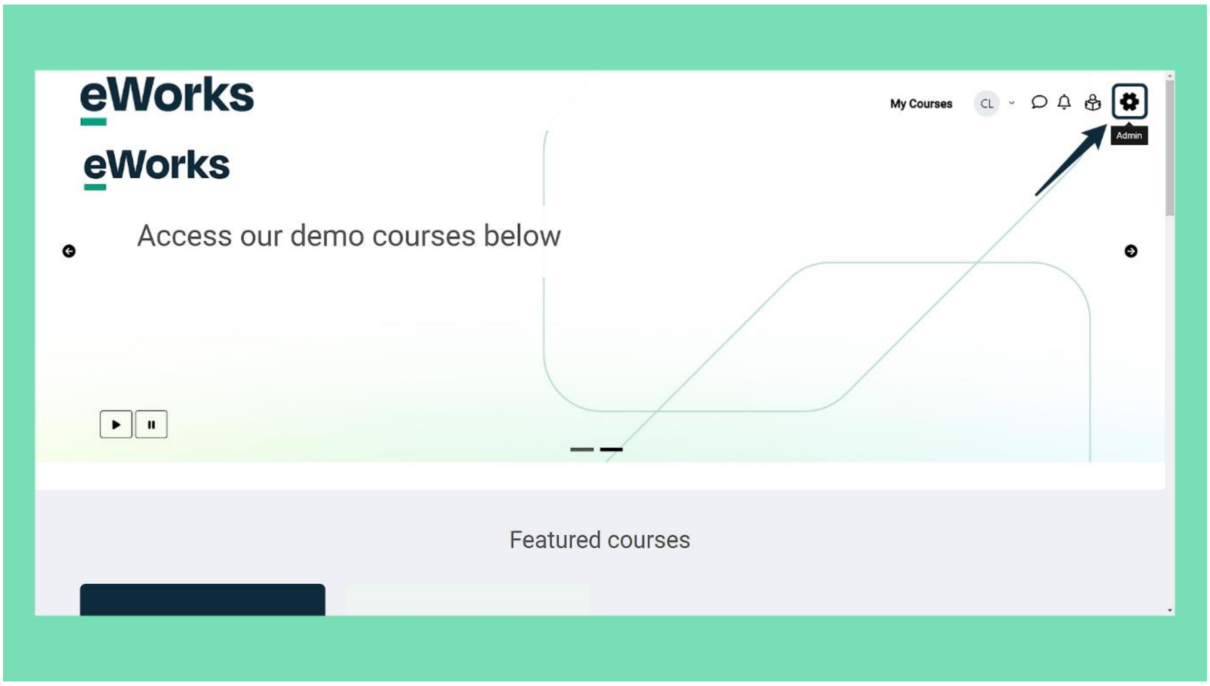
Programs Set up

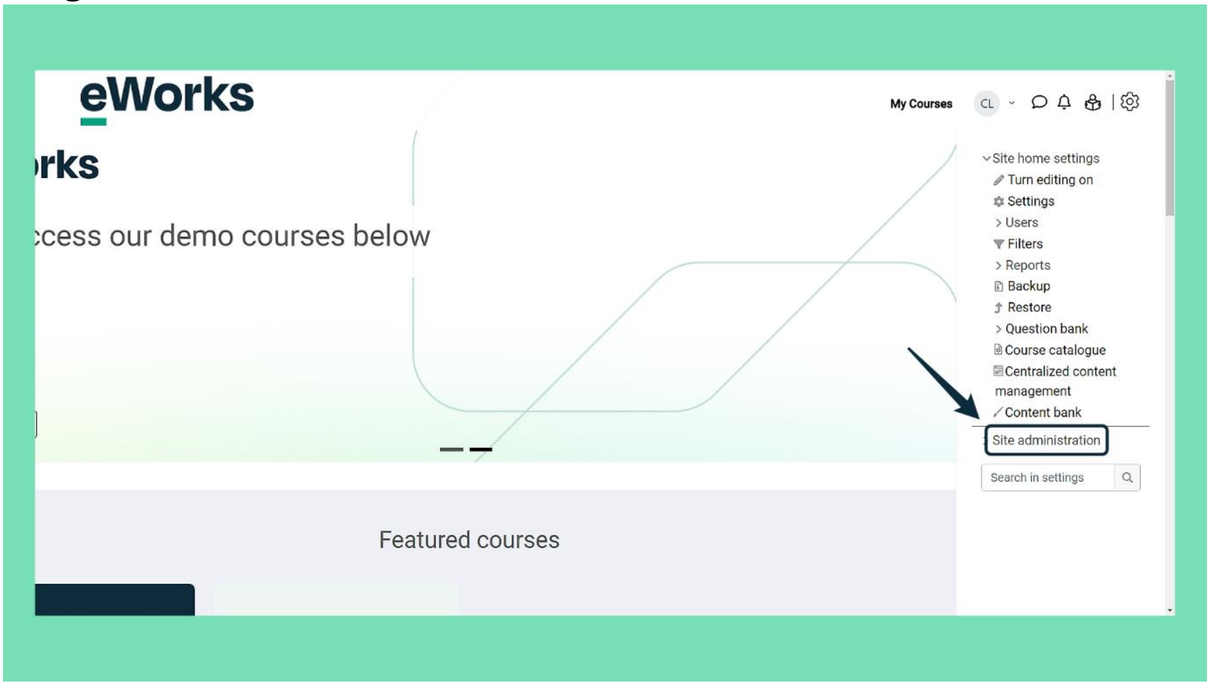
1. Admin Settings Cog

Welcome to our user guide video on setting up Programs in your LMS. To get started, click on the admin cog.



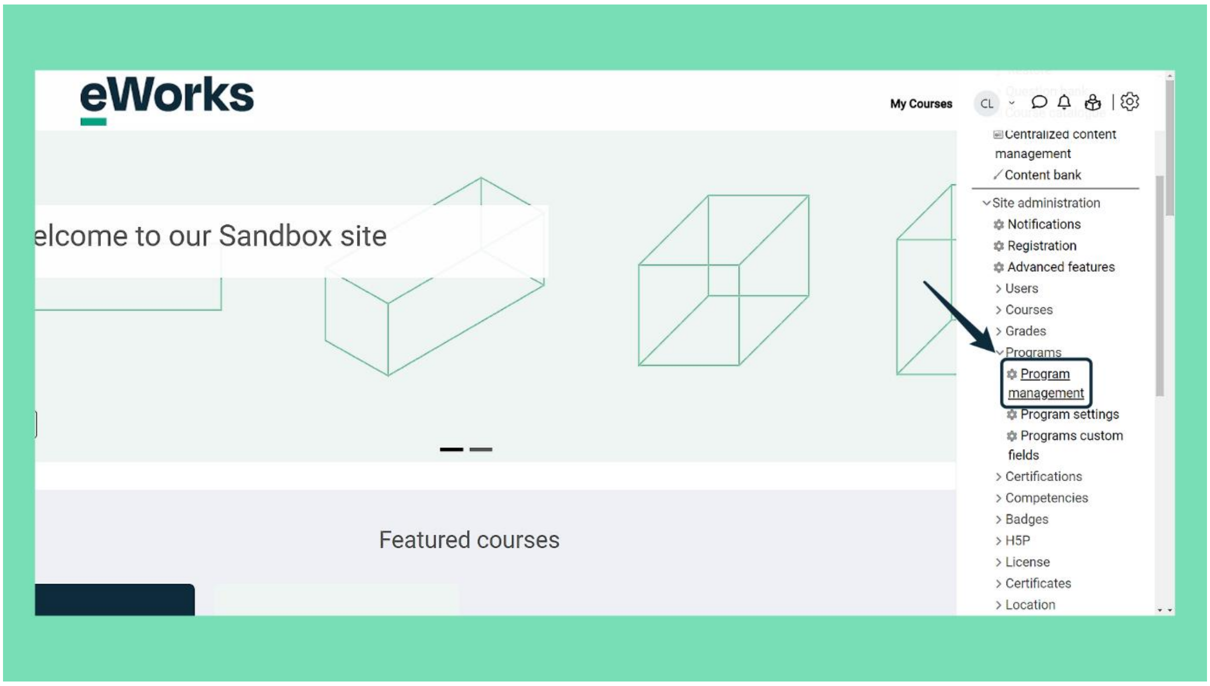
2. Site Administration Menu

Navigate to the 'Site administration' section.



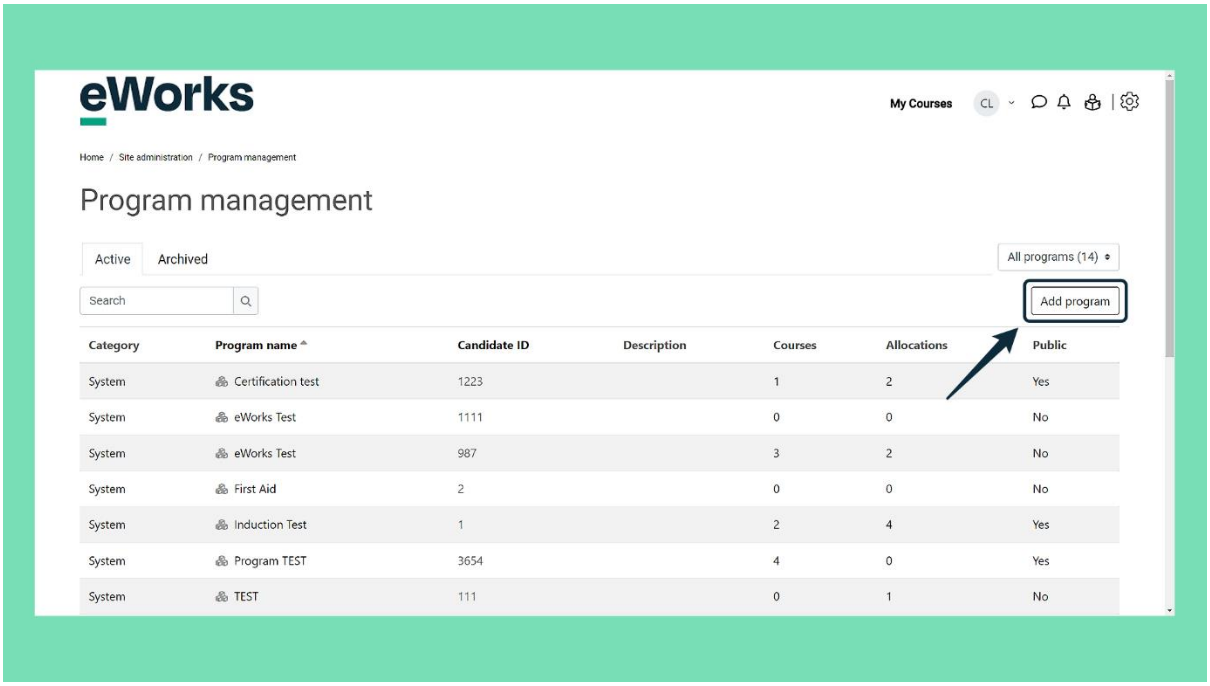
3. Programs > Program Management Menu

Click on the Programs Menu, followed by Program Management



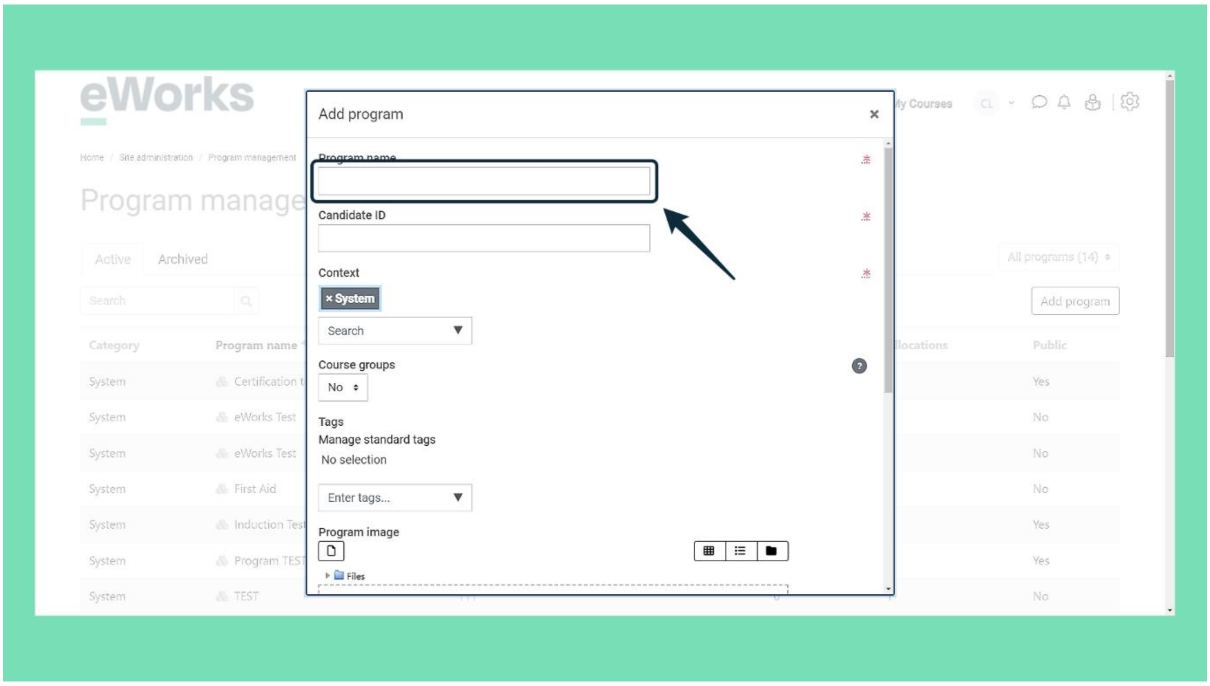
4. Add a Program

Click on Add progam to create a new program.



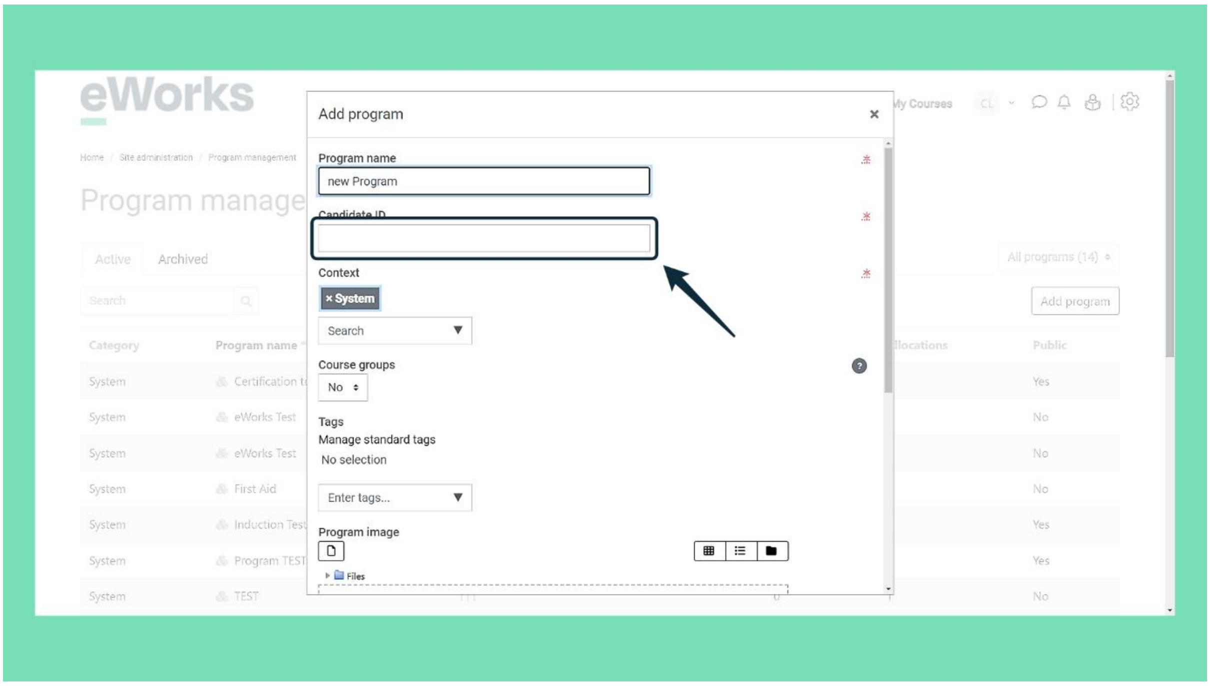
5. Program Name

Enter the name of the program in the input field.



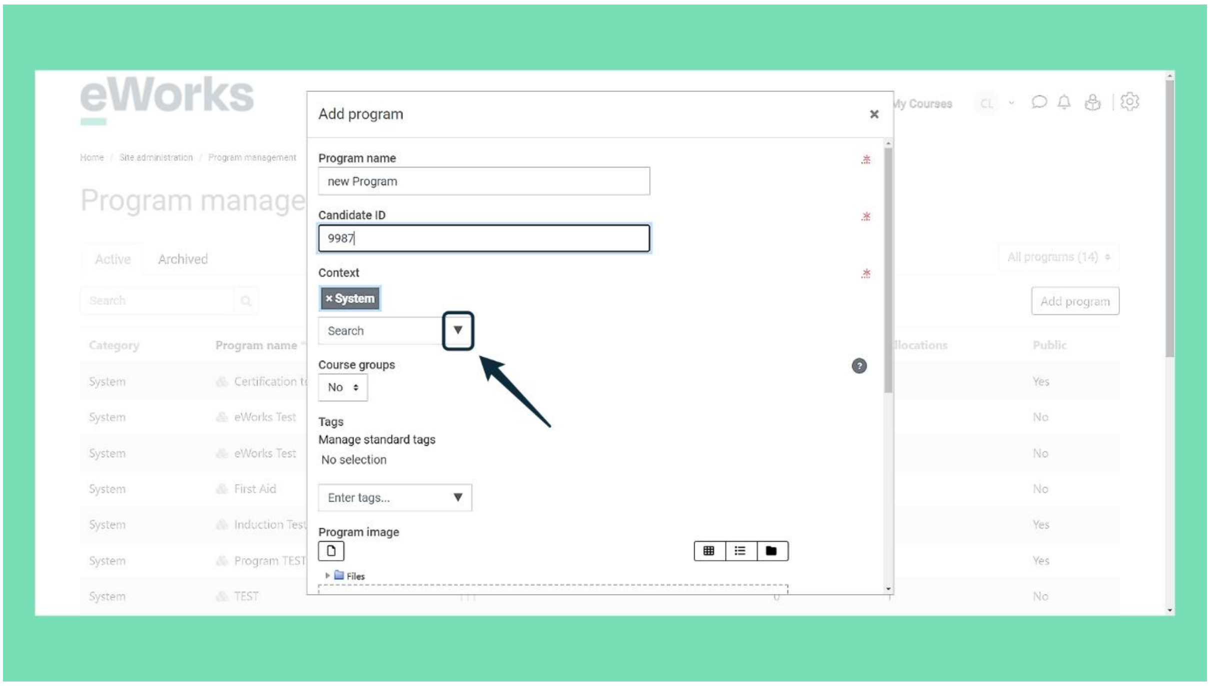
6. Candidate ID

Enter a candidate's ID in the provided field. Note this is a compulsory field but not required anywhere, so you can put any number.



