnis courses.

- A module will be inserted as a new lesson.
- SCORM player is responsive and support responsive SCORM content.

## **Import as a new course**

To import SCORM module as a new course:

1. Navigate to **Courses** page
2. Click **Import** in the toolbar
3. If the file is placed on your device, click **Choose file** to upload the file from your device
4. If the file is already uploaded in the Media Library, click **Choose from media library** and select the file there
5. Click **Import** in the toolbar to begin import
6. To confirm the import click **OK** in the dialog

A new course is created, named the same as file being imported.

New course contain one lessons with the SCORM content.

## **Import into existing course**

You can also import SCORM module as a new lesson into the existing course.

1. Navigate to **Courses** page
2. Find the course and click **Edit** in the data grid row
3. Navigate to **Course** page
4. Click **Import** in the toolbar
5. If the file is placed on your device, click **Choose file** to upload the file from your device
6. If the file is already uploaded in the Media Library, click **Choose from media library** and select the file there
7. Click **Import** in the toolbar to begin import
8. To confirm the import click **OK** in the dialog

A new lesson holding a SCORM content is created within the course, inserted after the last lesson.

You can import as many SCORM modules as you want.

SCORM lessons can be combined with a standard ones in any way you want.

## **Import PowerPoint and LibreOffice presentations**

You can import Microsoft PowerPoint and LibreOffice Presenter files into the Learnis courses.

- Each slide will be inserted as a responsive image into new lesson.
- New lessons are inserted after last lesson.

- Lessons are ordered the same way as slides in your presentation.

## Import as a new course

To import presentation as a new course:

1. Navigate to **Courses** page
2. Click **Import** in the toolbar
3. If the file is placed on your device, click **Choose file** to upload the file from your device
4. If the file is already uploaded in the Media Library, click **Choose from media library** and select the file there
5. Click **Import** in the toolbar to begin import
6. To confirm the import click **OK** in the dialog

A new course is created, named the same as file being imported.

## Import into existing course

You can also import presentation as a new lesson into the existing course.

1. Navigate to **Courses** page
2. Find the course and click **Edit** in the data grid row
3. Navigate to **Course** page
4. Click **Import** in the toolbar
5. If the file is placed on your device, click **Choose file** to upload the file from your device
6. If the file is already uploaded in the Media Library, click **Choose from media library** and select the file there
7. Click **Import** in the toolbar to begin import
8. To confirm the import click **OK** in the dialog

A new lesson is created within the course, inserted after the last lesson.

## Media uploads

### *Media Library basics*

Before you start uploading your files, you should understand a few things.

### Personal & shared folders

Learnis support two types of folders:

- **Personal folders** – Every admin get his own folder and has full permissions to it. Other administrators cannot view your personal folder, or edit your files or folders in it.
- **Shared folders** – This folder can be accessed and used by more administrators or whole team or organization. These folders are usually created and configured based on your specific needs.

*Note: To create a shared folder contact your Learnis Administrator.*

### Find your personal folder

To find you personal folder:

1. Click **Media Library** in the left menu.
2. If you are visiting the Media library for the first time, your personal folder will be displayed.
3. If you visited Media library and changed the folder, this folder is displayed. You need to either navigate back your personal folder, or you can **log out, sign in back** and go to media library – your personal folder will be displayed.

To make sure, you can see your name in breadcrumb navigation.

### Navigate folders

- To open folder – click on folder name
- Go one level up – click on arrow up, or use breadcrumb navigation

### View mode

You can switch between 3 view modes:

- Thumbnails – show large thumbnails
- Tiles – show medium thumbnails, more compact
- List – show details of files, small thumbnails

To switch a view mode, click button in the toolbar.

### *Uploading files*

You can upload files from a computer to Learnis in a few easy steps.

## Upload files

To upload many files at once:

1. From Admin dashboard, go to **Media Library**.
2. Navigate to folder you want to upload file to.
3. In the toolbar, click **New file**.
4. Click **Choose files**.
5. Find files and select them using keyboard shortcut **Ctrl + click**, or to select all files within a folder use shortcut **Ctrl + A**.
6. Click **Open**.
7. Click **Upload**.

## Upload file using basic uploader

Basic uploader allow you to upload a single file at once.

*Note: To upload many files at once, you must enable multi-file uploader (see below).*

To upload single file using basic uploader:

1. From Admin dashboard, go to **Media Library**.
2. Navigate to folder you want to upload file to.
3. In the toolbar, click **New file**.
4. Click **Choose File**.
5. Find a file and select it.
6. Click **Open**.
7. Click **Upload**.

## Troubleshooting

### ***Problem: File is not uploaded***

- Cause: Anything from file too large, invalid filename, or server availability problem.
- Solution 1: Make sure the file matches the maximum file size.
- Solution 2: Check file name and extension against current valid extensions. You can try to rename a file to web-safe name – lowercase, only numbers and letters, dashes or underscores (a-z, 0-9, -, \_), as sometimes spaces or special characters can cause problem. Also, if the Learnis is deployed to Linux server, the filenames are case sensitive.
- Solution 4: Verify Learnis application availability – can you access other parts of the application? If the application is not responding, please contact your Learnis Administrator.

### ***Problem: Message “The file you are trying to upload is too large.” or “No valid files selected, please try again.” displayed***

- Cause: File is too large.

- Solution 1: Optimize your assets file size.
- Solution 2: Ask Administrator to raise upload limits.

**Problem: Message “File already exists.”**

- Cause: File with the same name is already uploaded in the folder where you try to upload.
- Solution 1: Rename your file or upload to different folder.
- Solution 2: Delete the existing file, if it is not needed anymore.

**Upload limits & restrictions**

Default upload limits and restrictions:

- **Valid extensions:** gif, jpg, jpeg, png, htm, html, pdf, zip, rar, txt, csv, xml, isdoc, swf, flv, mov, avi, mpg, mpeg, asf, xls, doc, ppt, pps, odt, odp, ods, odg, odf, mp3, mp4, f4v, 3gp, wav, ogg, amr, pptx, ppsx, docx, xlsx, wmw, wm, eot, svg, ttf, woff, woff2, webm, ogv
- **Max upload size:** 200 MB

To check your current limits & restrictions:

1. From Admin dashboard, go to **Media Library**.
2. Navigate to folder you want to upload file to.
3. In the toolbar, click **New file**.