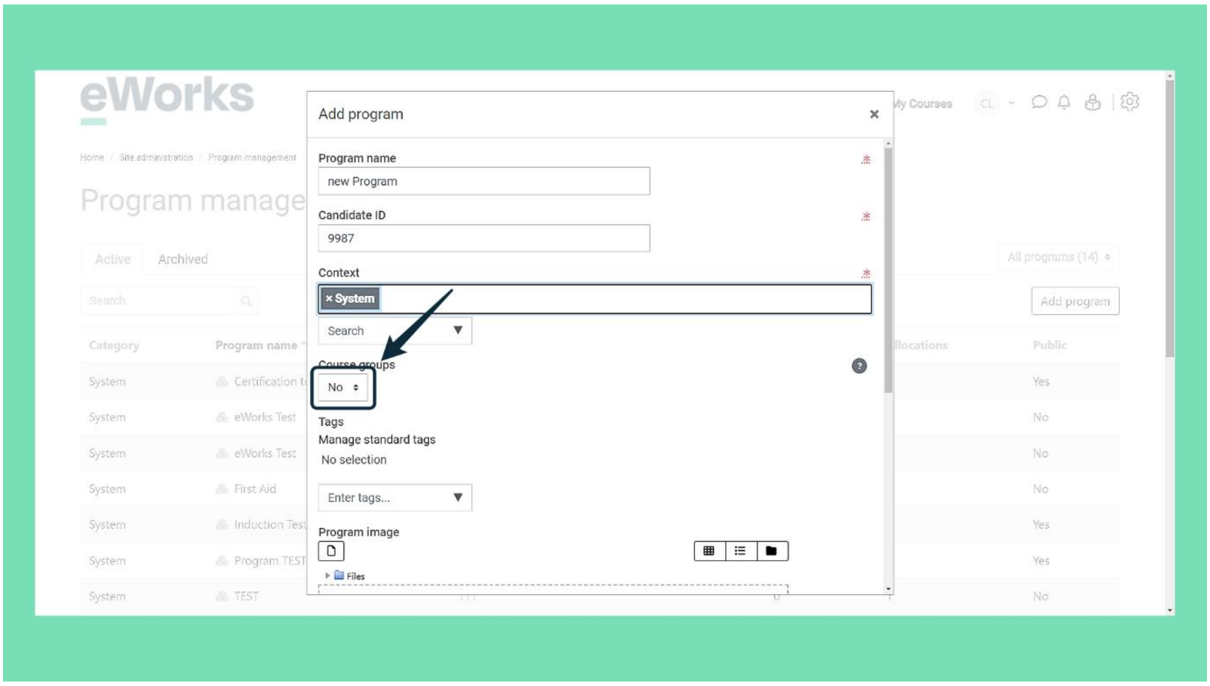
7. Context

Use the context section to choose a specific category to which this program should be applied in your LMS. Otherwise, leave it as the system default.



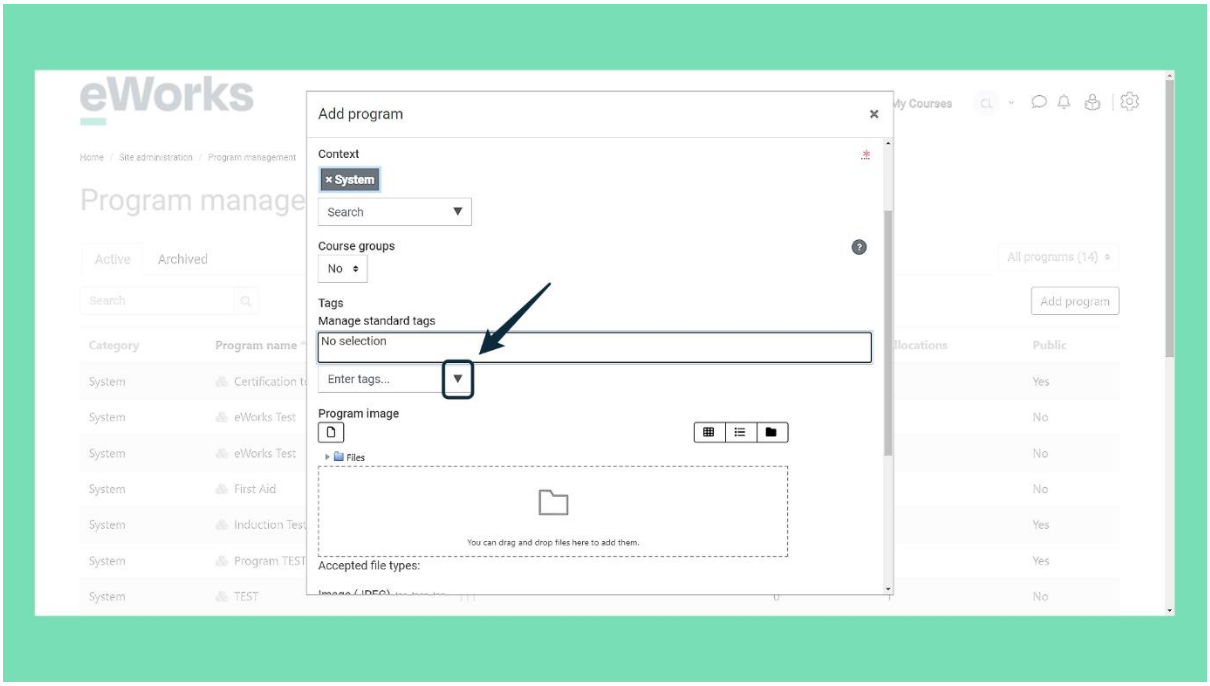
8. Course Groups Selection

Choose 'Yes' or 'No' for course group inclusion.



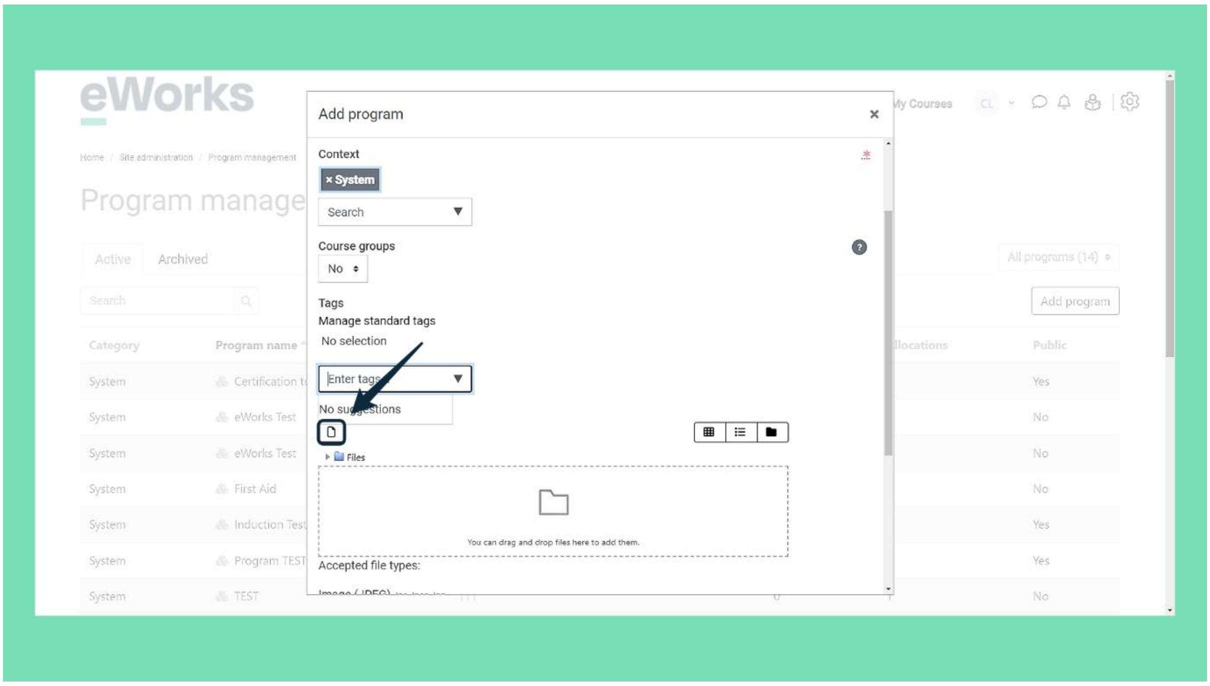
9. Tags

If you use tags in your LMS, you can select appropriate ones here.



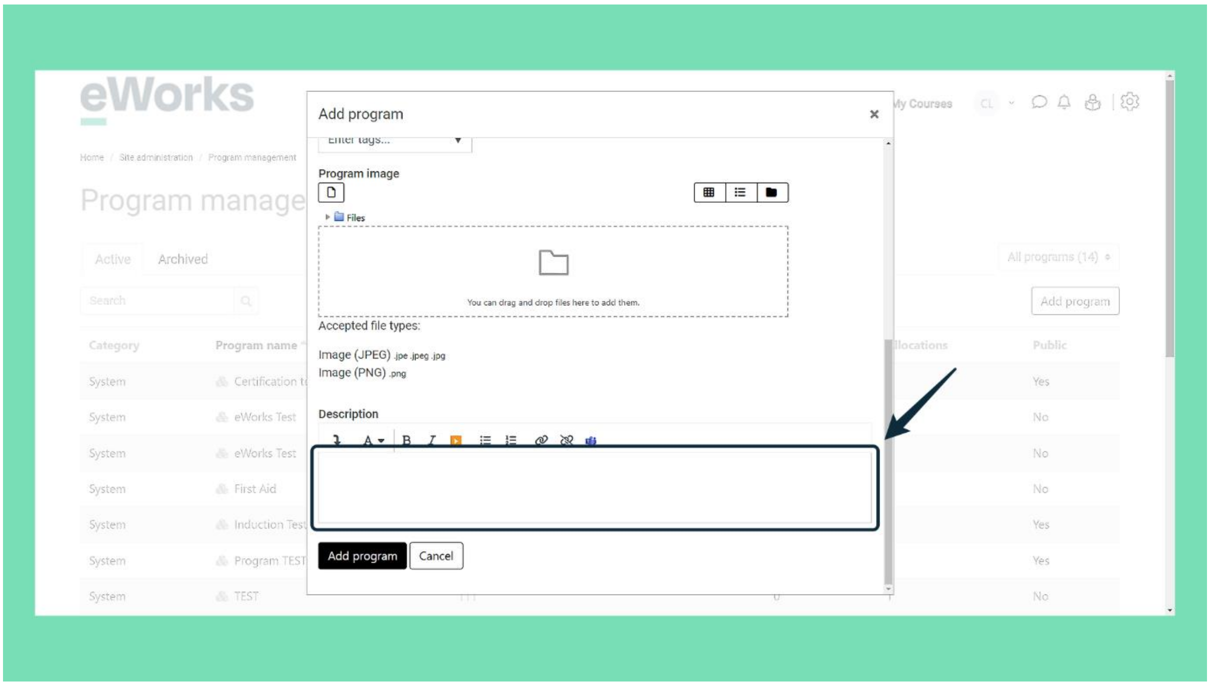
10. Add Image

Click the icon to add a image for the Program.



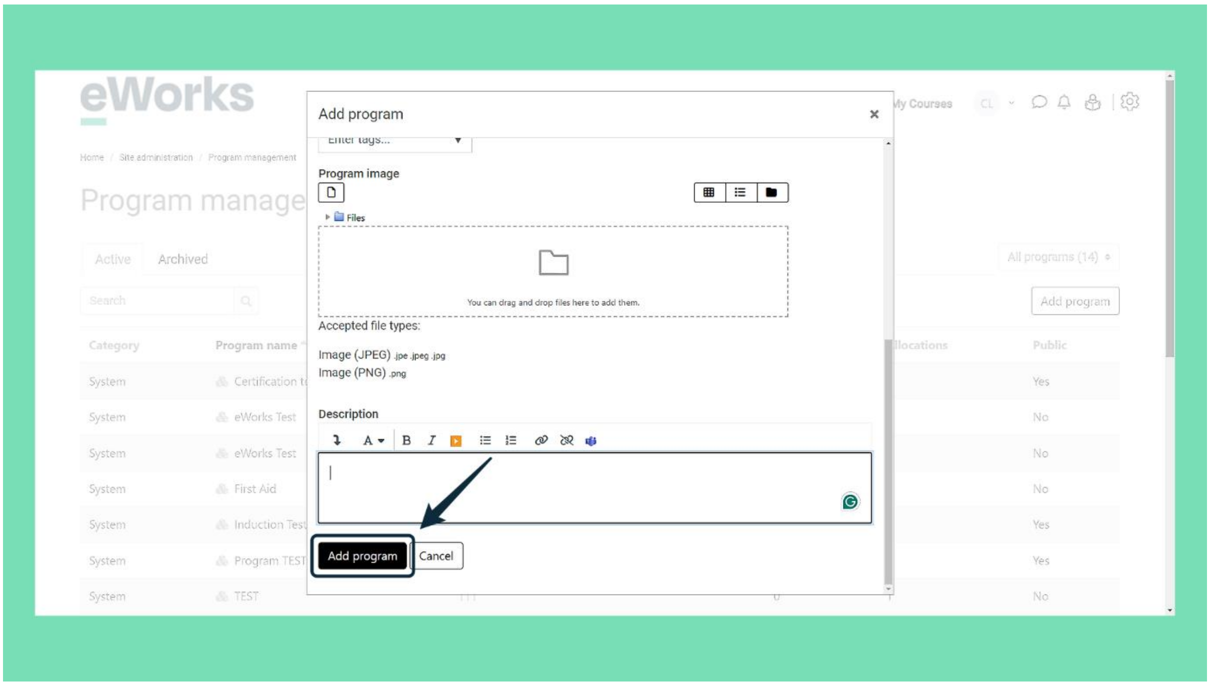
11. Add Program Description

Enter the details of the program in the provided text box, if required.



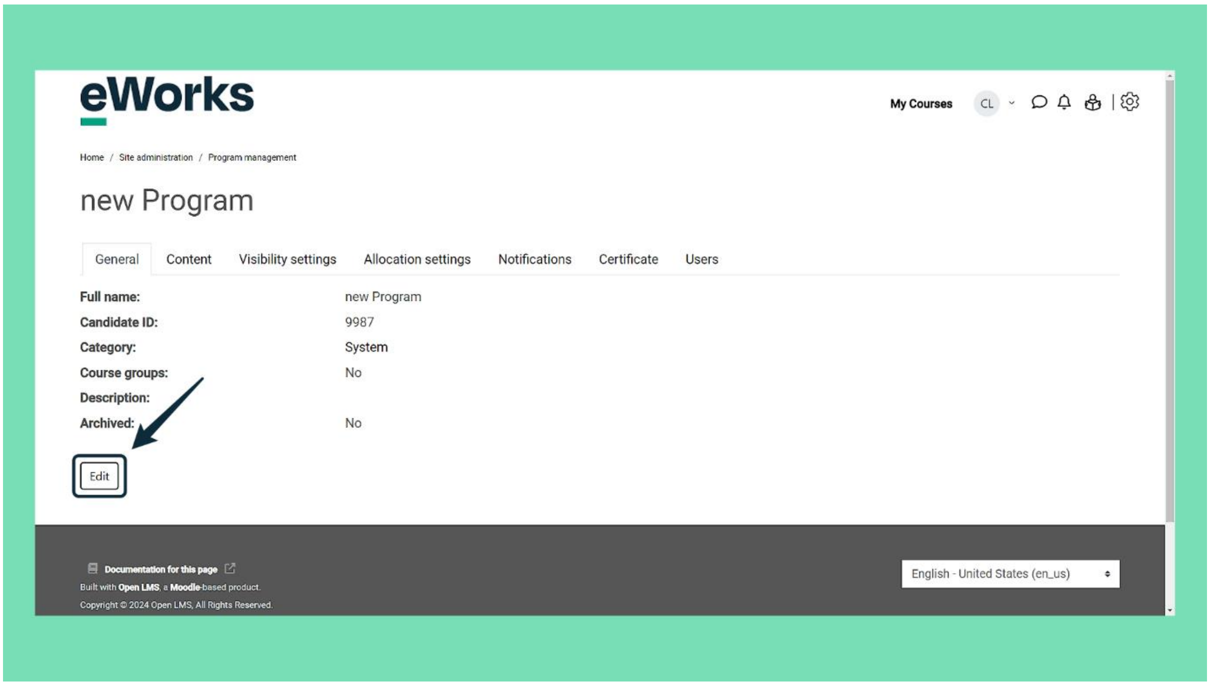
12. Save your Program

Click the 'Add program' button to save your new program settings.



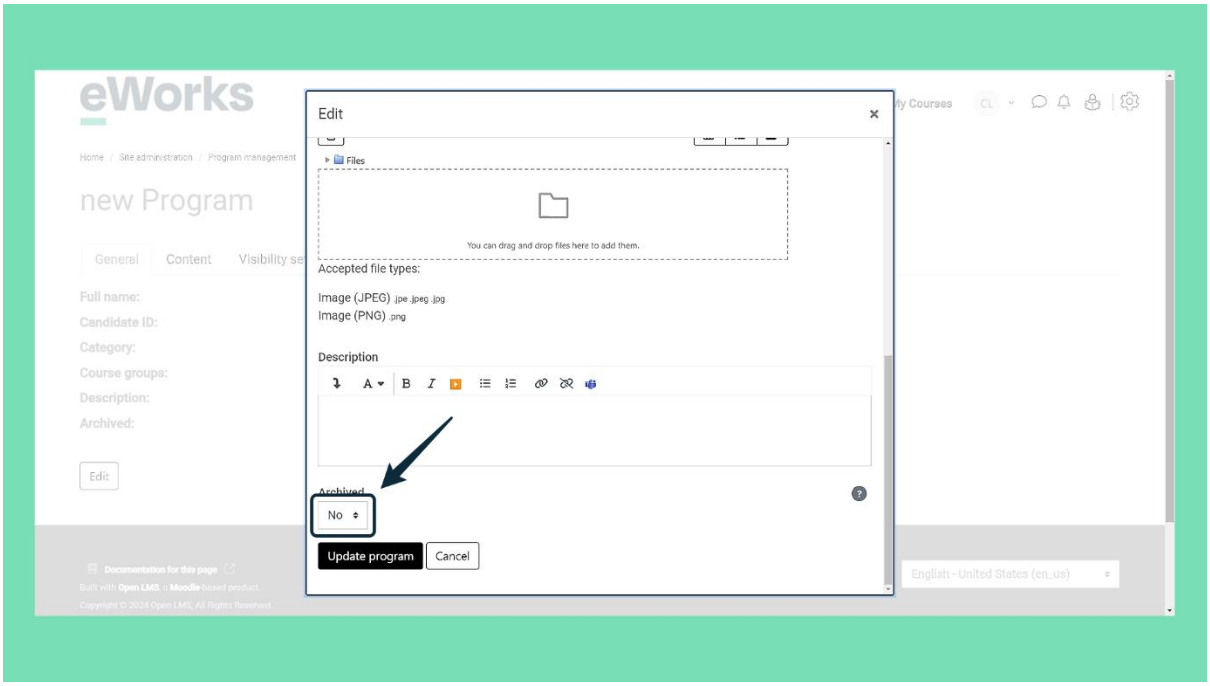
13. Editing your Program

Click here to modify the program details and return back to the original settings page.



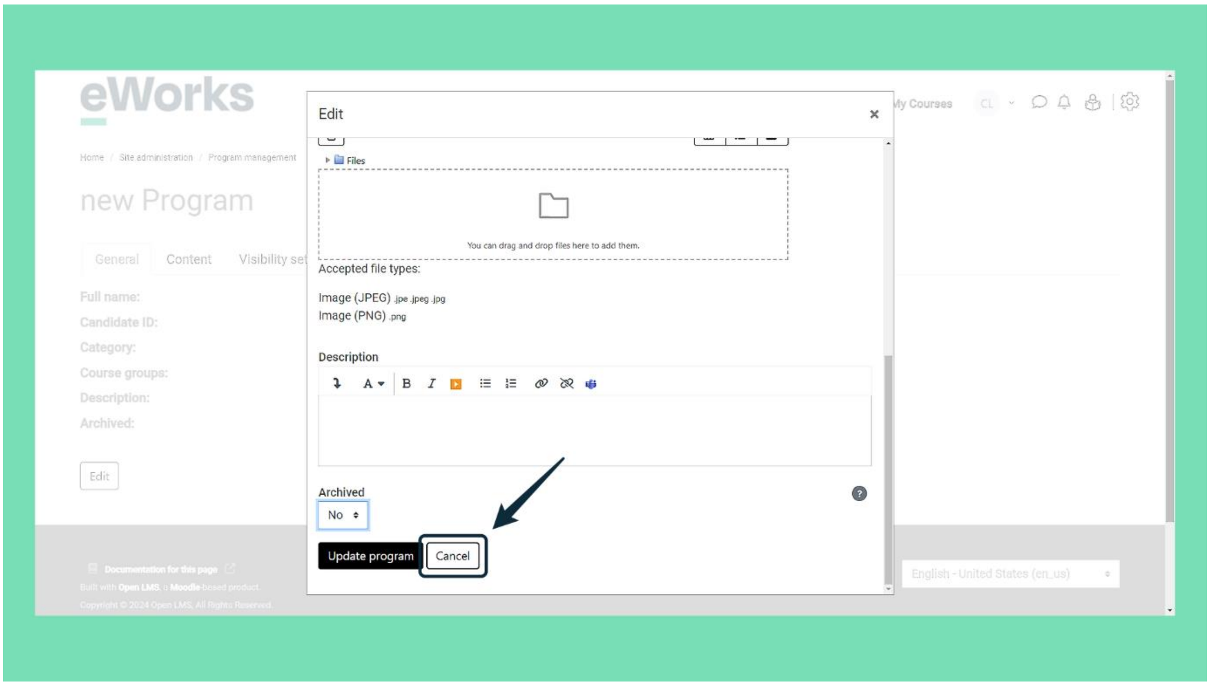
14. Archive Option

You will also see one new option. The ability to choose 'Yes' or 'No' to indicate if the program should be archived.



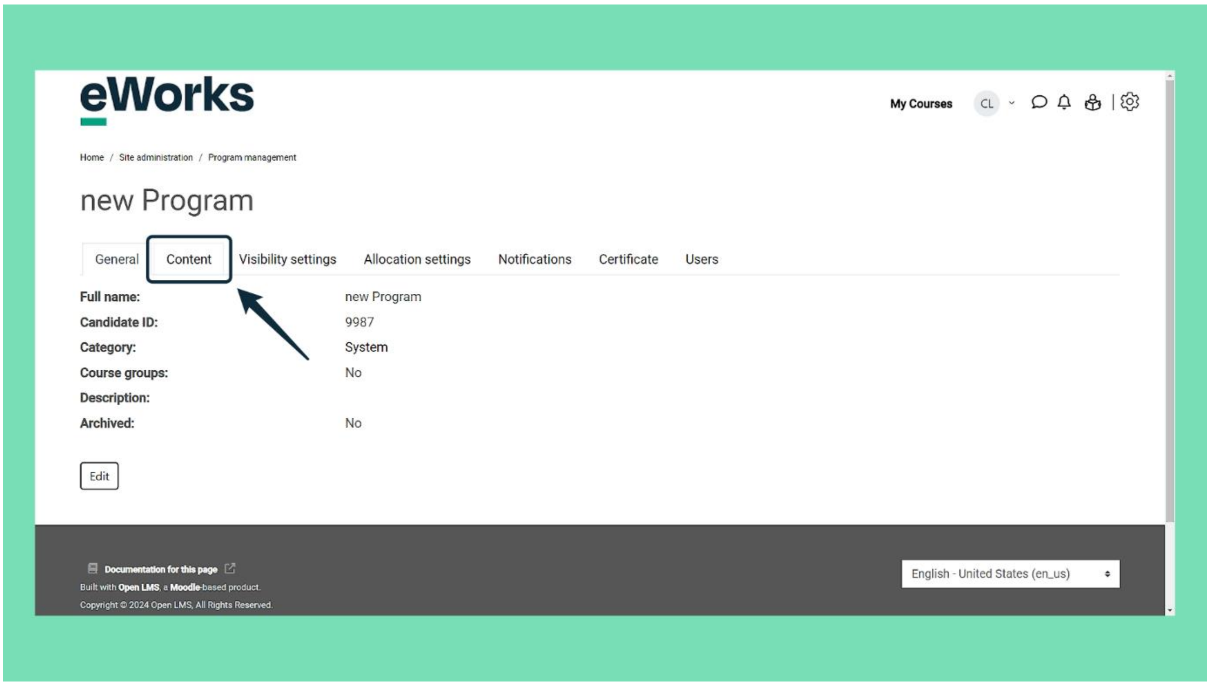
15. Save your Program

When finished, click on Update Program or cancel.



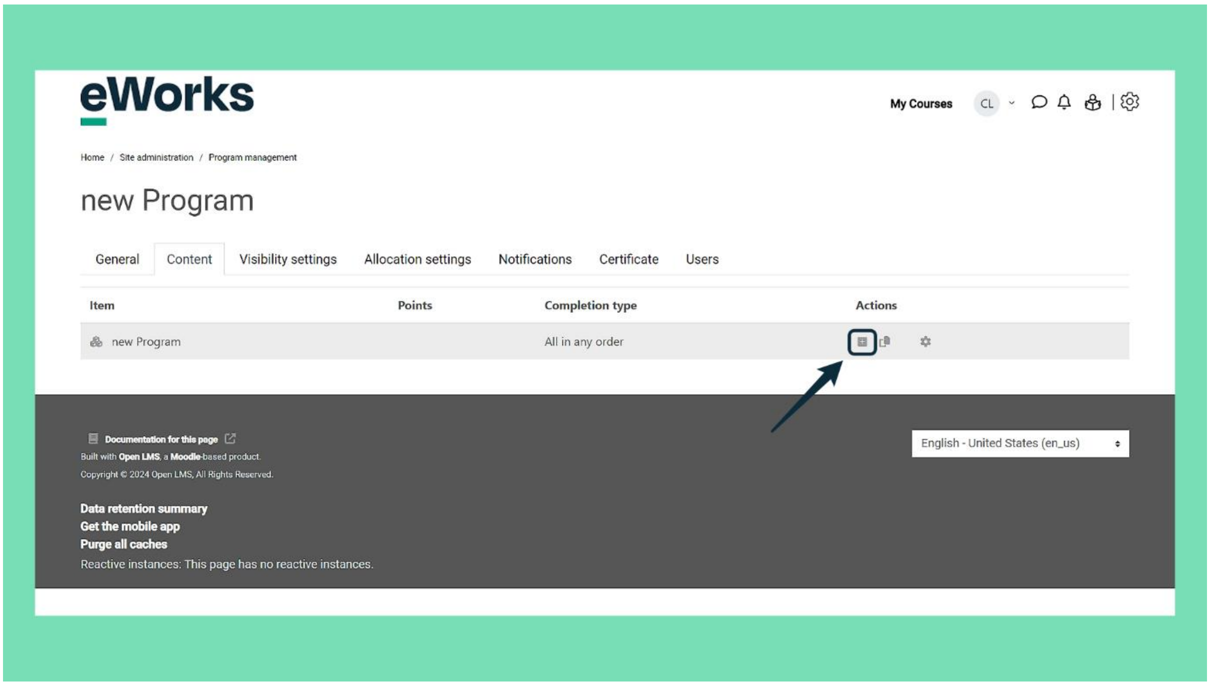
16. Content Tab

Click on the Content tab to manage program courses.



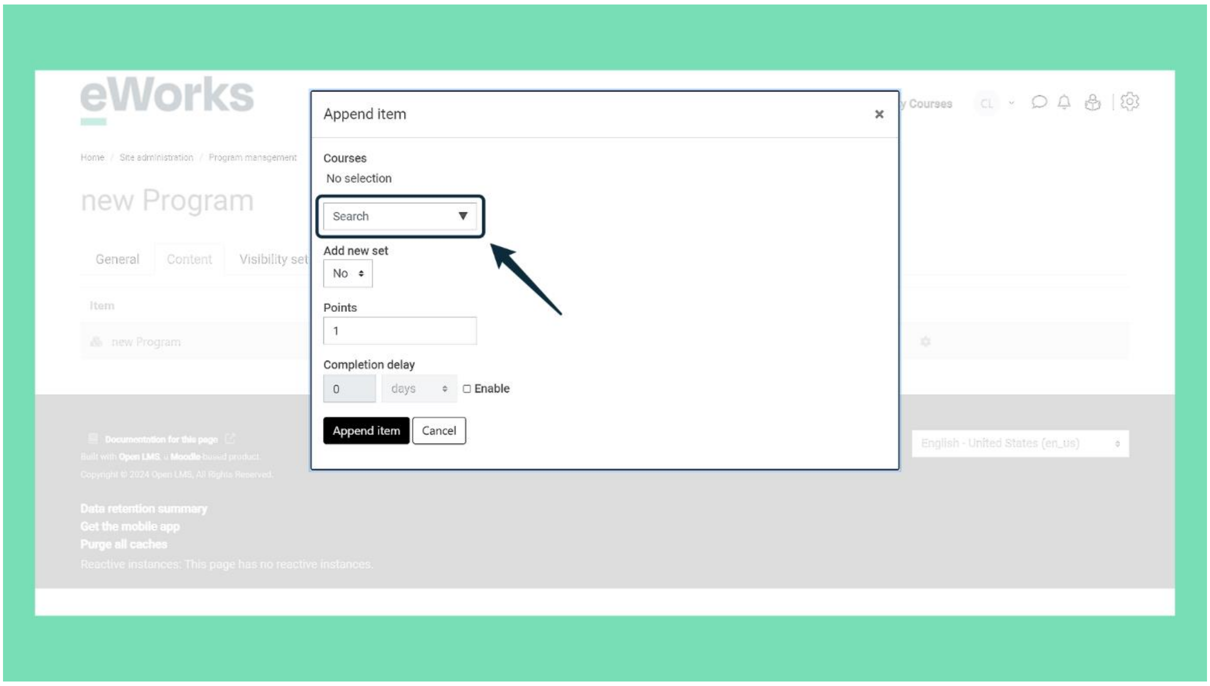
17. Allocate courses

Click the plus icon to choose which courses to allocate to this program.



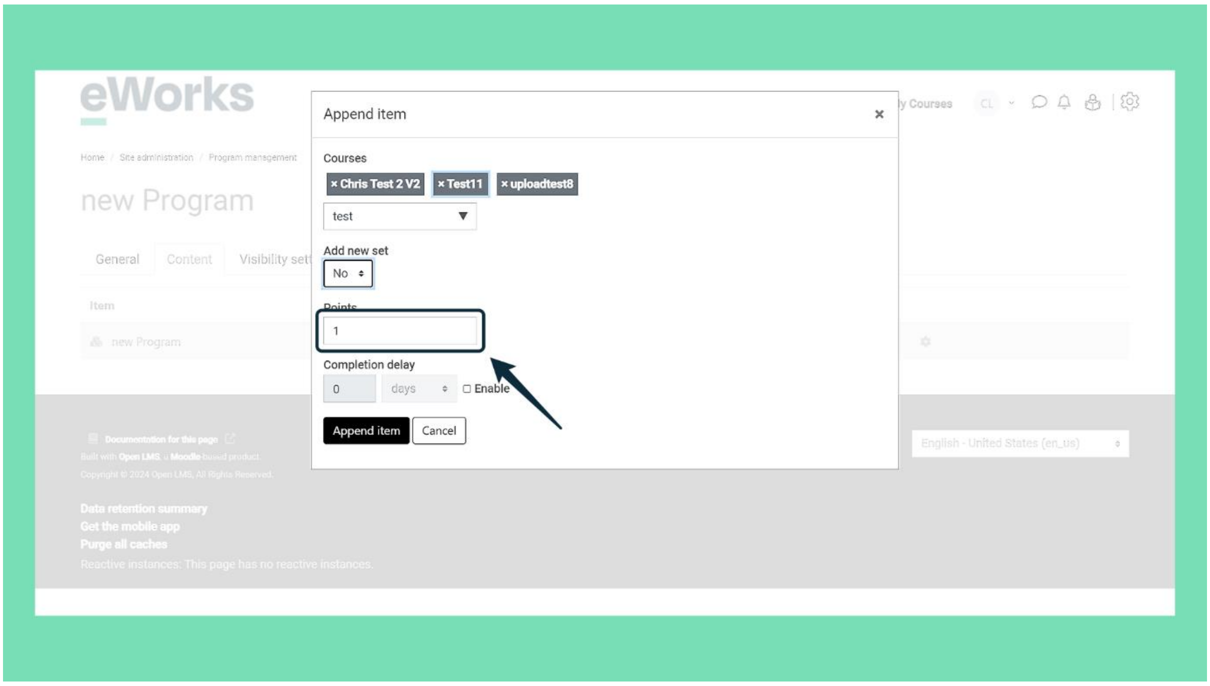
18. Course Selection

Select your courses from the dropdown menu.



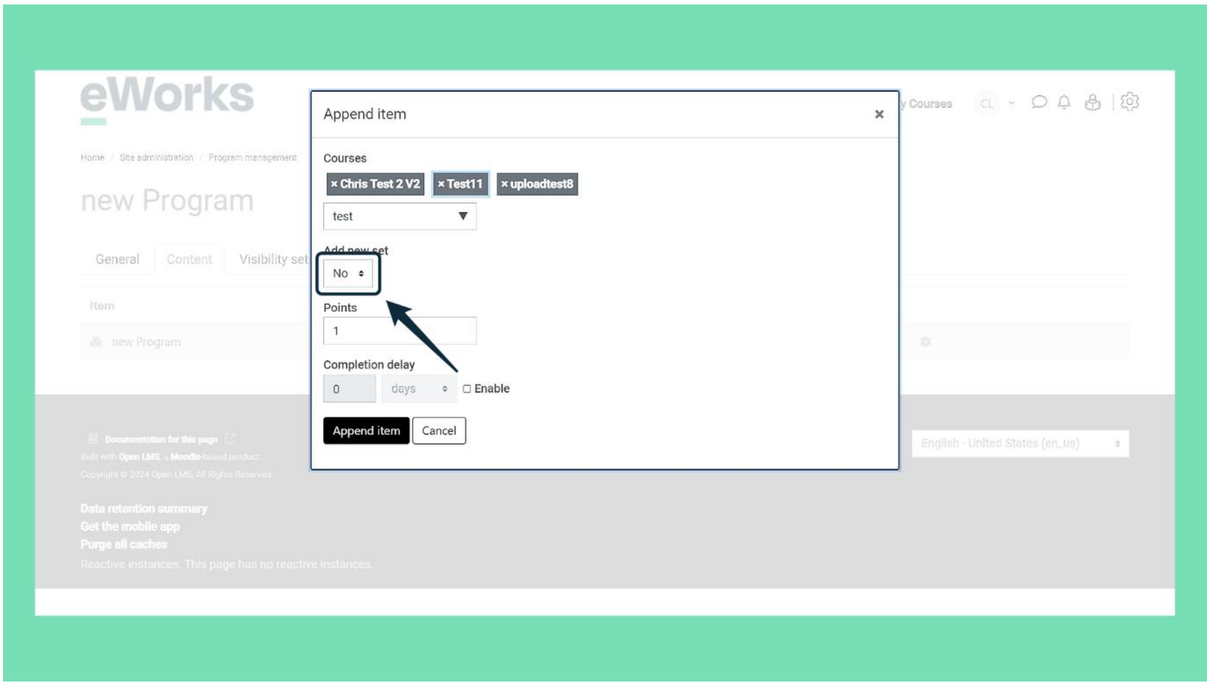
19. Select your courses and allocate points

In this example, we have chosen three courses. You can also allocate points to a course. You will see how we can use this in the Content Settings.



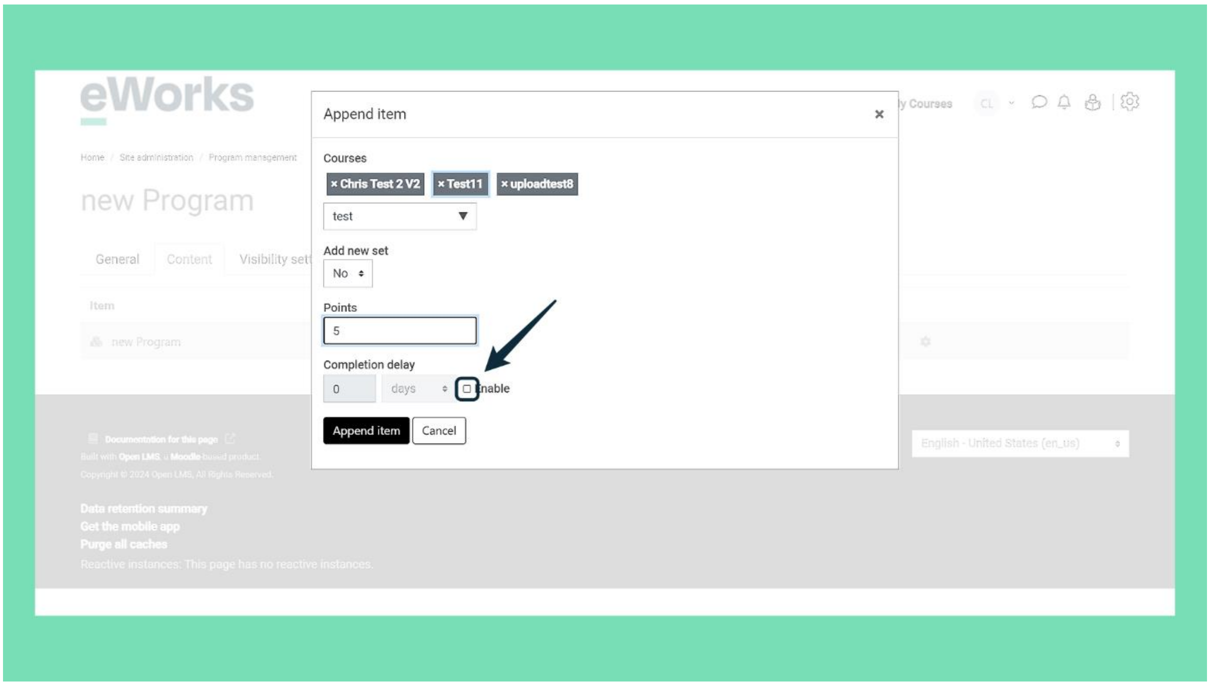
20. Add new set

The add new set option allows you to group courses together. For example, you might have 2 courses in one set and then 3 courses in set number two.