The restrictions are displayed in upload dialog.

**Raise upload limits or change valid extensions**

To raise limits or change any restrictions, please contact your Learnis Administrator.

**Enabling Learnis multi-file uploader**

Uploading many files at one require a Flash plugin to be installed and activated.

**Google Chrome**

Chrome comes built in with it's own version of Flash (you are not required to install separate plugin). All you need is to enable flash on specific web addresses (domains).

To Enable Flash for Google Chrome please follow the links:

1. Official Google documentation: [Use or fix Flash audio & video](#).
2. How to tutorial with screenshots: [Enabling Flash for Google Chrome \(Windows/Macintosh\)](#)

**Other browsers**

If you use different browser, follow your browser manufacturer's instructions.

**Manage uploads**

You can organize your files uploaded to Learnis using folders.

## Create a folder

To create a new folder:

1. From Admin dashboard, go to **Media Library**.
2. If there are some folders already, navigate to folder where you want to create your new folder.
3. Click **New folder** in the toolbar.
4. Enter folder name into **New folder** dialog.
5. Click **OK**.

## Rename a file or folder

To rename uploaded file or folder:

1. From Admin dashboard, go to **Media Library**.
2. Find a folder, hover the mouse and click **Rename icon** in the toolbar.
3. Enter name using **Folder** dialog.
4. Click **OK**.

## Move files or folders

If you move the file or folder:

- All the sub-folders and questions within the folder will be moved too.
- Important: If you move file, such as image, linked from the course, lesson, test or other editor content, the link will be broken.

To move file/s or folder/s around:

1. From Admin dashboard, go to **Media Library**.
2. Find a files/s or folder/s and select it using checkbox.
3. Click **Move** in the toolbar.
4. Select target folder in the **Move** dialog.
5. Click **OK**.

## Delete files or folders

If you delete the folder/s:

- No one can access the data anymore.
- Folder/s are deleted including all the sub-folders and files within the folder
- Important: Deletion cannot be undone!

To delete single file or folder:

1. From Admin dashboard, go to **Media Library**.
2. Find the file or folder and click **Delete icon** in the data grid row.

3. Confirm deletion click **OK** in the dialog.

To delete many files and folders at once:

1. Find a files and folders and select it using checkbox.
2. Click **Delete** in the toolbar.
3. Confirm deletion by clicking **OK** in the dialog

## Download a file

To download a file to your computer:

1. From Admin dashboard, go to **Media Library**.
2. Find the file and select it using checkbox.
3. Click **Download** in the toolbar.

## Troubleshooting

- Folder not created or renamed – check name of the folder to match allowed chars only: a-z, A-Z, 0-9, \_ , - and .
- Folder not created or moved – check permissions on folder you want to move and on target folder

## Image editor

You can do basic image editing using edit image actions right from the application:

- Crop
- Resize
- Flip
- Rotate

You can do multiple edits at once.

## Crop images

To crop an image:

1. From Admin dashboard, go to **Media Library**.
2. Find the image, hover the mouse and click **Edit icon**.
3. Click **Crop**.
4. Select the area to remain after crop.
5. Click **Apply**.
6. You can revert the action if you click **Revert** and then click **OK** in the confirmation prompt.
7. Click **Save**.
8. If you want to to overwrite the image, click **Save**.

*Important: If you overwrite image used in the course, lesson, test or other editor content, the image can be distorted.*

9. If you want to keep the original file and save the image as a new file, change the name and click **Save**.

## Resize images

To resize an image:

1. From Admin dashboard, go to **Media Library**.
2. Find the image, hover the mouse and click **Edit icon**.
3. Click **Crop**.
4. Resize the image using handlers or enter a numbers.
5. Click **Apply**.
6. You can revert the action if you click **Revert** and then click **OK** in the confirmation prompt.
7. Click **Save**.
8. If you want to to overwrite the image, click **Save**.  
*Important: If you overwrite image used in the course, lesson, test or other editor content, the image can be distorted.*
9. If you want to keep the original file and save the image as a new file, change the name and click **Save**.

## Flip images

To flip an image:

1. From Admin dashboard, go to **Media Library**.
2. Find the image, hover the mouse and click **Edit icon**.
3. Click **Flip**.
4. Click **Horizontal** or **Vertical**.
5. Click **Apply**.
6. You can revert the action if you click **Revert** and then click **OK** in the confirmation prompt.
7. Click **Save**.
8. If you want to to overwrite the image, click **Save**.  
*Important: If you overwrite image used in the course, lesson, test or other editor content, the image can be distorted.*
9. If you want to keep the original file and save the image as a new file, change the name and click **Save**.

## Rotate images

To rotate an image:

1. From Admin dashboard, go to **Media Library**.

2. Find the image, hover the mouse and click **Edit icon**.
3. Click **Rotate**.
4. Click **90°**, **180°** or **270°**.
5. Click **Apply**.
6. You can revert the action if you click **Revert** and then click **OK** in the confirmation prompt.
7. Click **Save**.
8. If you want to to overwrite the image, click **Save**.  
*Important: If you overwrite image used in the course, lesson, test or other editor content, the image can be distorted.*
9. If you want to keep the original file and save the image as a new file, change the name and click **Save**.

## Manage learners & user groups

### Add learners

You can add as many learners as you need, but count of active learners must match your license.

*Note: For details of your license contact your Learnis Administrator.*

To add a new user to Learnis:

1. Navigate to **Students** page.
2. Click **New student** in the toolbar.
3. Enter the **Surname**.
4. Enter the **User name** or click icon next to input to generate the user name from surname.
5. Enter the **Password** and **Re-type password** or click icon next to input to generate the password.  
*Note: You can save a password to give it to your learners, or you can give them just an username and ask them to [reset the password](#) instead. In this case make sure they have an email address present.*
6. Enter the **E-mail** if you want the student to receive e-mail messages from the LMS.
7. You can enter **Description** or any other learner data, set the default localization or add profile image.
8. Click **Save** in the toolbar to create the account.