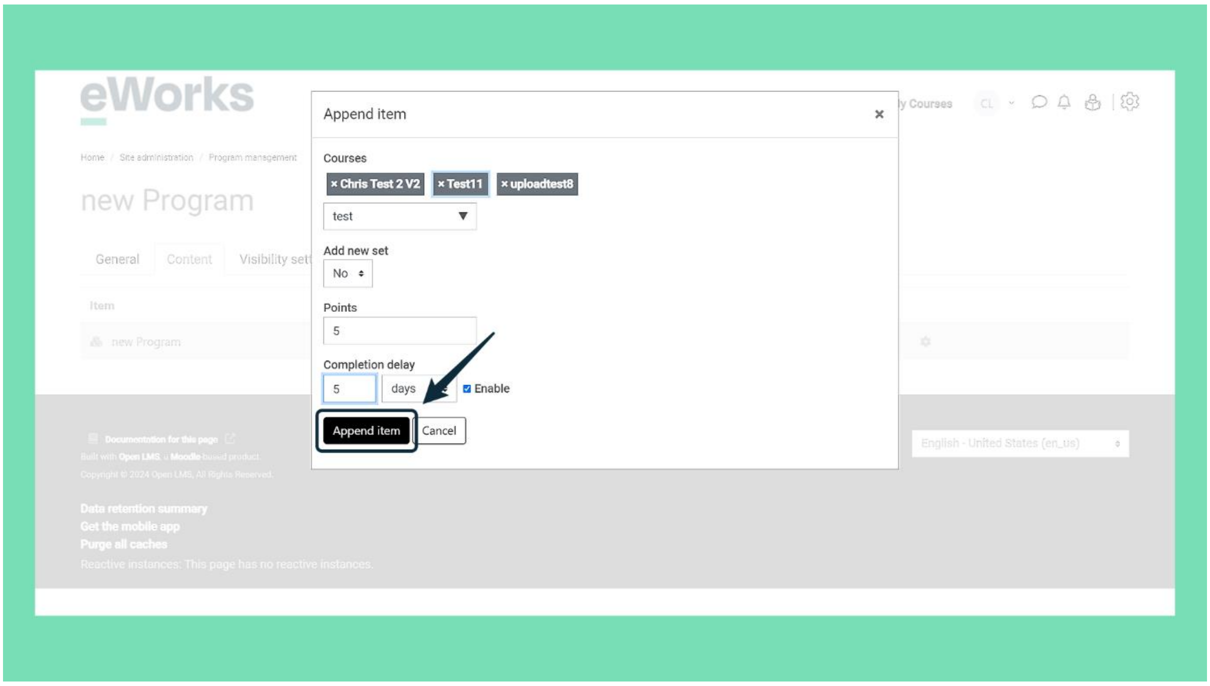
21. Enable Completion Delay

Check the box to activate the completion delay feature. This will add a delay between users completing the first course and then moving on to course number two, and so on.



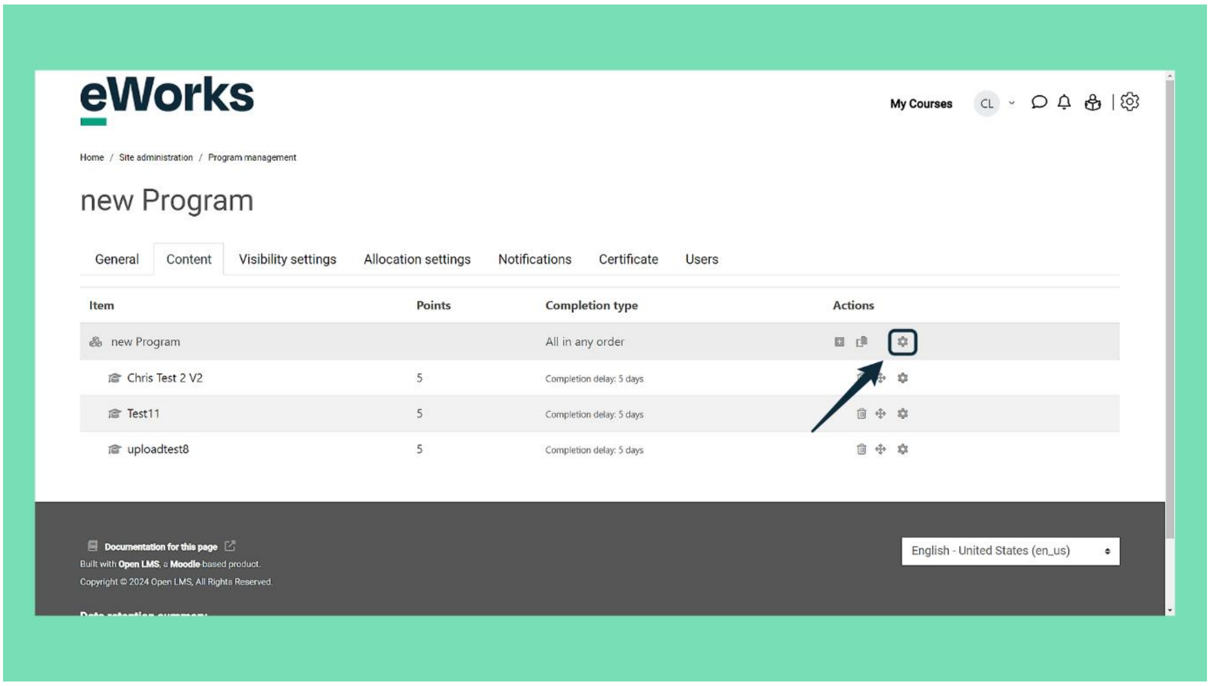
22. Save your content selection

Click on Append Item when finished.



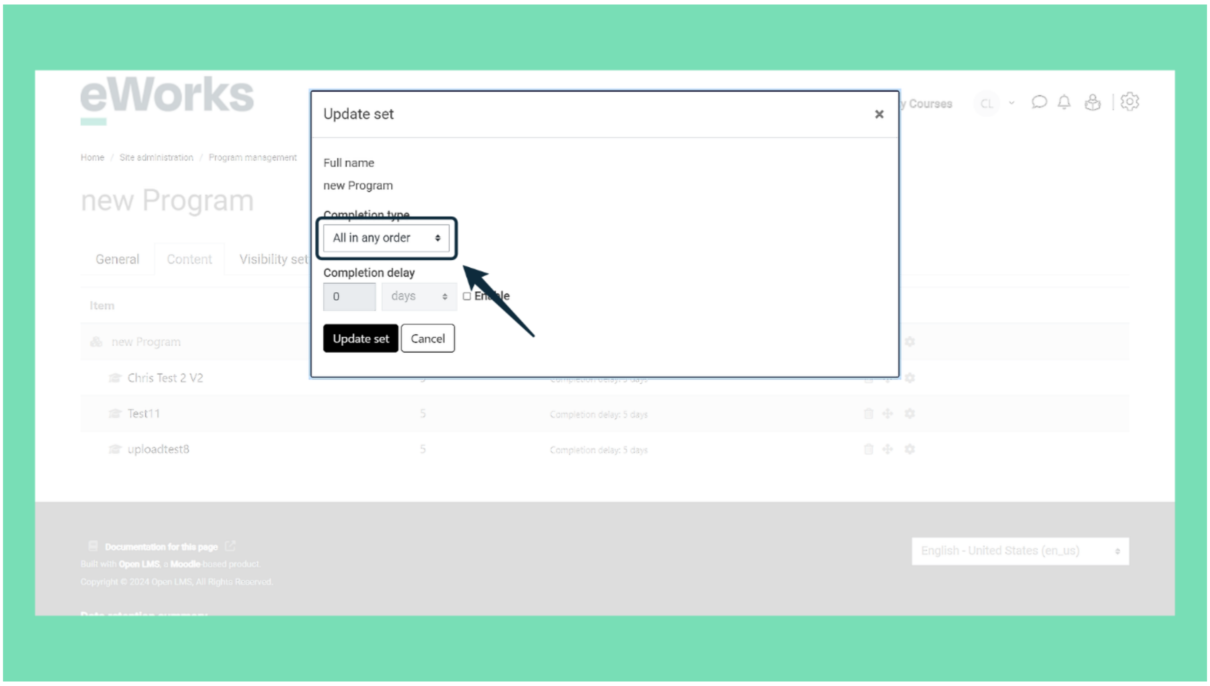
23. Content Settings

Click the gear icon to modify the settings for this program item.



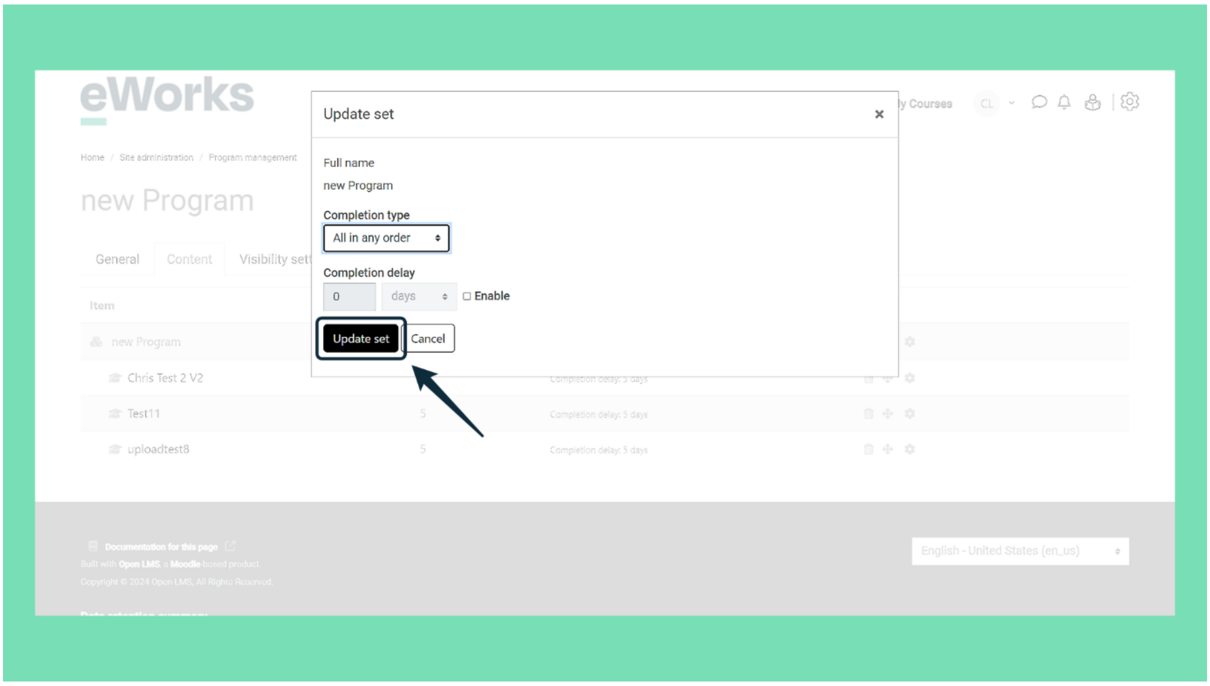
24. Completion Type

Under completion type, you can select "all in any order" for users to complete as they like. "All in order" will force users to complete the courses in the required order. "At least x" refers to the points allocated to the courses and means users will need to earn the minimum amount of points to complete. Finally, "minimum x points" means users need to complete the courses and earn enough points to be counted as complete.



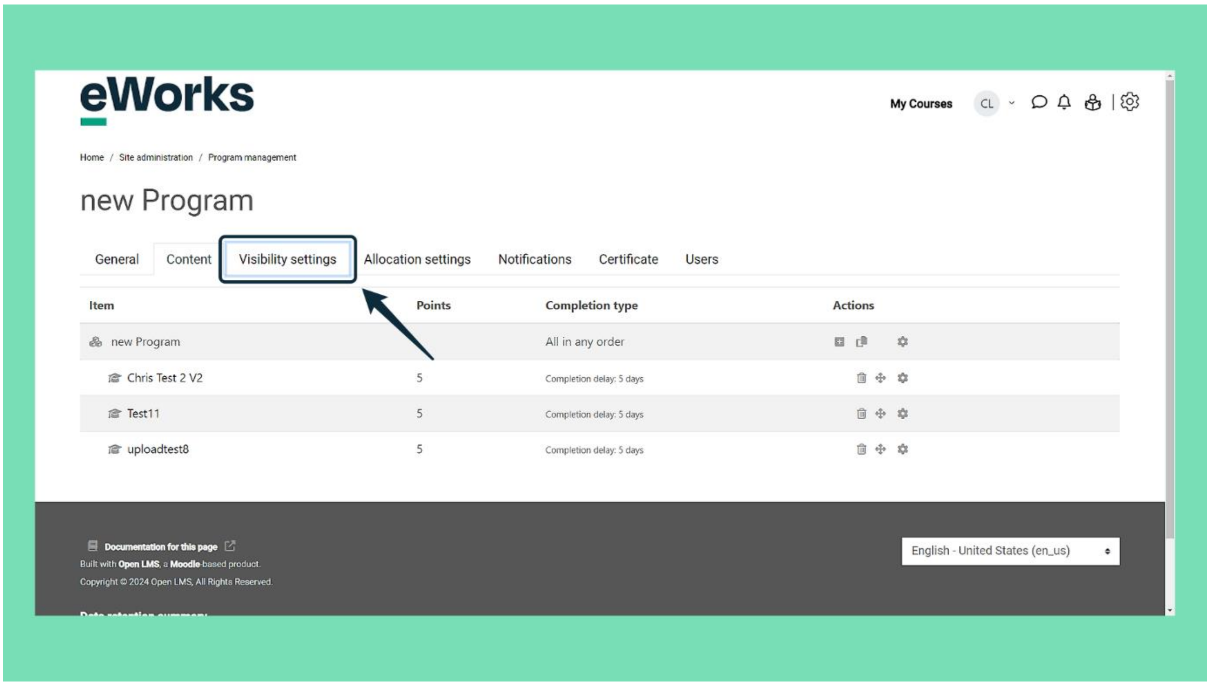
25. Save your Set

Click on Update Set when finished.



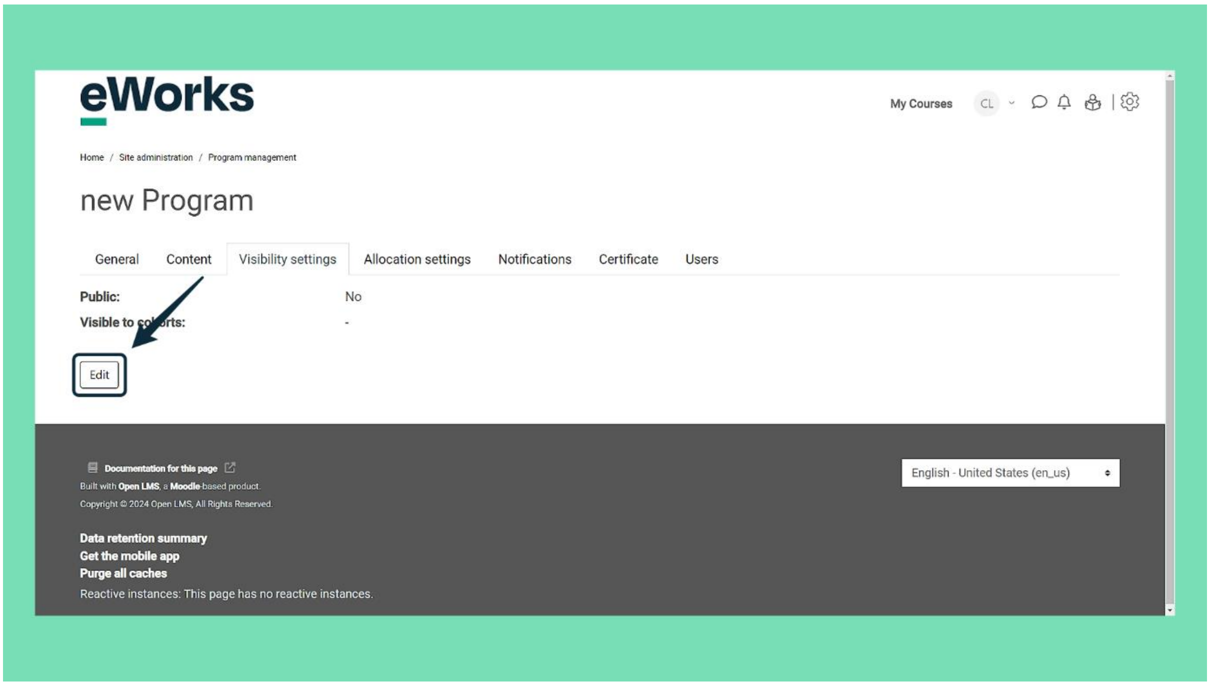
26. Visibility Settings

Explore and configure the visibility options for your program.



27. Edit visibility

Click the edit button to modify the settings.

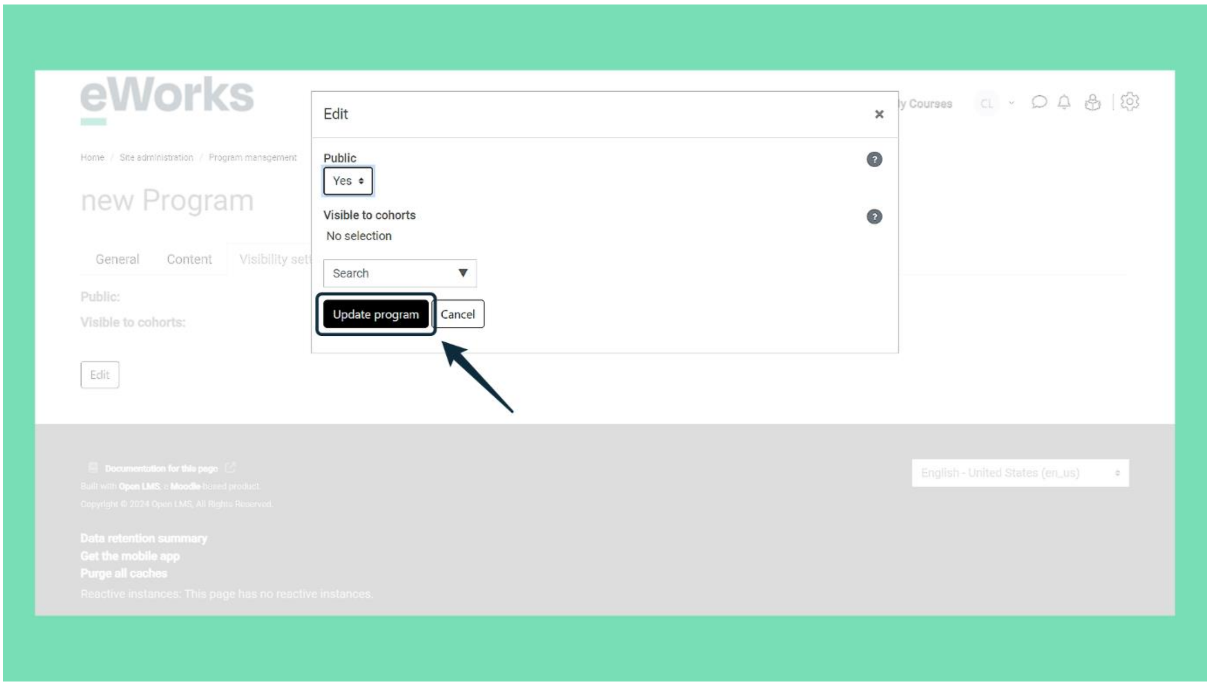


28. Visibility Settings

Set the visibility of the item to either 'Yes' or 'No' using the dropdown menu. Select "No" to hide from users.