Tip: To avoid creating accounts by your self, you can instruct you learners to self register using Sign up form (see Learner Manual, chapter Sign Up for Learner account), import learners from CSV or ask you administrator to setup as LDAP / Active Directory sync if this is an option for your organization.

### Import learners from CSV

If you need to create bigger amount of learner accounts, you can create a CSV file with a data and import the data into Learnis users database.

Tip: Download the [sample CSV file](#) and check file format specs below.

To import learners in bulk from your CSV file:

1. Navigate to **Students** page
2. Click **Import** in the toolbar
3. If the file is placed on your device, click **Choose file** to upload the file from your device
4. If the file is already uploaded in the Media Library, click **Choose from media library** and select the file there
5. Click **Import** in the toolbar to begin import
6. To confirm the import click **OK** in the dialog

The summary dialog about accounts creation is displayed. Please check the import status for any errors.

## CSV file format

- Encoding: UTF-8, LF
- Separator: ; (semicolon)
- Text delimiter: " (quotation marks)

## Sample format of the CSV

```
"name";"middlename";"surname";"email";"code";"password";"localization";"gender";  
"date_born";"city";"phone";"comment";"group"  
"John";"Marvin";"Doe";"info@netventic.com";"STUD001";"654321x";"en-  
US";"male";"1981-09-21";"Phoenix";"111 222 333";"Sample student";"Group US"  
"Alice";"";"Smith";"info@netventic.com";"STUD002";"654321y";"en-  
US";"female";"1979-12-01";"Dallas";"222 333 444";"Sample student";"Group US"  
"Jack";"";"Lee";"support@netventic.com";"STUD003";"654321z";"en-  
US";"male";"1985-05-17";"Singapore";"333 444 555";"Sample student";""
```

## Troubleshooting

Error/Warning "Insufficient data supplied."

- make sure the CSV format is kept while editing the data
- use text editor (notepad, pspad, vscode) to check the format of file you upload
- make sure your data do NOT contain delimiter character "

## Export learners to CSV

To export learners in bulk to CSV file:

1. Navigate to **Students** page.
2. Select rows you want to export using checkbox.
3. Click **Export** in the toolbar.
4. You can change mapping of exported data using **Advanced export settings**.
5. Click **Export** in the toolbar.
6. To confirm the data export click **OK** in the dialog.
7. You can review the **Export results log**.
8. To download the CSV file to your device click **Download** in the toolbar.

## Data that can be exported

- Status
- Name
- Surname
- E-mail
- Login (User name)
- Phone

## CSV file format

- Encoding: UTF-8, LF
- Separator: , (colon)
- Text delimiter: none

## Troubleshooting

If you have many rows to export (several thousands), select students in smaller ranges (up to 1000 rows) using filter.

## *Print learner profile or save as PDF*

To view a learner profile printable page:

1. Click **Students** in the left menu.
2. Find the student and use select it using checkbox
3. Click **Print preview** in the toolbar

Tip: You can also open print preview from the learner page while editing it.

## Print from Chrome – from a standard printer

To print from Chrome from a standard printer, follow a help article [Print from chrome](#) like this:

1. Click **File** → **Print**. Or, use a keyboard shortcut **Ctrl + P**.
2. In the window that appears, select **your printer** as destination.
3. Change any print settings you want.
4. When ready, click **Print**.

## Print from Chrome – save as PDF

To save certificate from Chrome as PDF, follow a help article [Print from chrome](#) like this:

5. Click **File** → **Print**. Or, use a keyboard shortcut **Ctrl + P**.
6. In the window that appears, select the **Save as PDF** as destination.
7. Change any print settings you want.
8. When ready, click **Save**.
9. Choose a folder where to save the certificate on your device.
10. Click **Save**.

If you use different browser, follow your browser manufacturer's instructions.

## *Deactivate a learner*

You can temporarily block a user's access to your organization's Learnis services by deactivating their account.

When you deactivate an account:

- Learnis Server instance or Learnis Cloud services are unavailable to the learner.
- Learner's course progress, test attempts, assignments, or other data aren't deleted.
- New invitations are blocked.
- Account is not counted against license restriction on active learners.
- Account can be activated anytime.

## Deactivate the learner

To deactivate the learner's account:

1. From Admin dashboard, go to **Students**.
2. Find the student and click **Edit** in the data grid row.
3. Click **Deactivate** in the toolbar.

At this point, the student can't log in to the LMS.

## Activate deactivated learner

After deactivating a learner, you can restore the account at any time:

1. From Admin dashboard, go to **Students**.
2. Find the student and click **Edit** in the data grid row
3. Click **Activate** in the toolbar

You can deactivate and restore any accounts any time and as often as you need.

## ***Edit or delete learners***

To edit or delete a learner account you must be either owner or has edit permission.

## **Edit a learner**

To edit the learner's account:

1. From Admin dashboard, go to **Students**.
2. Find the learner and click **Edit** in the data grid row.
3. Make your changes.
4. Click **Save**.

## **Delete a learner**

Important: Before deleting the course, please consider [deactivating the learner](#) instead.

When you delete an account:

- Learnis Server instance or Learnis Cloud services are unavailable to the learner.
- Learner's course progress, test attempts, assignments, or other are either deleted, or anonymized (record has no learner information remaining);  
*Note: Delete operation comply with The General Data Protection Regulation (GDPR)*

*“Right to erasure” requirements.*

- Deleted account is not counted against license restriction anymore.
- Important: Learner deletion can't be undone.  
*Note: Only way to get learner back to the Learnis, is to re-create his account as a new, blank account.*

To delete single learner account:

1. From Admin dashboard, go to **Students**.
2. Find the learner and click **Delete** in the data grid row.
3. To confirm deletion click **OK** in the dialog.

Tip: You can also delete the learner from the Learner page.

## Delete many learners at once

Before you begin, check what happens when you delete an account above.

To delete many learner accounts at once:

1. From Admin dashboard, go to **Students**.
2. Find all the learners you want to delete and select them using checkbox.
3. Click **Delete** in the toolbar.
4. To confirm deletion click **OK** in the dialog.

## Create user groups

To create a user group:

1. From Admin dashboard, go to **Groups**.
2. Click **New group** in the toolbar.
3. Enter the **Name** of the group.
4. Click **Save** in the toolbar to create the group.