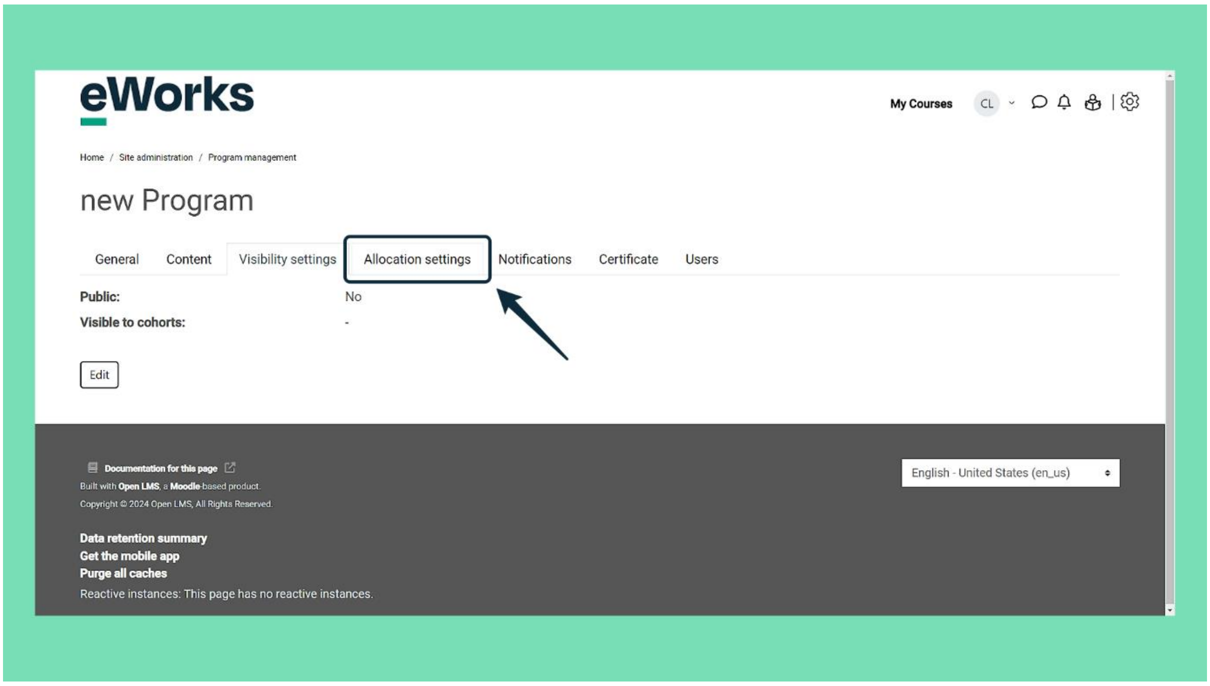
29. Saving the Program

If necessary, you can choose to make it visible to cohorts. When finished, click on "update program."



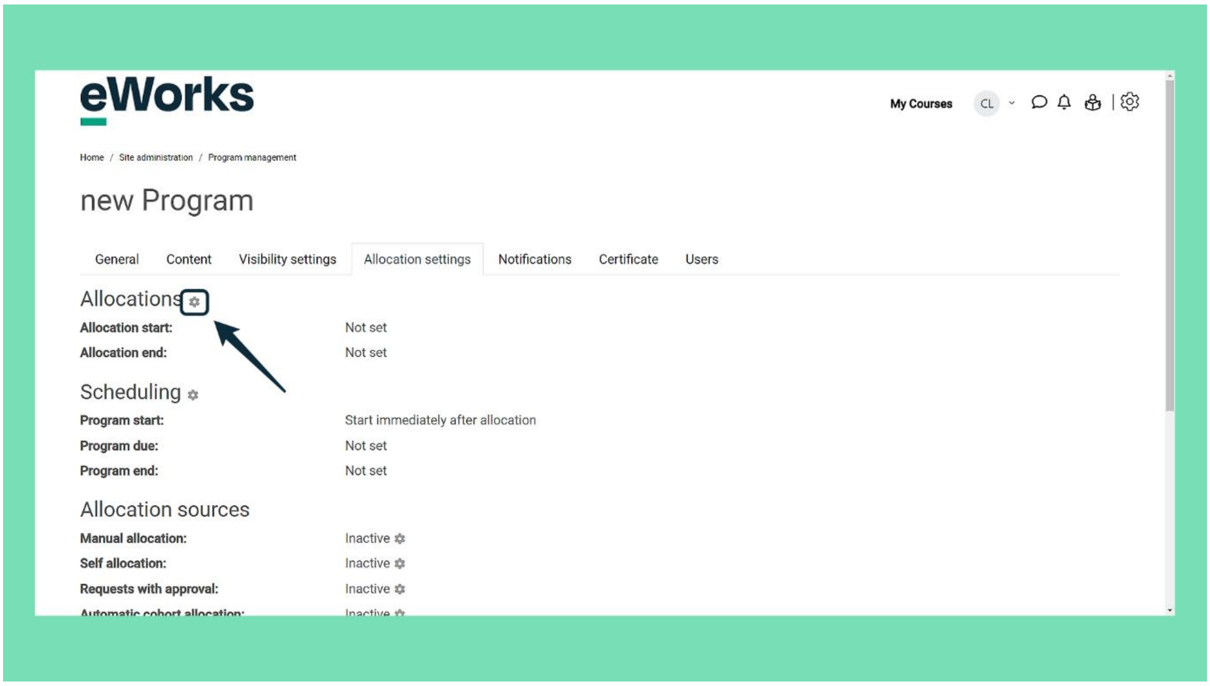
30. Allocation Settings Tab

Review and adjust the allocation settings for the program.



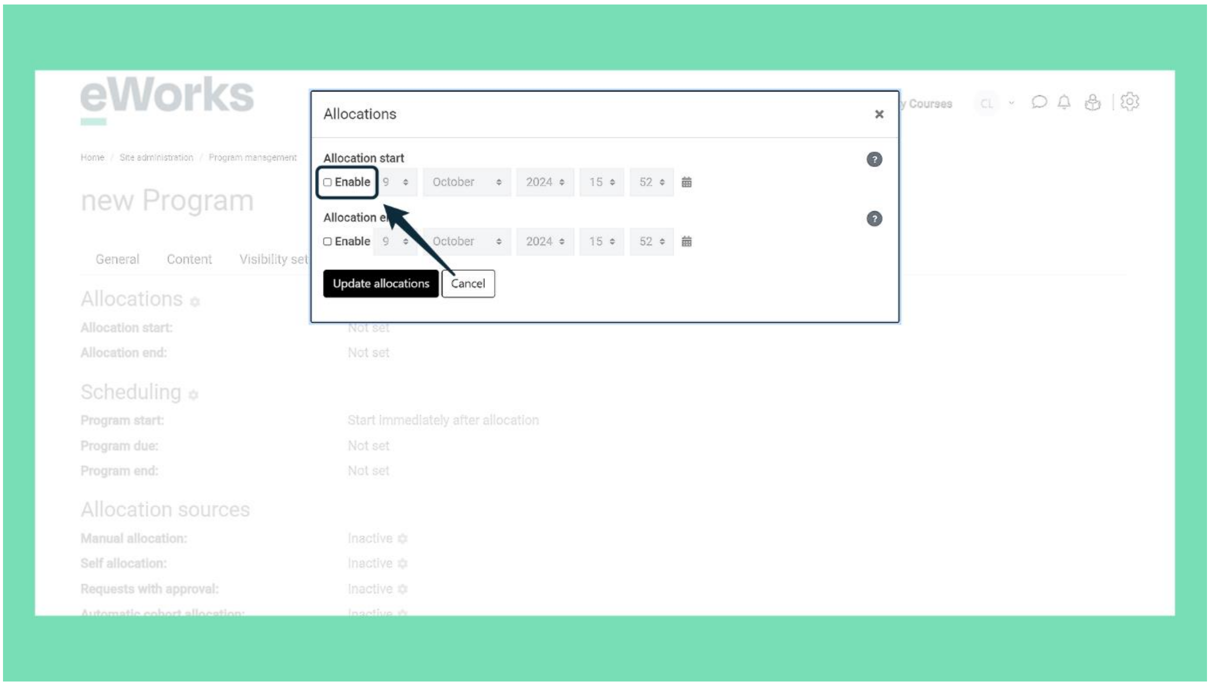
31. Allocations Settings

Click the gear icon to configure the allocation settings.



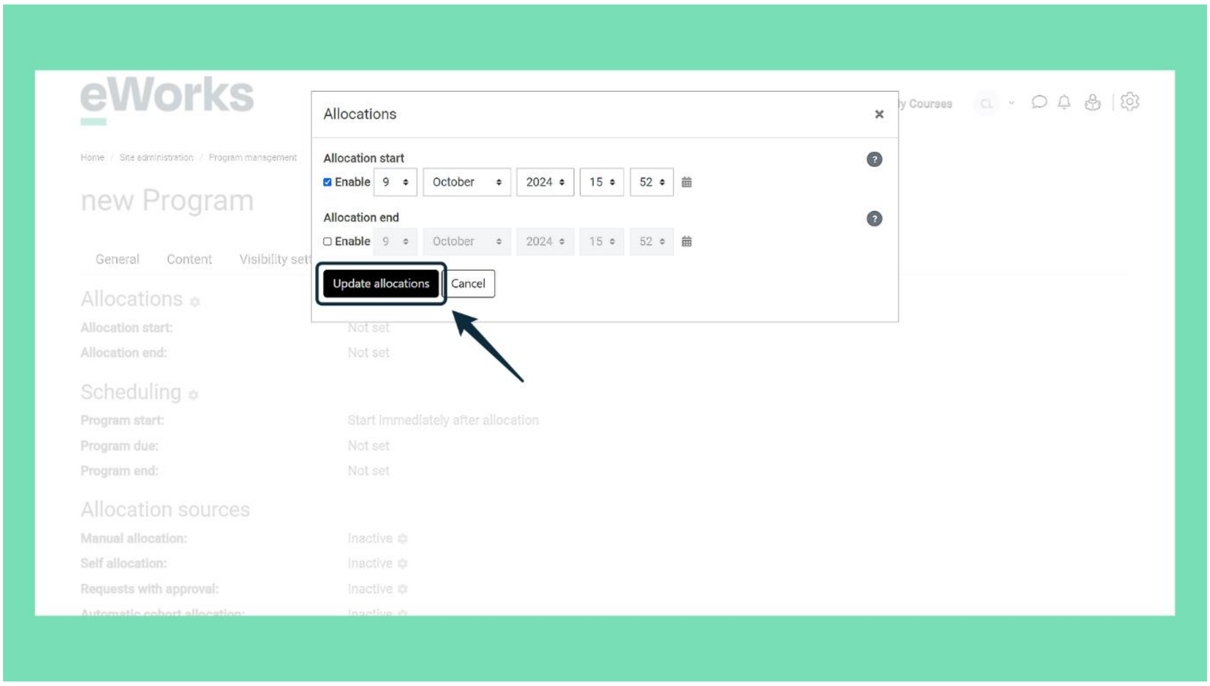
32. Setup allocations

Check the box to enable a date for when users can be added to the Program or when they can no longer be added via the Allocation end date chosen.



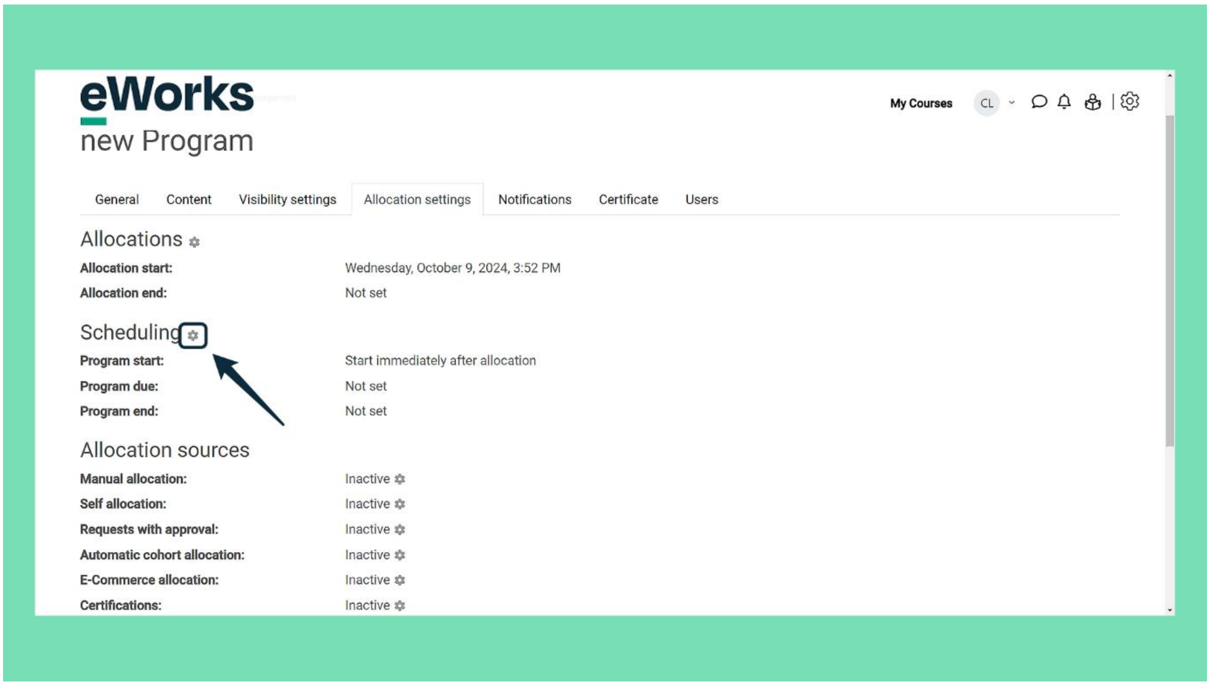
33. Save Allocations

Click to save changes to allocations.



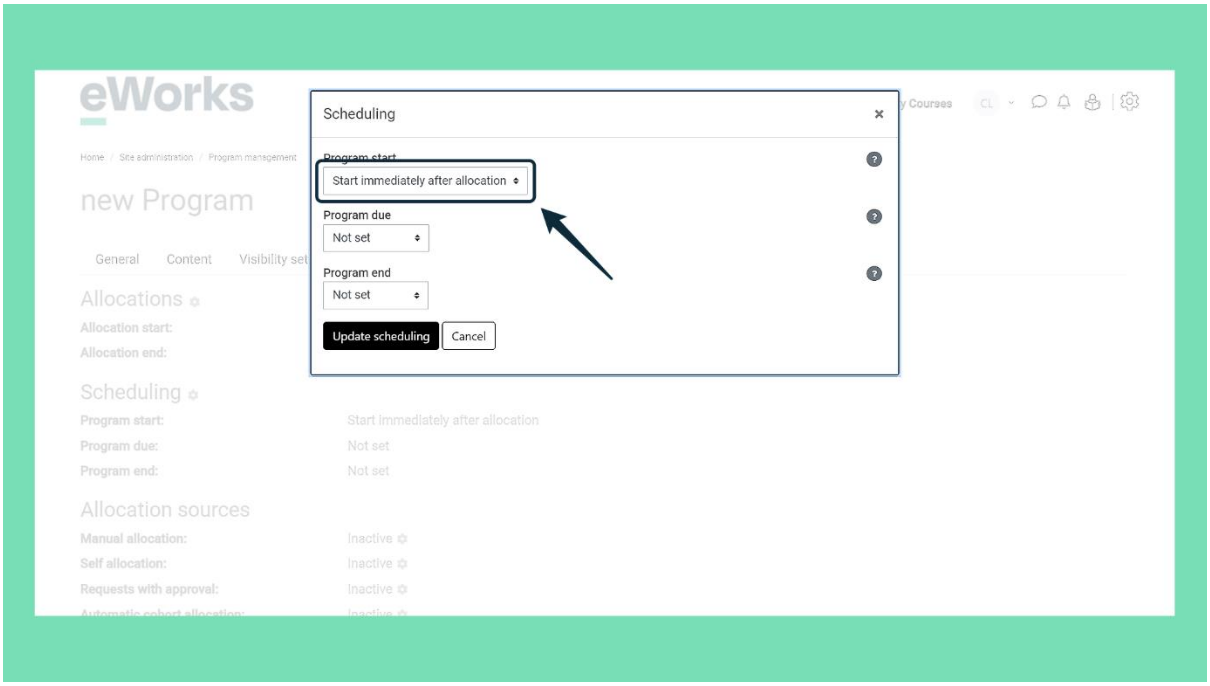
34. Scheduling Settings

Click to configure the scheduling options for the program.



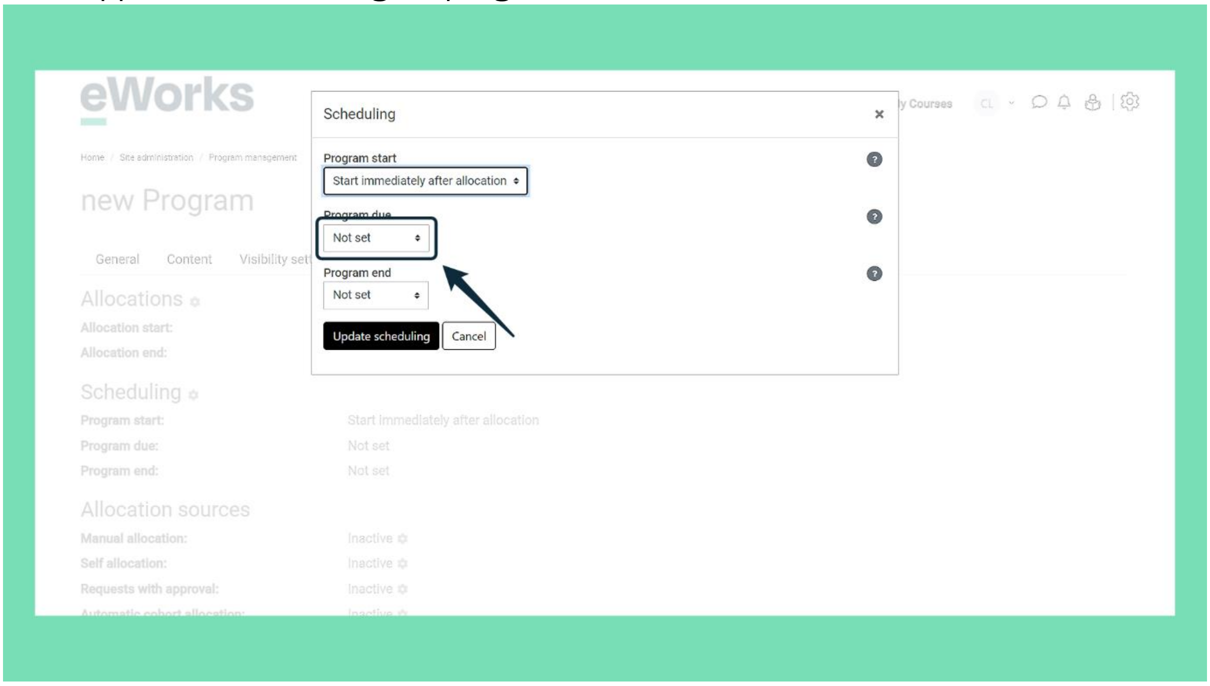
35. Program Start

Select when the program should start after allocation. You can choose to start immediately, at a fixed date or to delay the start by a nominated number of days.



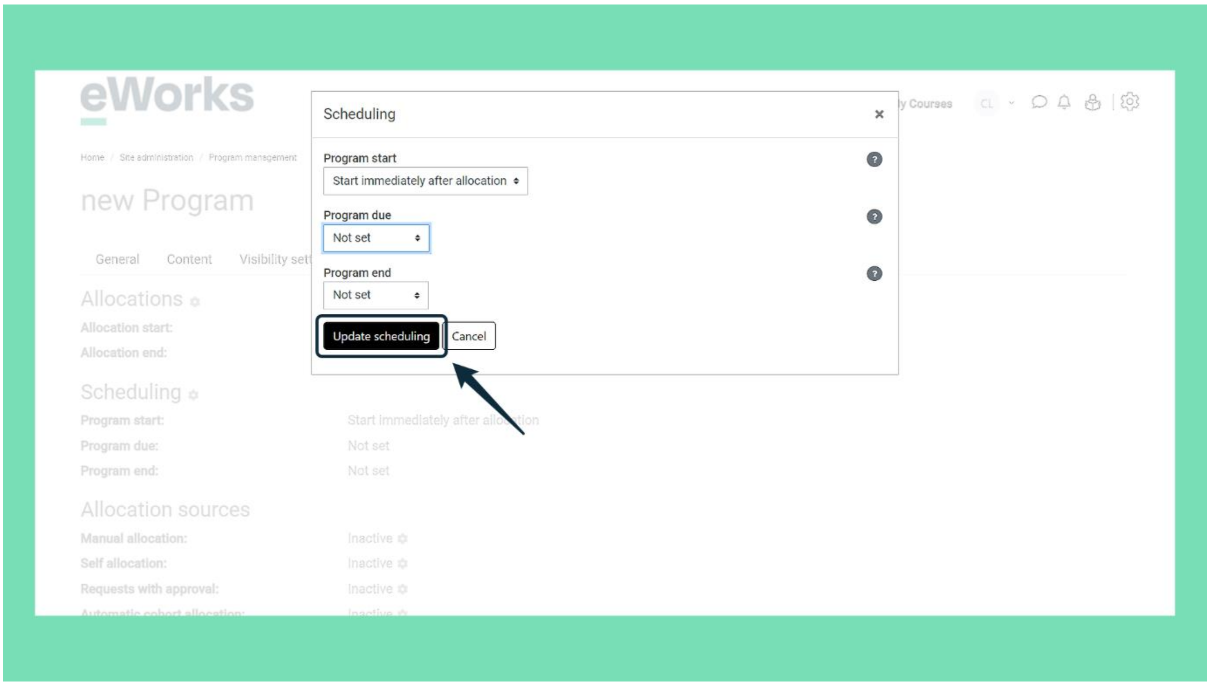
36. Set Program Due and End Date

Use this setting to configure when the program is due. You can leave it as default or choose a fixed date or after a nominal number of days. Follow the same for the program end. Note that "due" is a recommendation to users, whereas "end" refers to when users are stopped from accessing the program.



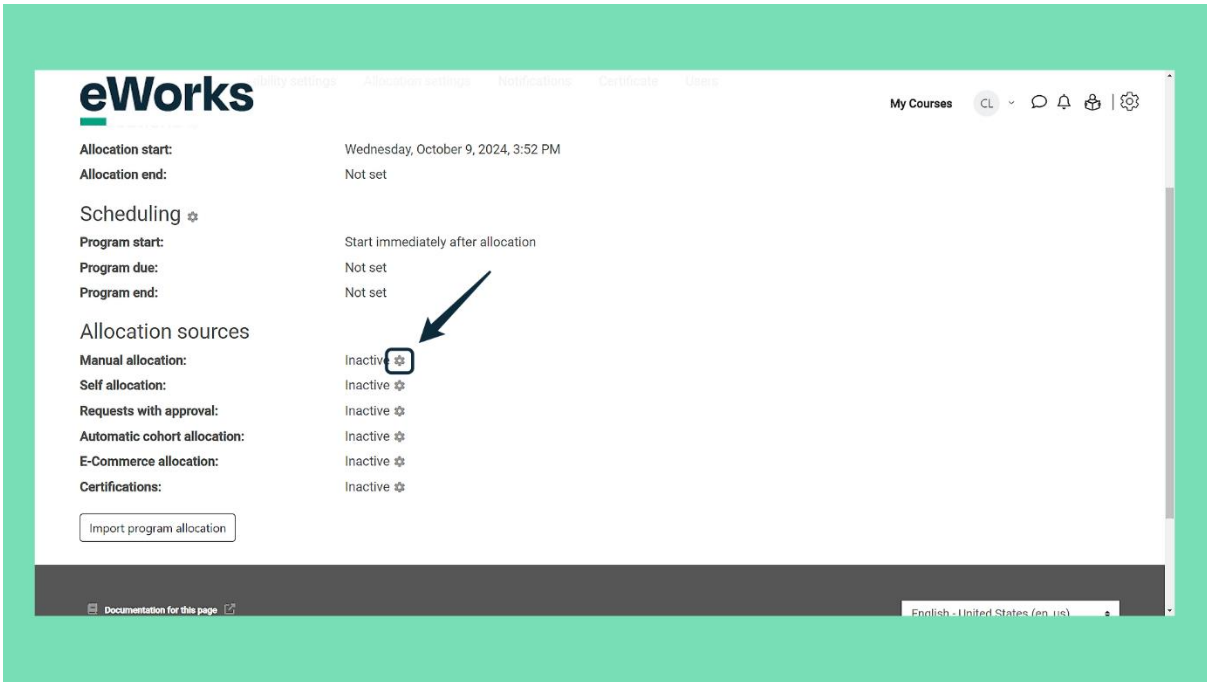
37. Save Scheduling

Click to apply the scheduling changes to the program.



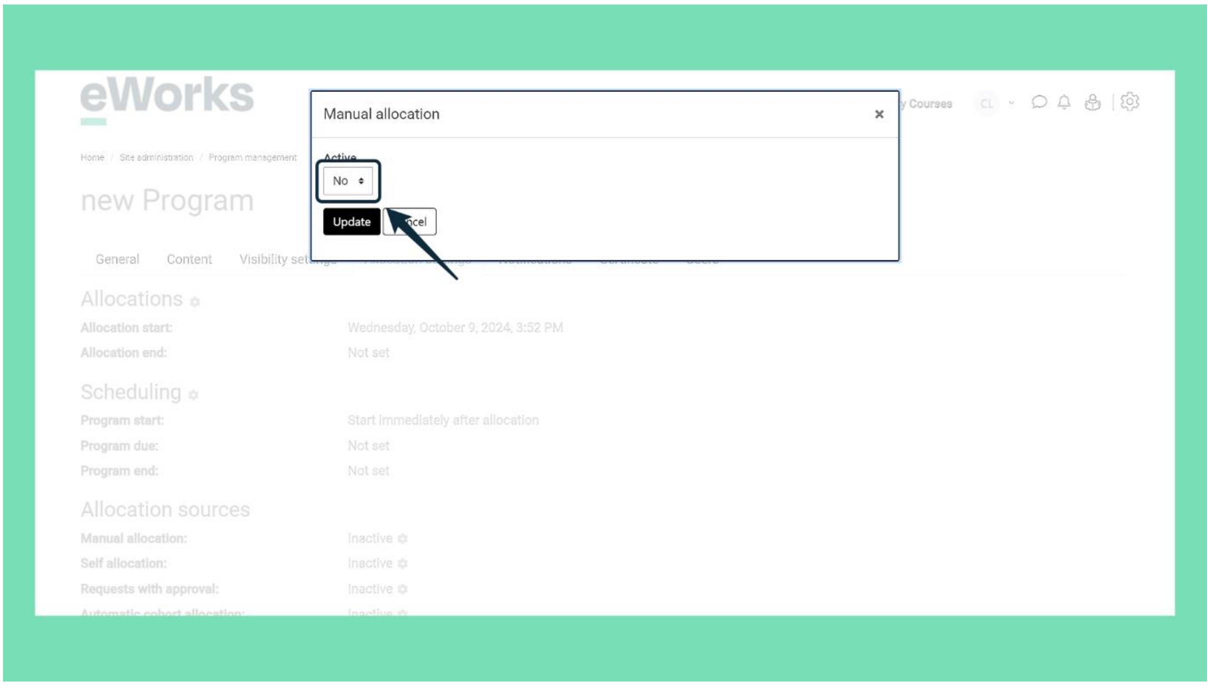
38. Configure Manual Allocation

There are a few options for Allocation sources. Refer to the options on what you would like to set up. Note for e-commerce this requires an extra paid plugin. In this example, we will select Manual allocation first.



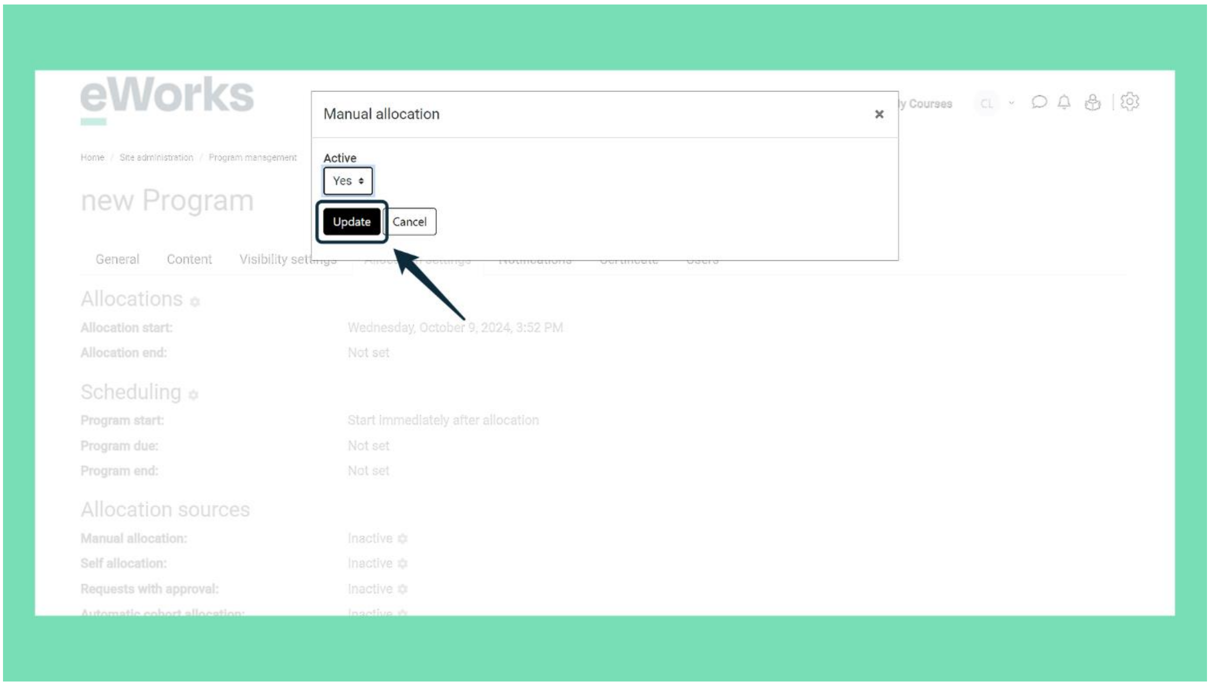
39. Toggle Active Status

Select 'Yes' to set the status.



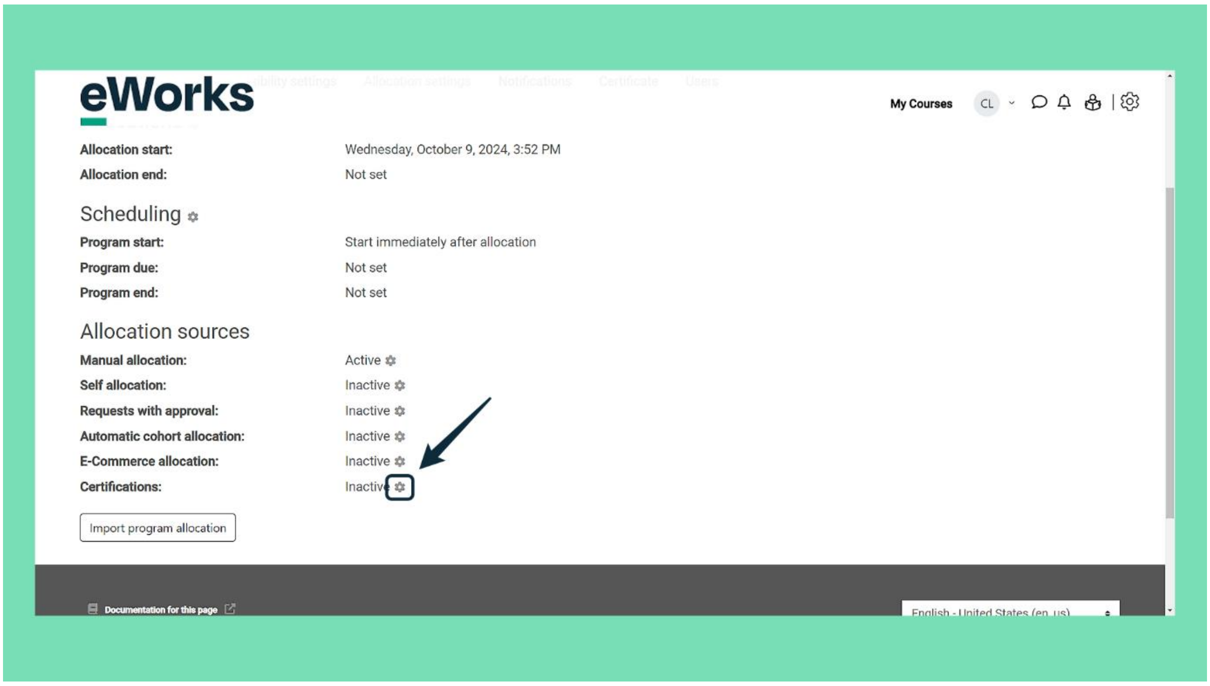
40. Confirmation

Click the update button to save changes.



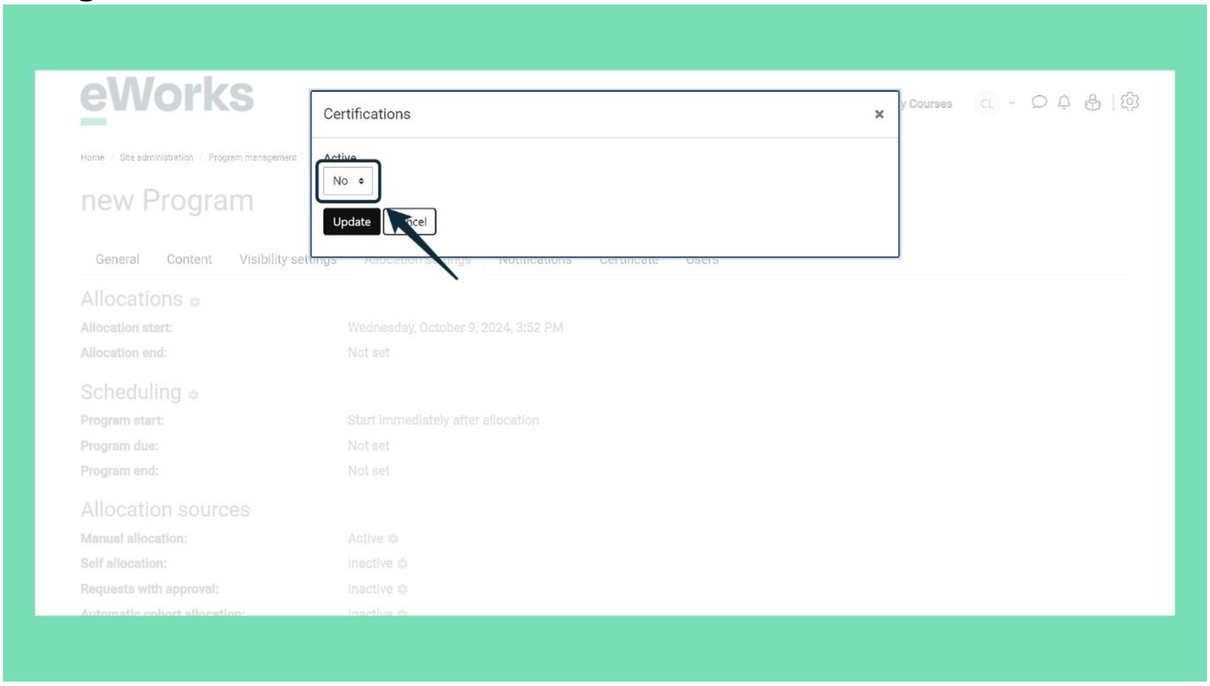
41. Certification Settings

We will now also select Certifications to enable refresher training to be automated in the LMS.



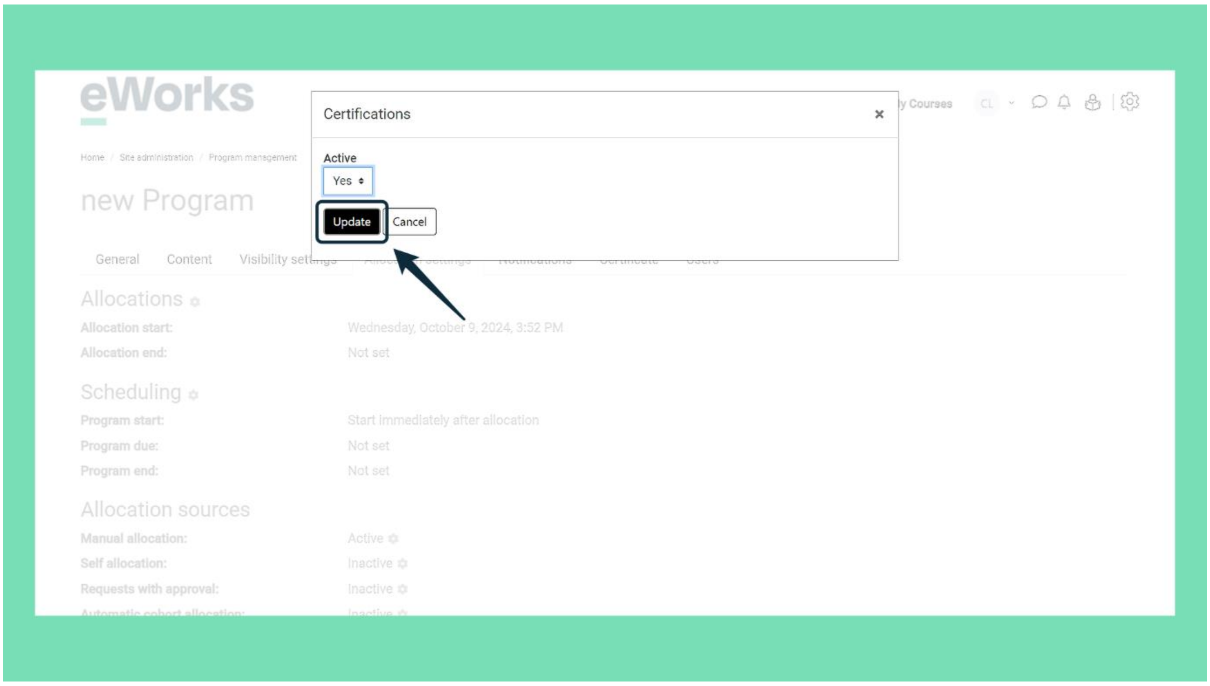
42. Certification Selection

Change the status to Yes.