## Add users to a group

To add learners or administrators into the group:

1. From Admin dashboard, go to **Groups**.
2. To add users into the group click **Add users**.
3. To add learners, click **Students** tab, or, to add admins click **Administrators** tab.
4. Find users in the list and **select them** using checkbox.
5. Click **Load items** in the toolbar.
6. Click **Save**.

## Deactivate a group

You can deactivate the existing group to disable permissions granted to that group.

When you deactivate a user group:

- Any permissions granted to the group are disabled – permissions behave like the group doesn't exist at all, or, like you remove the permissions completely (from all courses, tests, etc....).
- Nothing else changes:
  - The users within the group can access the LMS as before.
  - Any permission set to individual users works as before.
  - None of a group data are altered in any way.

## Deactivate the group

To deactivate the user group:

1. From Admin dashboard, go to **Groups**.
2. Find the group and click **Edit** in the data grid row.
3. Click **Deactivate** in the toolbar.

## Activate deactivated group

After deactivating a group, you can activate the group at any time:

1. From Admin dashboard, go to **Students**.
2. Find the deactivated group and click **Edit** in the data grid row
3. Click **Activate** in the toolbar

You can deactivate and activate any groups any time and as often as you need.

## Make a group active only for a period of time

You can set a time validity restriction to a user group.

When group is invalid (the time period is not matched):

- The result is the same as when you deactivate the group (see above)

To set the group validity:

1. Navigate to **Groups** page.
2. Find the group and click **Edit** in the data grid row.
3. Enter **Valid from** date to restrict group validity from to begin at certain date.
4. Enter **Valid to** date to restrict group validity to end at certain date.
5. Click **Save**.

Tip: To remove the time validity restriction, delete the validity dates and save the group.

## *Edit or delete groups*

To edit or delete a user group you must be either owner or has edit permission.

## Edit a group

To edit the user group:

1. From Admin dashboard, go to **Groups**.
2. Find the group and click **Edit** in the data grid row.
3. Make your changes.
4. Click **Save**.

## Delete a group

When you delete a group:

- No users are deleted.
- Any permissions given to that group are no longer valid.
- Important: Group deletion can't be undone.

To delete single user group:

1. From Admin dashboard, go to **Groups**.
2. Find the group and click **Delete** in the data grid row.
3. To confirm deletion click **OK** in the dialog.

Tip: You can also delete the group from the Group page.

## Delete many groups at once

To delete many user groups at once:

1. From Admin dashboard, go to **Groups**.
2. Find all the groups you want to delete and select them using checkbox.
3. Click **Delete** in the toolbar.
4. To confirm deletion click **OK** in the dialog.

## Communicate with your learners

### Create a forum

To create a discussion forum:

1. From Admin dashboard, go to **Forums**.
2. Click **New forum** in the toolbar.
3. Enter the **Title** of the forum.
4. You can enter the forum **Description** to provide additional info to the learners.
5. You can change or your **E-mail** or clear the address.  
*Note: E-mail address is displayed to the learners on a forum page so they can contact you.*
6. Click **Save** in the toolbar to create the forum.

### Pin forum to the top

To set forum to be pinned to the top:

1. From Dashboard, go to **Forums**.
2. Find the forum and click **Edit**.
3. Check the **Stick to top** option.
4. Click **Save** in the toolbar to apply changes.

Note: If there are multiple pinned forums, the forums are ordered by last reply, newer on top.

### Publish forum to your learners

A forum can be publish on its own, or as a part of the course.

### Publish a standalone forum

Manage who can view your forum and post to it:

1. From Admin dashboard, go to **Forums**.
2. Find the forum in listing and select it using checkbox.
3. Click **Permissions** in the toolbar.
4. To add user groups, click **Load items** under the **User groups** section.
5. To add learners, click **Load items** under the **Users** section.
6. Use checkbox to select one or more groups or learners and then click **Load items**.
7. You can add both groups and individual learners at the same time.
8. Click **Save and close** in the toolbar.

Tip: You can also access Permissions settings from the Forum page.

## Publish forum with a course

If the forum is [attached to the course](#), it will be published together with the course.

In this case, you don't have to manage the forum's permissions at all – permissions of the forum are inherited from the course permissions.

## Post to your forum via admin panel

Anybody, including Trainers, can post to forum via Learner portal, which is a recommended way.

Alternatively, you can post via admin panel:

1. From Dashboard, go to **Forum**.
2. Find the forum and click **Enter**.
3. Click **New reply**.
4. Enter your post to the **Content**.
5. Click **Save** in the toolbar to post to forum.

## Moderate & review posts

### Hold all posts for approval

If you want to hold the new posts to the forum for review:

1. From Dashboard, go to **Forums**.
2. Find the forum and click **Edit**.
3. Check the **Moderated** option.
4. Click **Save** in the toolbar to apply changes.

From now on, new posts to your forum are not displayed immediately in the forum to other users, until you, review and approve the posts.

### Review and approve posts

You can approve or deny posts before they appear to the learners.

To review and approve posts held for review:

1. From Dashboard, go to **Forums**.
2. If there are any posts to review, the warning sign is displayed in the **Replies** column.
3. Click **Enter**.
4. Find the posts to approve.
5. To approve the post click **Authorize**.

If you don't want to approve the post, you should delete the post.

To cancel approval click **Cancel authorization**.

## Delete the post

To delete single post:

1. From Dashboard, go to **Forums**.
2. Find the forum and click **Edit**.
3. Find the post and click **Delete**.

## Lock forum to block new posts

If you want to block new posts to the forum:

1. From Dashboard, go to **Forums**.
2. Find the forum and click **Edit**.
3. Check the **Moderated** option.
4. Click **Save** in the toolbar to apply changes.

At this point, the forum is still visible to the permitted learners, but no one can post to it.

## Deactivate a forum

You can disable access to all users to your forum and make it hidden.

When you deactivate a forum:

- Nobody but owner of the forum can view it or post to it.
- The forum including it's settings and content are not altered in any way.
- You can activate the forum any time.

## Deactivate the forum

To deactivate the forum:

1. From Admin dashboard, go to **Forum**.
2. Find the forum and click **Edit**.
3. Click **Deactivate** in the toolbar.

After deactivating a forum, you can activate the forum any time – click **Activate** in the toolbar.