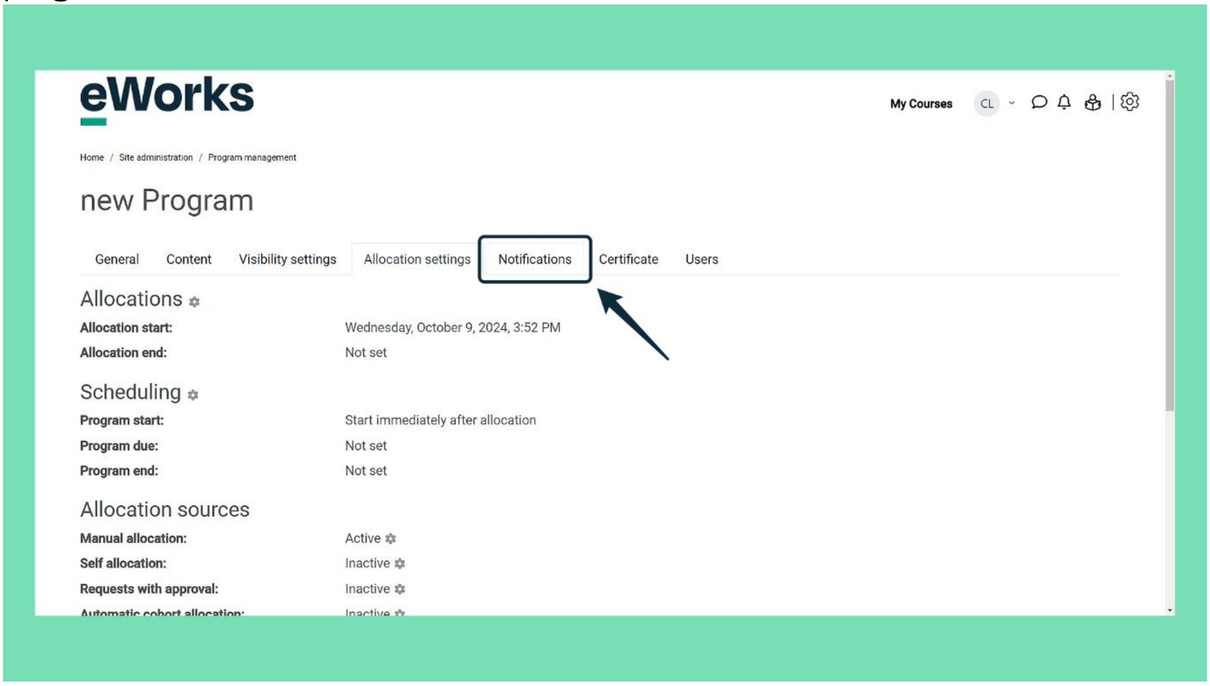
43. Save Certification

Click 'Update' to save changes to the certification status.



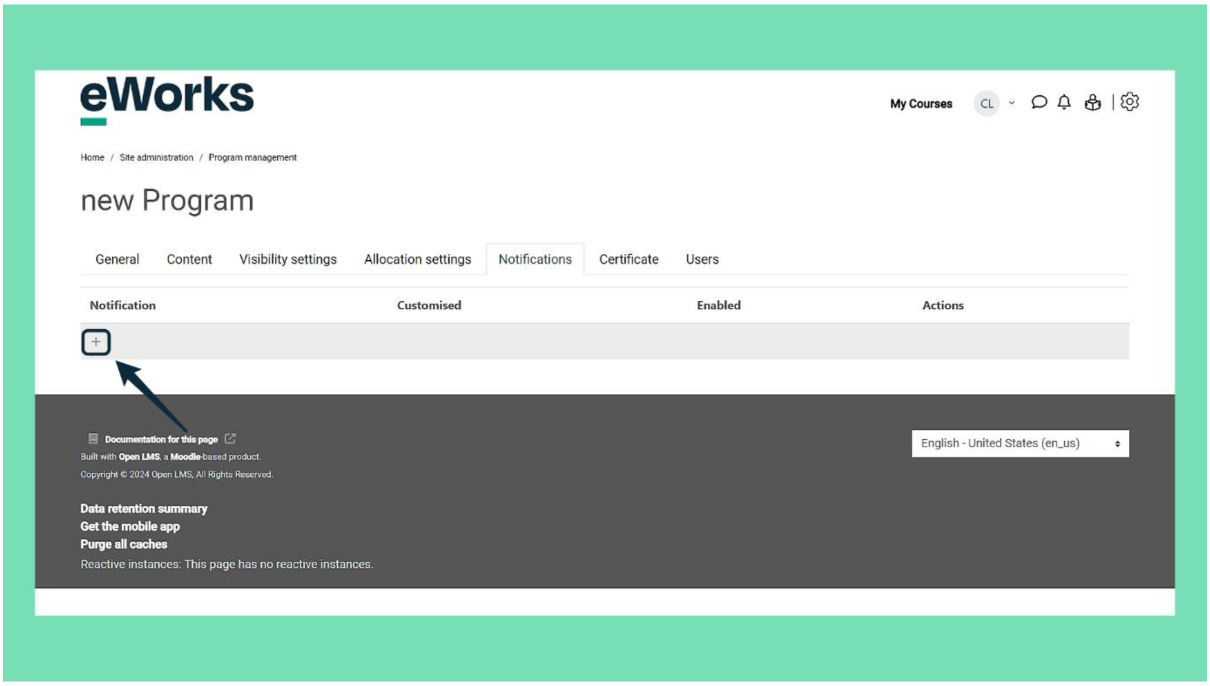
44. Notifications Tab

Click the notifications tab to manage and configure notification settings for the program.



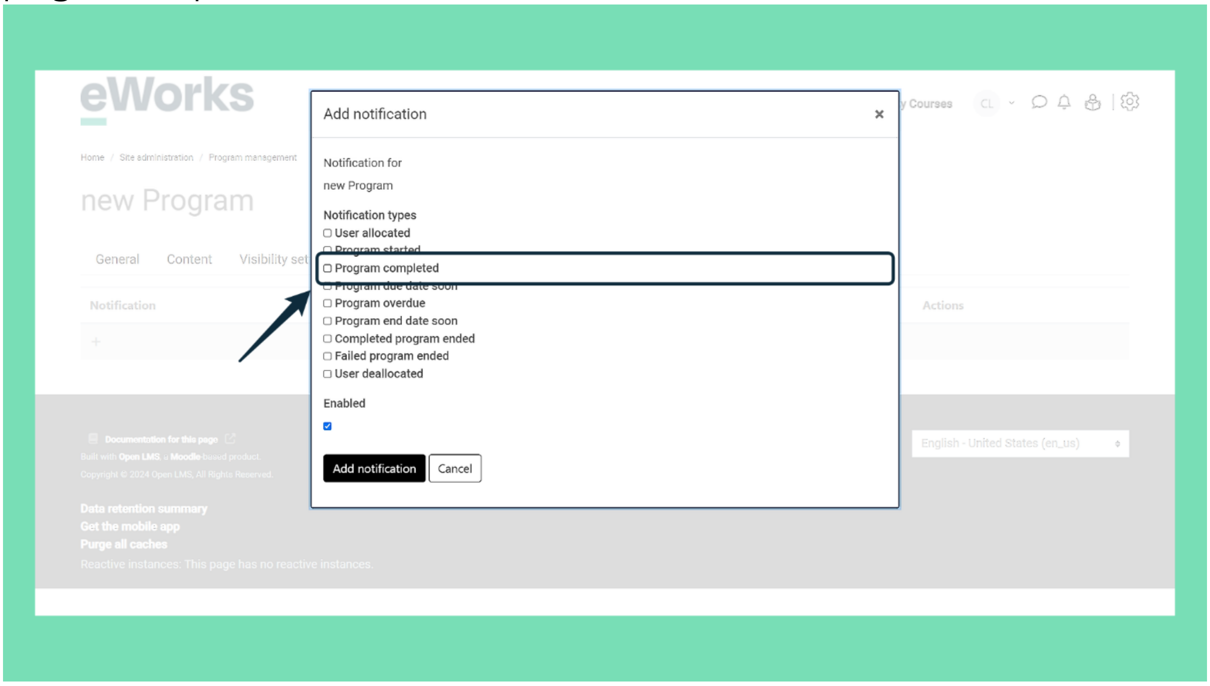
45. Add New Notification

Click the plus icon to add a new notification.



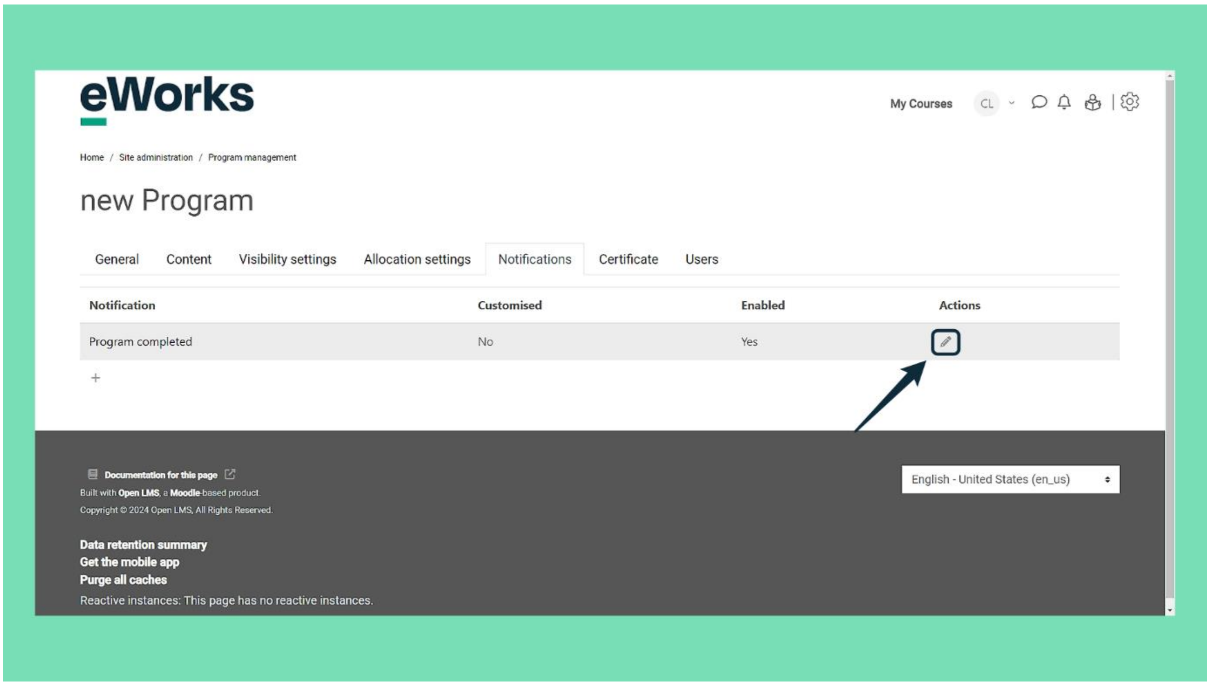
46. Select a Notification

Select the checkbox to turn on the required notifications. In this example, we will turn on program completed.



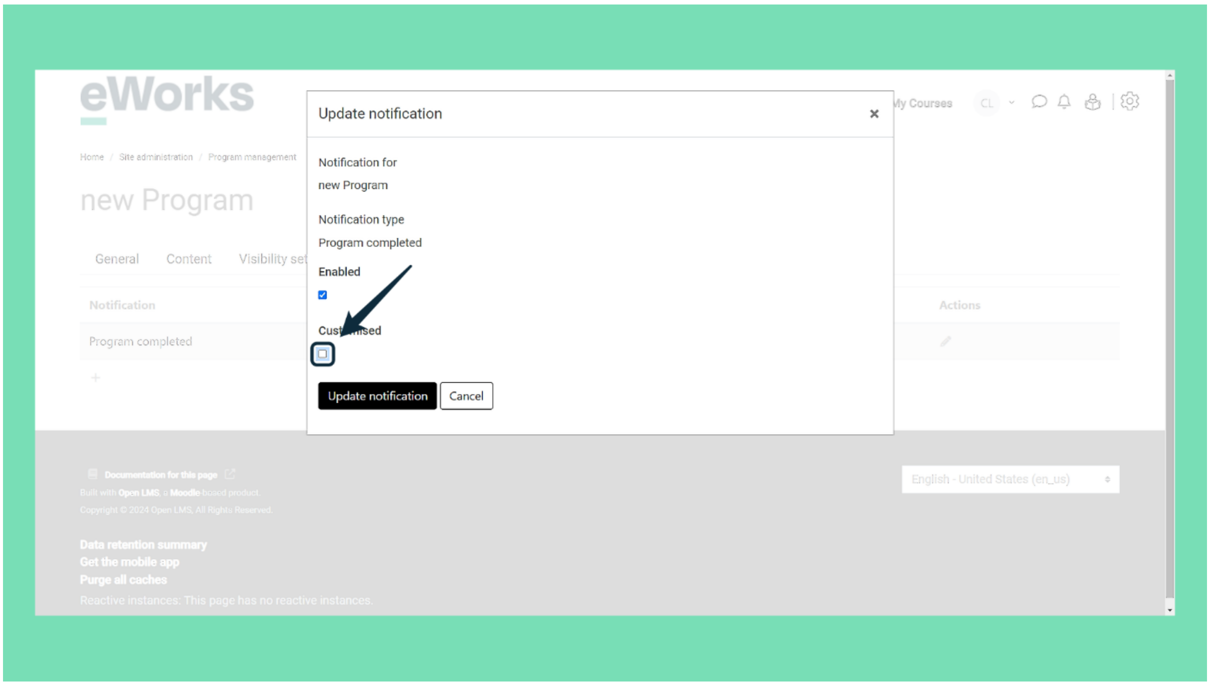
47. Edit Notification

Click the pencil to modify the notification settings for the selected notification.



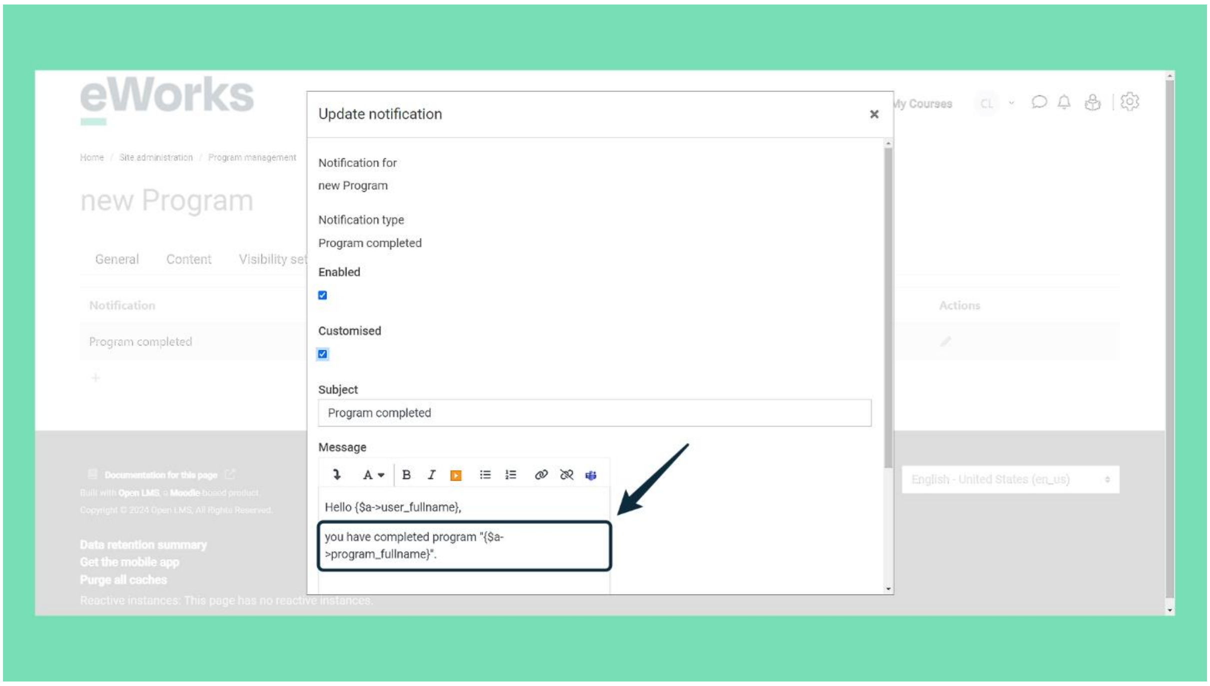
48. Customize Notification

Select the checkbox to customize the notification settings.



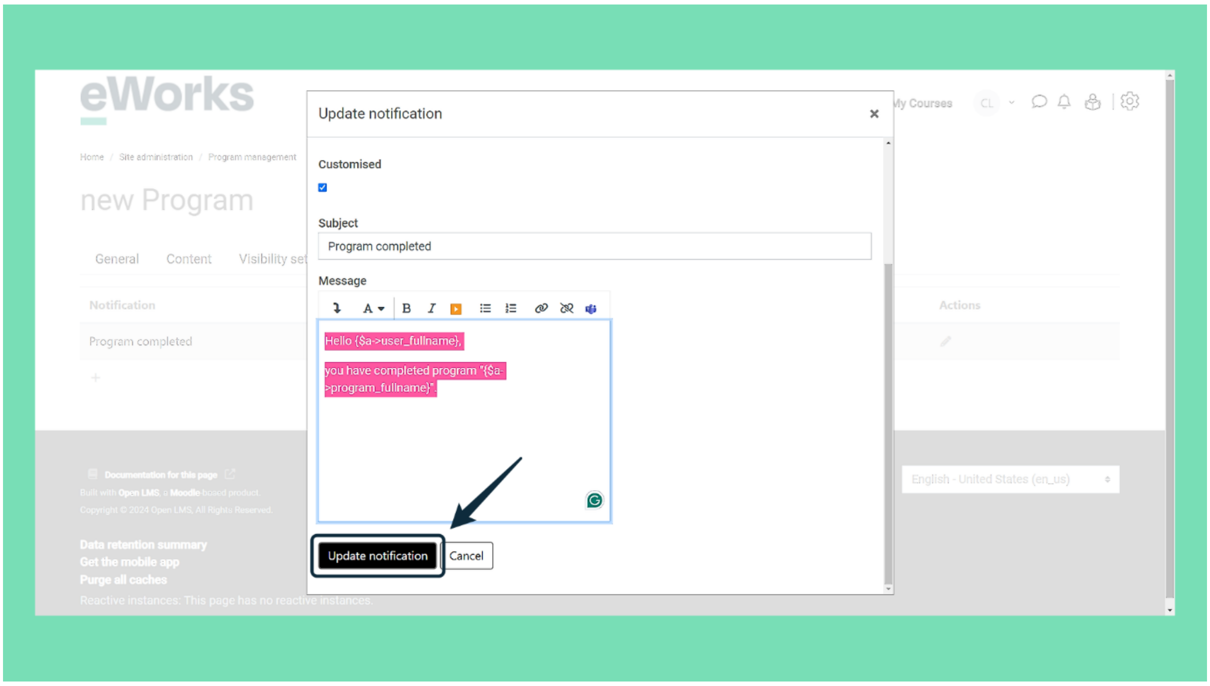
49. Notification Message Editor

Customize the message to inform users about program completion.