You can deactivate and activate the forums as often as you need.

## Edit or delete forums

To edit or delete a forums you must be either owner or has edit permission.

## Edit a forum

To edit the forum:

1. From Admin dashboard, go to **Forum**.
2. Find the forum and click **Edit**.

3. Make your changes.
4. Click **Save**.

## Delete a forum

Tip: Before deleting the forum, please consider to [deactivate the forum](#) instead.

When you delete the test:

- No one can access the forum anymore.
- Important: Forum deletion can't be undone.

To delete single forum:

1. From Admin dashboard, go to **Forum**.
2. Find the forum and click **Delete**.
3. To confirm deletion click **OK** in the dialog.

Tip: You can also delete the forum from the Forum page.

## Delete many forums at once

To delete many forums at once:

1. From Admin dashboard, go to **Forum**.
2. Find all the forums you want to delete and select them using checkbox.
3. Click **Delete** in the toolbar.
4. To confirm deletion click **OK** in the dialog.

## Email your learners

You can email a single learner or administrator, a group of users, an entire database, or even people without Learnis account.

*Note: This feature require activation and additional configuration.*

However there is no limit on how many recipients you can mail to at once, we recommend to keep the count reasonable.

To create and send the e-mail message:

1. From Admin dashboard, go to **E-mailing**.
2. Click **New message** in the toolbar.
3. Enter the **Subject** of the message.
4. You can change **Sender name**.  
*Note: Sender name is in email client displayed as "From".*
5. Write your message into the **Content** input using rich text editor
6. Click **Recipients** tab.
7. To add people with Learnis account: click **Students**, **Administrators** or **Groups**, find and select users by checkbox and click **Load items**.

*Note: Duplicate users, users with invalid e-mail addresses or users without addresses are remove from recipients list.*

8. To add people by e-mail address click **E-mail**, enter e-mail addresses (separated by semicolon) and click **OK**.
9. To remove people from recipients click **Remove**.
10. Click **Save** in the toolbar to create the message
11. Click **Run** in the toolbar to start sending.

Tip: You can check the mailing progress status on e-mailing page or the message detail on **Recipients** tab.

## Stop the mailing in progress

You can stop sending a messages:

1. From Admin dashboard, go to **E-mailing**.
2. Find the message and click **Edit**.
3. Click **Stop** in the toolbar.

Status of the message is changed to the “Stopped”.

## Troubleshooting

See [E-mailing troubleshooting](#).

## Edit or delete e-mail messages

To edit or delete e-mail messages, you must be either owner or has edit permission.

## Edit a message before it's sent

*Note: Editing a message is disabled during sending out.*

To edit the message:

1. From Admin dashboard, go to **E-mailing**.
2. Find the message and click **Edit**.
3. Make your changes.
4. Click **Save** in the toolbar.

## Delete a message

Important: Message deletion can't be undone.

To delete single message:

1. From Admin dashboard, go to **E-mailing**.
2. Find the message and click **Delete**.
3. To confirm deletion click **OK** in the dialog.

Tip: You can also delete the message from the Message page.

## Delete many messages at once

To delete many messages at once:

1. From Admin dashboard, go to **E-mailing**.
2. Find all the messages you want to delete and select them using checkbox.
3. Click **Delete** in the toolbar.
4. To confirm deletion click **OK** in the dialog.

## *E-mailing troubleshooting*

### **Problem: Some people are not receiving the e-mails**

- Cause: Anything from SMTP server configuration to messages going to SPAM.
- Solutions:
  - Wait until the mailing is send out completely. Sending out many e-mails (hundreds or even thousands) can take up to couple of hours, depending on Learnis / SMTP server configuration.
  - Ask your learners to check their SPAM folders. If the e-mails from Learnis are going to SPAM, ask administrators of you e-mailing/SMTP server to take action.
  - Check the status of messages in the Learnis. If the status is “Error” or “Stopped”, contact your Learnis administrator.

### **Problem: No messages are send and emailing show status "Stopped"**

- Cause: Mass mailing is not configured properly, or the SMT server is not responding.
- Solution: Contact administrator to check SMTP server & mass mailing configuration and SMTP server status.

### **Problem: Subject is cropped in the email client**

- Cause: Subject is too long and can cause problems with the display (corruption or cutting) in some e-mail clients
- Solution: Before sending out a campaign, we recommend sending out a test round.

### **Problem: Message content is displayed improperly in email client**

- Cause: incompatibility of some e-mail clients.
- Solution: Simplify or remove problematic parts of the message content using WYSIWYG editor.
- Other solution: Depending on your need, you can also ask administrator to switch e-mail format from HTML to plain text.

### **Problem: Users not added to recipients list**

- Cause: Duplicate users, users with invalid e-mail addresses or users without addresses are

removed from recipients list.

- Solution: Check users for missing or invalid e-mail addresses.

## Manage certifications

### ***Certificates of completion***

By default, the certificates of course completion are not issued.

You can:

- Issue, update or delete the certificates manually, any time.
- Enable automatic issuing of the certificates for your course.

### ***Issue & remove certificates manually***

You can issue the certificate of completion to your learners manually.

### **Issue certificates**

To manually issue certificates to your enrolled learners:

1. Navigate to **Courses** page
2. Find the course and use select it using checkbox
3. Click **Certification** in the toolbar
4. Select learner/s using checkbox in the **Certification** dialog
5. Click **Generate certificate** in the toolbar

Note: Certificates are issued according to [course settings](#).

To view the issued certificate click **Show** in the user list in the **Certification** dialog.

### **Remove certificates**

To manually remove certificates:

1. Navigate to **Courses** page
2. Find the course and use select it using checkbox
3. Click **Certification** in the toolbar
4. Select learner/s using checkbox in the **Certification** dialog
5. Click **Remove certificate** in the toolbar
6. To confirm certificate removal click **OK** in the dialog

Tip: You can also edit or delete certificates via Certificates page.

### ***Enable automatic issuing of the certificates***

You can change mode of issuing of the certificates, so when the learner complete your course, Learnis issue the certificate for the learner on your behalf.

To enable automatic certification mode:

1. Navigate to **Courses** page.
2. Find the course and click **Edit** in the data grid row.
3. Make sure the course is being selected in the lessons panel (not lesson).
4. Click **Properties** in the toolbar.
5. Click tab **General**.
6. Change **Certification mode** to **Automatic**.
7. You can change the owner of the issued certificates using **Certificate owner** lookup – by default, the owner is you.
8. You can change the design of the issued certificates by choosing a different template using **Certificate template**.
9. Click **Save and close** to apply changes.

### **Setup e-mail notification on certificate expiration**

You can enable a reminder to mail a notification when an issued certificate is about to expire.

You can also control who should receive the e-mail.

To enable the basic e-mail reminder:

1. Navigate to **Certificate templates** page (under Certificates)
2. Find the certificate template and click **Edit** in the data grid row
3. Click **Set reminder** icon bell aside Validity input
4. Click **New row**
5. Set reminder parameters using dropdowns in **Remind** column (example: 4 weeks before)
6. Click **Load items** in **Message template** column
7. Select e-mail message template named "Expiration of certificate - %%certificate\_name%%" using checkbox
8. Click **Load items**
9. To set up multiple reminders click **New row** and repeat steps above
10. Click **Save and close** in the toolbar to create the reminder

*Note: If you need to use different message template, contact your Learnis Administrator to create a new one.*

### **Change who should receive the notifications**

By default, the notification is sent to:

- certified learner
- certificate owner

You can add more users by modifying the email template.

Please mind: The template can be used by other Trainers too. This means that listed recipients will receive notifications from the courses of other Trainers.

If this is unwanted, contact your Learnis Administrator to create a new e-mailing template just for you and use it at your courses.

## ***Manage certificates***

### **Modify issued certificate**

To change issued certificate:

1. Navigate to **Certificates** page.
2. Find the issued certificate and click **Edit** in the data grid row.
3. Change the **Content** of the certificate.
4. To change **Layout image** click lookup icon and navigate to image.
5. Click **Save** in the toolbar to apply changes.

### **View issued certificate**

To view the certificate from the admin panel:

#### ***Option 1***

1. Navigate to **Certificates** page.
2. Find the issued certificate and select it using checkbox.
3. Click **Preview** in the toolbar.

#### ***Option 2***

1. Navigate to **Certificates** page.
2. Find the issued certificate and click **Edit** in the toolbar.
3. Click **Preview** in the toolbar.

### **Delete issued certificate**

#### ***Option 1***

1. Navigate to **Certificates** page.
2. Find the issued certificate and click **Delete** in the data grid row.
3. To confirm deletion click **OK** in the dialog.

#### ***Option 2***

1. Navigate to **Certificates** page.
2. Find the issued certificate/s and select them using checkbox/es.
3. Click **Delete** in the toolbar.
4. To confirm deletion click **OK** in the dialog.

### Option 3

1. Navigate to **Certificates** page.
2. Find the issued certificate and click **Edit** in the data grid row.
3. Click **Delete** in the toolbar.
4. To confirm deletion click **OK** in the dialog.

## Manage certificate templates

### Create new certificate template

1. Navigate to **Certificates** page.
2. Click **New item** in the toolbar.
3. Enter the **Name** of the template.
4. Click **Layout image** lookup icon and pick an image from media library folder that should be used as background image.
5. Create the **Content** of certificate using editor.
6. You can use these dynamic keys:
  - %%\_CERT\_NAME\_%%
  - %%\_CERT\_USER\_%%
  - %%\_CERT\_USER\_CODE\_%%
  - %%\_CERT\_DATE\_%%
  - %%\_CERT\_LOGO\_%%
7. You can set validity of the certificate in months using input **Validity** (enter the whole number) and set the reminder on certificate expiration.
8. Click **Save** in the toolbar to create the template.

To use the template, navigate to your course and set it using [course settings](#).

## Share certificate template with other Trainers

### Option 1

1. Navigate to **Certificate templates** page (under Certificates).
2. Find and select the certificate templates using checkbox.
3. Click **Permissions** in the toolbar.
4. Give access to user group/s and/or individual Learners using **Permissions** dialog.
5. Click **Save and close** in the toolbar.

### Option 2

1. Navigate to **Certificate templates** page (under Certificates).

2. Find the certificate templates and click **Edit** in the data grid row.
3. Click **Permissions** in the toolbar.
4. Give access to user group/s and/or individual Learners using **Permissions** dialog.
5. Click **Save and close** in the toolbar.

## Measure results & report

### *Dashboards*

See your most important reports.

### Go to your Dashboards

To access your Dashboards:

1. **Sign In** to your Learnis Admin.
2. Click **Dashboards** in left menu.

### Switching dashboards

Learnis comes with two default dashboards.

To switch between dashboard:

1. **Sign In** to your Learnis Admin.
2. Click **Dashboards** in left menu.
3. Click **Dashboards** dropdown top right.
4. Choose a dashboard by name.

Note: When you switch dashboards, the last dashboard you visited is displayed when you come back, until you log out.

### Dashboard widgets

Dashboards are a collection of widgets. A widget is a mini-report that can display your data in a number of presentation styles, including simple numeric metrics, tables and charts.

Available widgets:

- Chart – choose component, view and existing chart to visualize your data
- Grid – choose component and view to render tabular data
- iFrame – you can load any external app/page to your dashboard
- Calendar – display a mini-calendar showing activities
- XML – display any RSS 2.0 feed
- System gadgets
  - Note – display a note
  - Exchange rates – display exchange rate
  - Picture – display a picture
  - Essential tools – display a links to important Learnis section (tailored to each user role)

## Create and customize dashboards

Dashboards contain one or more widgets (up to 6 per dashboard).

To create a new dashboard:

1. **Sign In** to your Learnis Admin.
2. Click **Dashboards** in left menu.
3. Click **New dashboard** in the toolbar.
4. Choose a layout of your dashboard.  
*Note: Each slot can take one widget.*
5. Enter **Dashboards – name**.
6. You can make this dashboard default by checking **Set as default** option.

To add widgets to your dashboard:

1. Click **Load items icon** in any slot you want.
2. Click **Gadget type** and choose an option.
3. Follow the wizard to configure a gadget.
4. When done, click **Save and close**.
5. Click **Save** in the toolbar to apply a new dashboard configuration.  
*Repeat steps 1– 5 to add the other widgets too.*
6. Click **Dashboards** in left menu to return to your dashboard.

## Search in Learnis admin

*This page is for trainers.*

You can search to find your students, courses, tests, questions, test results and media in Learnis.

How to search:

1. Click **Search** in the top right.
2. Enter search phrase using the **Global data search** dialog.
3. You can use **Advanced search** to narrow down the type of data to be included in search or activate case sensitive mode.
4. Click **Search**.

Search results are grouped by its type.

Note: Search results contain only items you have permissions to view.

## Run pre-built reports

Find and run pre-built Learnis learning progress reports.

## Find and run single-course report

1. Navigate to **Courses** page.
2. Find your course and click **View report**.

3. From **Report template** dropdown choose a report type:
  - **Subscribed users** – report include only enrolled learners.
  - **All users** – report include data of the all users.
  - **All users, segmented** – report include data of the all users and show them segmented.

## Find and run multi-course report

1. Navigate to default **Dashboard** page.
2. Click link **Courses progress report** in Reporting section.
3. From **Report template** dropdown choose a report type:
  - **Subscribed users** – report include only enrolled learners.
  - **All users** – report include data of the all users.
  - **All users, segmented** – report include data of the all users and show them segmented.

Note: Report show data across all courses, where you have view permissions.

## View overall course progress report

1. Navigate to **Courses** page
2. Find the course
3. Check the progress bar status in the **Progress** column

The value in percent is an average progress calculated from all subscribed learners.

## Find and run single test report

1. Navigate to **Tests** page
2. Find your test and click button **View report**
3. From **Report template** dropdown choose a report type:
  - **Test results – Total period** – run test results report using all historical data
  - **Test results – Last month** – run test results report for limited time period
  - **Test results – Last 30 days** – run test results report for limited time period
  - **Survey – Table** – show survey report in table style
  - **Survey – Pie chart** – show survey report in pie chart style
  - **Survey – Line chart** – show survey report in line chart style
  - **Survey – Vertical column chart** – show survey report in vertical column chart style
  - **Survey – Column chart** – show survey report in column chart style

## Find and run multi-test report

1. Navigate to default **Dashboard** page
2. Click link **Test results report** in Reporting section

3. From **Report template** dropdown choose a report type:
  1. **Test results – Total period** – run test results report using all historical data
  2. **Test results – Last month** – run test results report for limited time period
  3. **Test results – Last 30 days** – run test results report for limited time period

Note: Report show data from all tests, where you have read permissions.

## Customize views and charts

The best way to spot opportunities for your training is to regularly review your performance data. With dynamic tables and charts, you can examine account-wide trends, or find the answers to specific questions about how learners are interacting with your content and how they are progressing towards your goals.

In this article, you'll learn how to customize your views and charts to review the data that matters most to your business and to manage your training with greater ease, speed, and clarity.

## About views

A view is a table with data. Rows represent an item like test, course or student, while columns represents an item properties, like score, surname or date.

Learnis supports two types of views:

- **System views** – pre-built views which cannot be customized by you  
*Note: If you need to customize the system views, contact your Learnis Administrator.*
- **Custom views** – you can customize filter, table columns and charts and save the settings as a view

## Change row count

You can change how many rows should be displayed in the data table.

To set a row count:

1. Navigate to any page with data table available to you.
2. Click **Appearance** in the toolbar to open dialog.  
*Note: If the button is not available in the toolbar, or it's disabled, this feature is not available.*
3. Click **Items per page** dropdown and choose an option: 10, 15, 25 or 50.
4. Click **OK**.

Note: If there are folders the row count do not apply. To disable the folders click **Turn off**, if available.

## Disable paging

You can display all rows in the data table on one page.

Warning: Disabling paging in a component with many rows (5000+) can cause the application or browser to be slow or non-rendering.

To disable the paging:

1. Navigate to any page with data table available to you.
2. Click **Paging off** in the data table footer.  
*Note: If the button is not available, or it's disabled, the folders must be disabled or this feature is not available.*

To enable paging click **Paging on** in the data table footer.

## View or hide a charts

You can enable panel with dynamic charts to visualize the data form the current view.

To enable the dynamic charts:

1. Navigate to any page with data table available to you.
2. Click **Appearance** in the toolbar to open dialog.  
*Note: If the button is not available in the toolbar, or it's disabled, this feature is not available.*
3. If you want the charts to display below the data table:
  - Click **Horizontal panel** dropdown.
  - Choose an option: **Dynamic charts**.
4. If you want the charts to display next the data table (on right side):
  - Click **Vertical panel** dropdown.
  - Choose an option: **Dynamic charts**.
5. Click **OK**.

## View or hide item preview

You can enable panel with item view to see the item details right from the data table.

To enable the item view:

1. Navigate to any page with data table available to you.
2. Click **Appearance** in the toolbar to open dialog.  
*Note: If the button is not available in the toolbar, or it's disabled, this feature is not available.*
3. If you want the item view to display below the data table:
  - Click **Horizontal panel** dropdown.
  - Choose an option: **Item view**.
4. If you want the item view to display next the data table (on right side):
  - Click **Vertical panel** dropdown.
  - Choose an option: **Item view**.
5. Click **OK**.

## Filter your data

You can use the filter to:

- search a data you need using “fulltext” phrase
- filter only relevant data using exact filter conditions

## Add or edit filter

You can filter by any value in the available columns, even if the column is currently hidden from view.

Value in filter conditions matches **exact values only**, including the case:

*For example: Filtering by “abc”:*

- matches “abc”
- but doesn't match “Abc”, “abcdef” and “Abcdef”

To add or edit filter:

1. Click **Filter** in the toolbar.  
*Note: If the button is not available in the toolbar, or it's disabled, this feature is not available.*
2. Click dropdown **Choose** and select column and set other condition/s.
3. To combine multiple filter conditions click **New row** and **New group**.
4. You can change logical operator (AND, OR) using dropdown to create any query you want.
5. To filter the data click **Apply filter and close** in the toolbar.

## Search your data using filter

You can search any phrase or value available in any searchable columns, even if the column is currently hidden from view.

Value in search condition matches **exact and similar values**:

*For example: Searching for “abc”:*

- matches “abc”, “Abc”, “abcdef” and “Abcdef”

Search phrase is added as a filter condition “Contains”

*Note: Some columns might be non-searchable. For details contact your Learnis Administrator.*

To search a data:

1. Navigate to any page with search and filter support available to you.  
*See Pages with search and filter support below.*
2. To search items enter keyword into input **Contains...**  
*Note: If the input is not available in the toolbar, or it's disabled, this feature is not available.*
3. Click **OK**.

## Filter by surname initial letter

*Note: This feature is available on Students page only.*

To filter students by initial letter of their surname:

1. From Admin dashboard, go to **Students**.
2. Click a letter in the letter bar in the bottom of the screen.

## View filter conditions

If the filter is active, it is visually highlighted using yellow color.

To view current filter conditions:

- Click **Filter** next to View dropdown.

Expanded filter show all filter conditions and operators.

You can also access buttons to clear and edit filter.

## Clear a filter

To reset the whole filter:

1. Expand the filter.
2. Click **Clear filter**.

To remove the filter conditions individually:

1. Expand the filter.
2. Click **Remove icon** next to the condition you want to remove.

## Filter limitations

- Data from different columns are cannot be searched within one condition.  
*For example: if there are columns Name and Surname, you cannot search “name surname”, but create a query “name” AND “surname” composed from two conditions.*
- If there are folders on a page, filter always apply only to current folder – to filter across all tests disable the folders using link **Turn off**, if available.

## Pages with search and filter support

- Courses
- Course categories
- Tests
- Questions
- Students
- Groups
- Test results
- Assignments
- Certificates
- Certificate templates
- E-mailing
- Message templates
- Administrators (Admins only)

## Customize columns

You can:

- add or remove columns in your view,
- customize the order of the columns,
- and set the column to sort your data ascending or descending.

## Add, remove or reorder columns

To manage columns visibility and order:

1. Navigate to any page with custom columns support available to you.  
*See Pages with search and filter support below.*
2. Click **Columns** in the toolbar to open dialog.  
*Note: If the button is not available in the toolbar, or it's disabled, this feature is not available.*
3. To add one or more columns:
  - Click **New row**.
  - Choose column/s in **Add** columns list.  
*Tip: You can select multiple columns using Ctrl + click, range of columns using Shift + click or all columns using Ctrl + A.*
  - Click **OK**.
4. To remove column, click **Remove icon**.
5. You can reorder column by dragging **Move icon** up (=left), or down (=right).
6. You can change alignment of the text in the column using **Align** option.
7. You can preview the settings when you click **Apply settings**.
8. To apply changes and close the dialog, click **Apply settings and close**.

To reset custom columns use **View** dropdown and choose default system view.

## Sort your data

Current column used to sort, is visually highlighted using light blue color and arrow up or down next to column name.

To sort your data by specified column:

1. Click a **column name** you want to sort by.
2. To change sort order ascending or descending, click column name again.

Tip: To sort data grid with folders, it has to be disabled first using link **Turn off** and then click on column title you want to sort by.

## Pages with custom columns support

- Courses
- Course categories

- Tests
- Questions
- Students
- Groups
- Test results
- Assignments
- Certificates
- Certificate templates
- E-mailing
- Message templates
- Administrators

## ***Manage custom views***

You can save your view, name it and then switch between multiple views.

What is saved with the custom view:

- All filter conditions
- Column visibility and order
- Sort condition

What is not saved with the view:

- Paging conditions
- Horizontal and vertical panel visibility

## **Create and save custom views**

If you save a view, it will store a current view settings and you can later load it quickly.

To create a custom view:

1. Navigate to any page with custom views support available to you.  
*See Pages with custom views support below.*
2. Set filter conditions, columns visibility and order and sort condition settings.
3. When ready, click **Save view**.  
*Note: If the button is not available in the toolbar, or it's disabled, this feature is not available.*
4. Enter the **View name**.
5. To make your view a default view, check **Set as default** option.  
*Note: Default view is loaded first when you visit a page.*
6. Click **OK**.

## Switch data views

If you have, more than one view available, you can switch between them.

To switch views:

1. Navigate to any page with custom views support available to you.  
*See Pages with custom views support below.*
2. Click **View** dropdown.
3. Choose any system or custom view.

## Update your saved views

To update your custom view:

1. Navigate to any page with custom views support available to you.  
*See Pages with custom views support below.*
2. Click **View** dropdown and choose a view.  
*Note: You can update only your custom views, not system ones.*
3. Change filter conditions, columns visibility and order and sort condition settings.
4. When ready, click **Save view** in the toolbar.  
*Note: If the button is not available in the toolbar, or it's disabled, this feature is not available.*
5. From **View** dropdown, choose a view you want to update.  
*Important: This view will be overwritten.*
6. Click **OK**.  
*Important: This action cannot be undone.*

## Delete your views

To delete your custom view:

1. Navigate to any page with custom views support available to you.  
*See Pages with custom views support below.*
2. Click **Delete view** in the toolbar.
3. From **View** dropdown, choose the view you want to delete.
4. Click **OK**.
5. Click **OK** in the dialog to confirm the deletion.

## Export data to spreadsheet

You can export your data from Learnis to CSV file and then import the data into your spreadsheet software like Microsoft Excel, LibreOffice Calc, or any other and create basically any advanced custom reports.

The main advantage of this approach, apart total freedom to create any report you need, is an option to combine data from multiple tables into one report.

To export your data in bulk to CSV file:

1. Navigate to any page with data table available to you.

2. Select rows you want to export using checkbox.
3. Click **Export** in the toolbar.
4. You can change mapping of exported data using **Advanced export settings**.
5. Click **Export** in the toolbar.
6. To confirm the data export click **OK** in the dialog.
7. You can review the **Export results log**.
8. To download the CSV file to your device click **Download** in the toolbar.

## Import the CSV file into your spreadsheet software

Use import dialog in your spreadsheet software and set the import properties according to CSV file format:

- Encoding: UTF-8, LF
- Separator: , (colon)
- Text delimiter: none

For more details follow your spreadsheet software manufacturer's instructions.

## Troubleshooting

If you have many rows to export (several thousands), select data in smaller ranges (up to 1000 rows) using the filter.