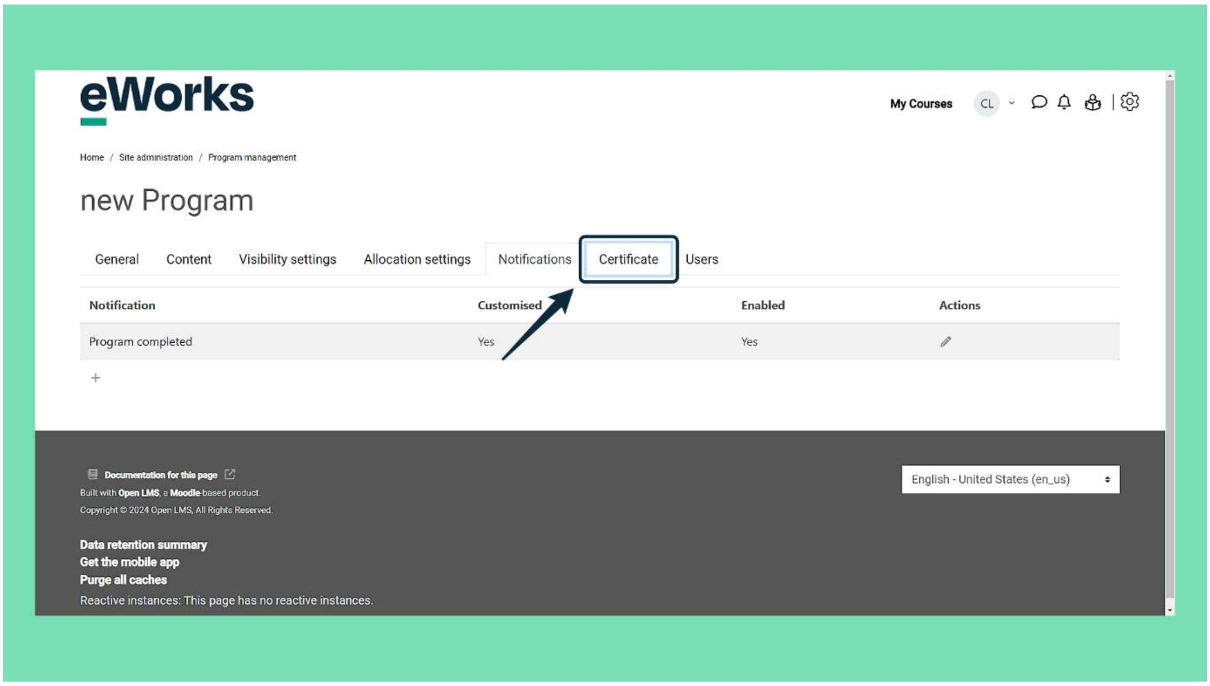
50. Update Notification Button

Click on update notification to save and apply the notification updates.



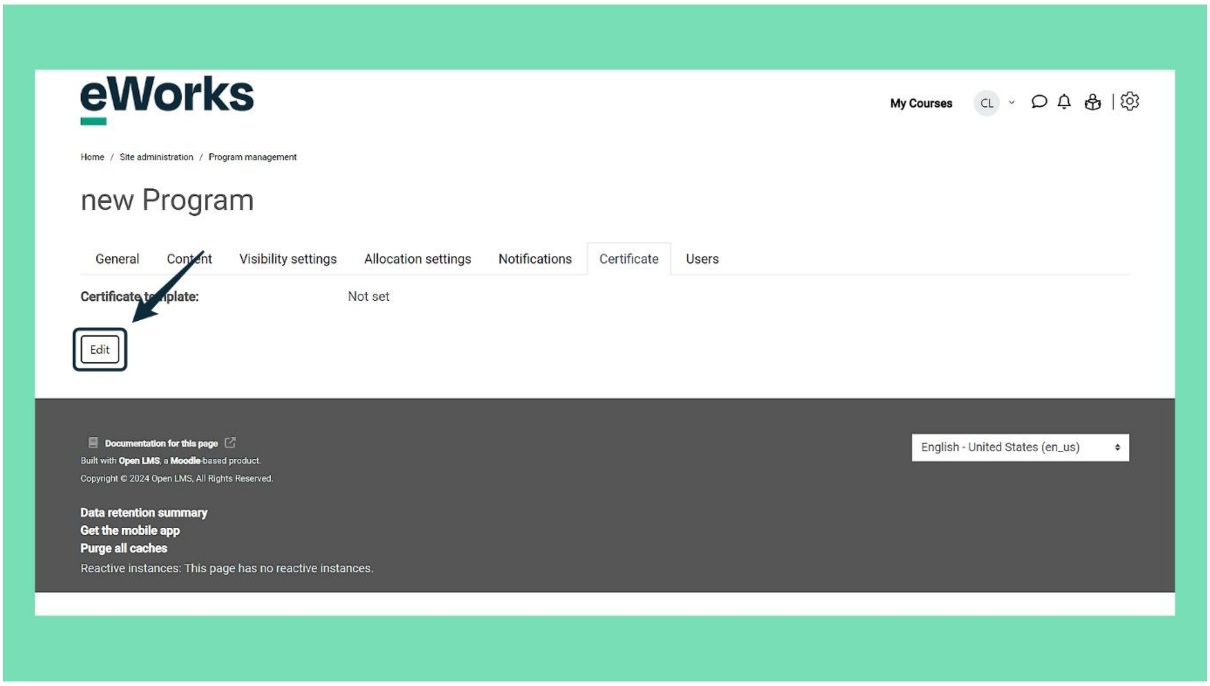
51. Certificate Tab

Select the certificate tab to manage and view certificates for the program.



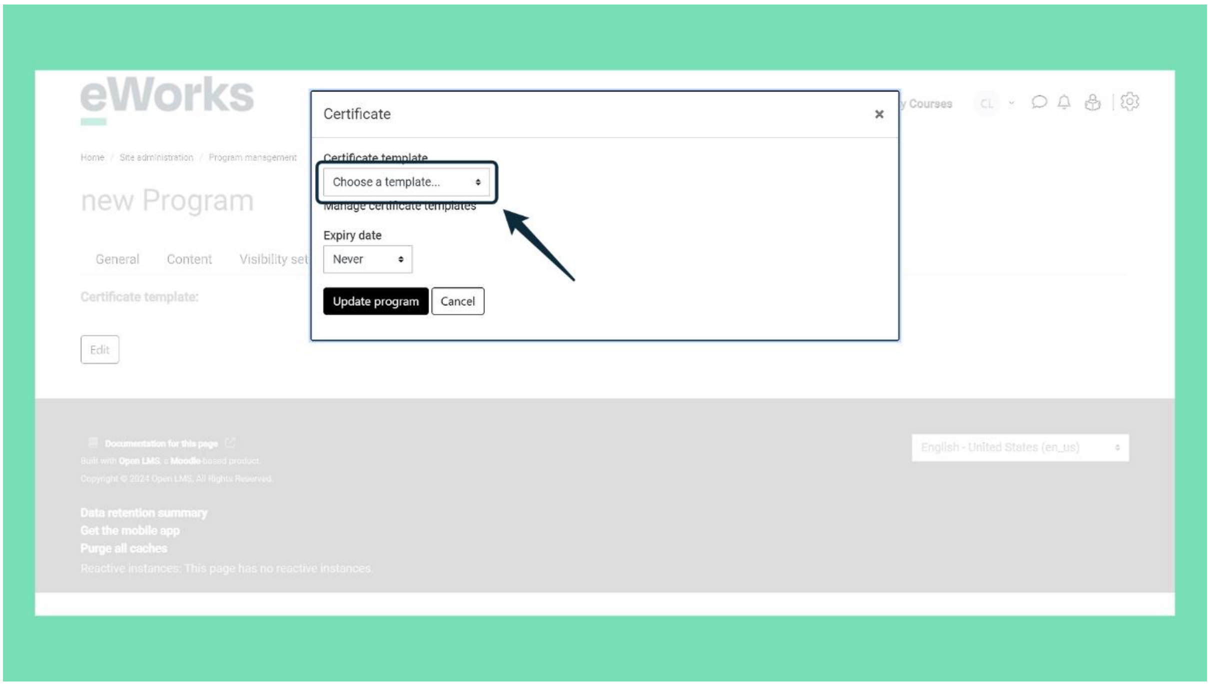
52. Edit certificate

Click to modify the program details.



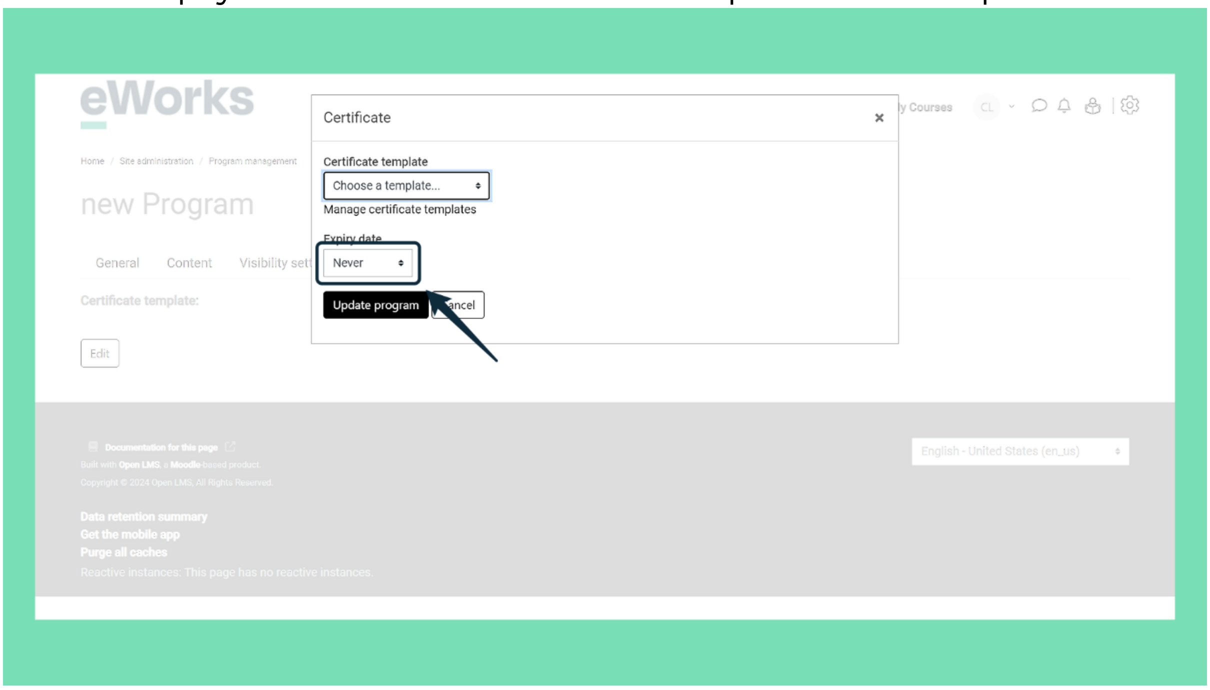
53. Template Selection

If you have previously set up a certificate, select a template from the dropdown menu. If not, select Manage certificate templates to create a new one.



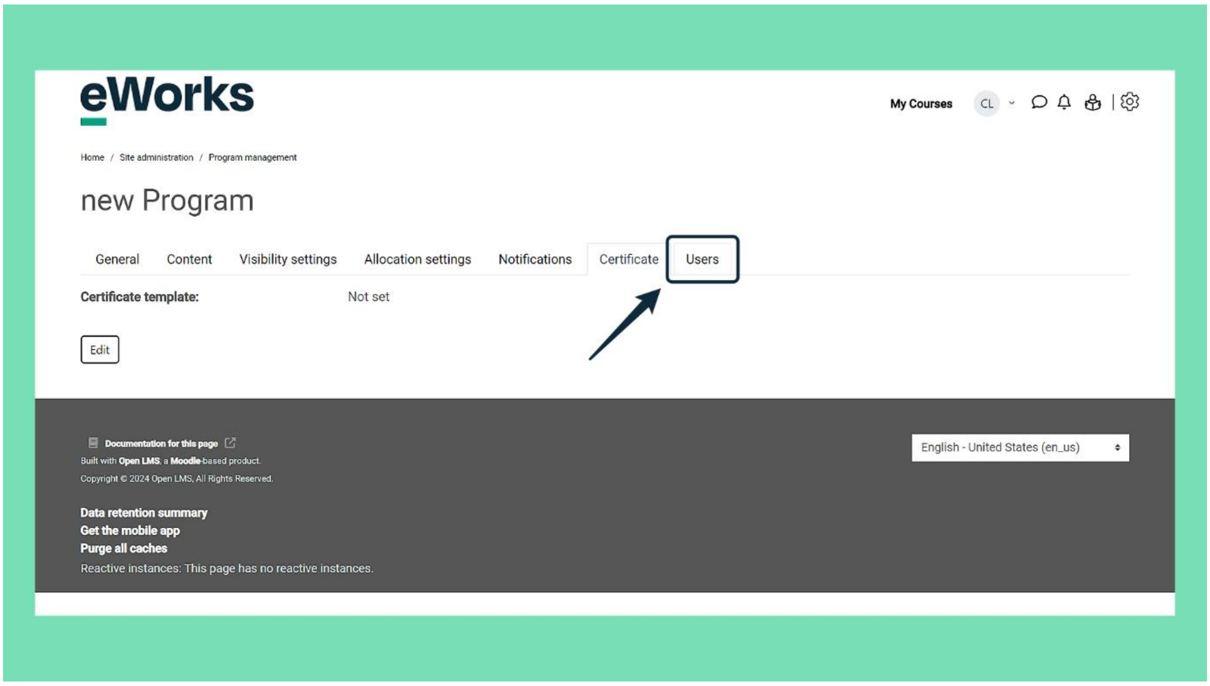
54. Expiry Date

Select the expiry date for the certificate from the dropdown menu. if required.



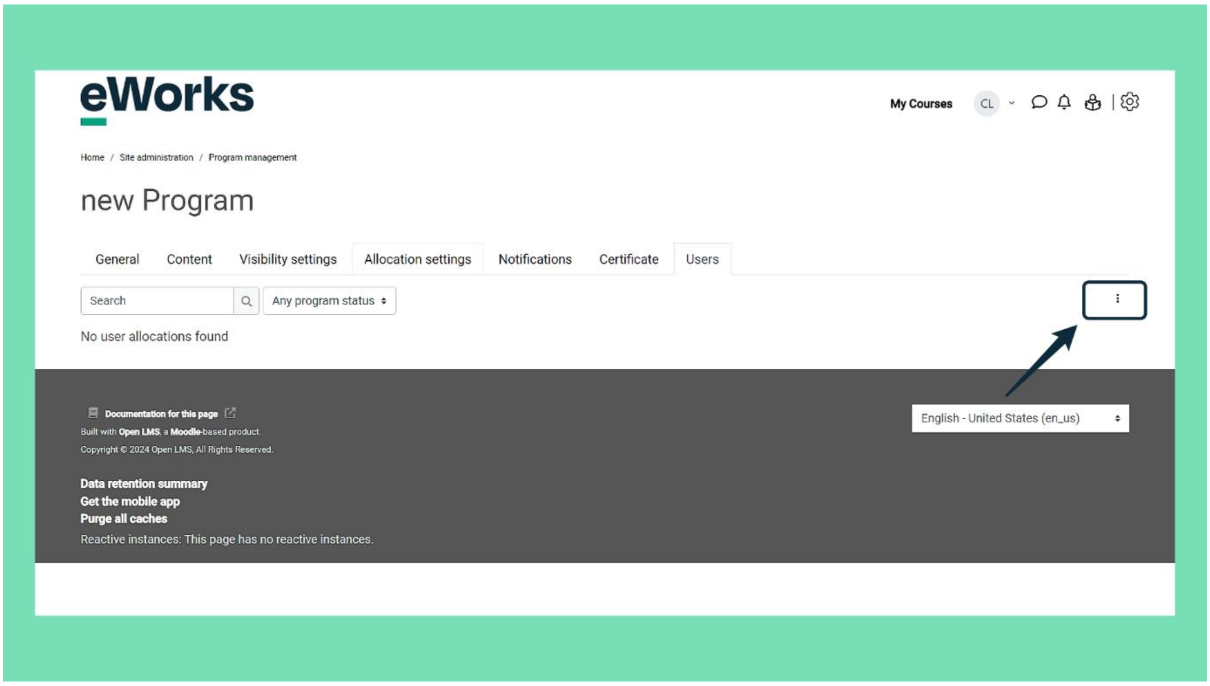
55. Users Tab

Select 'Users' to manage and view user-related settings and options.



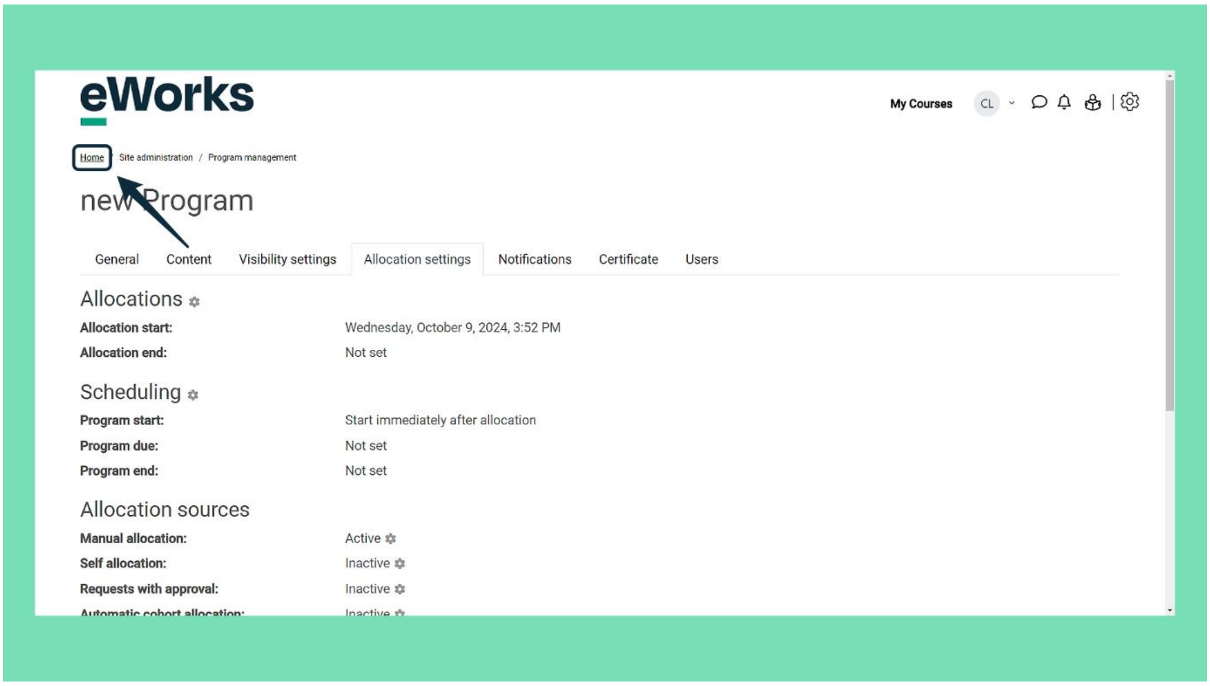
56. Users

On this page, you can easily add users to the program, provided you have set it up for manual allocation. Click on the kebab menu located on the right-hand side to get started.



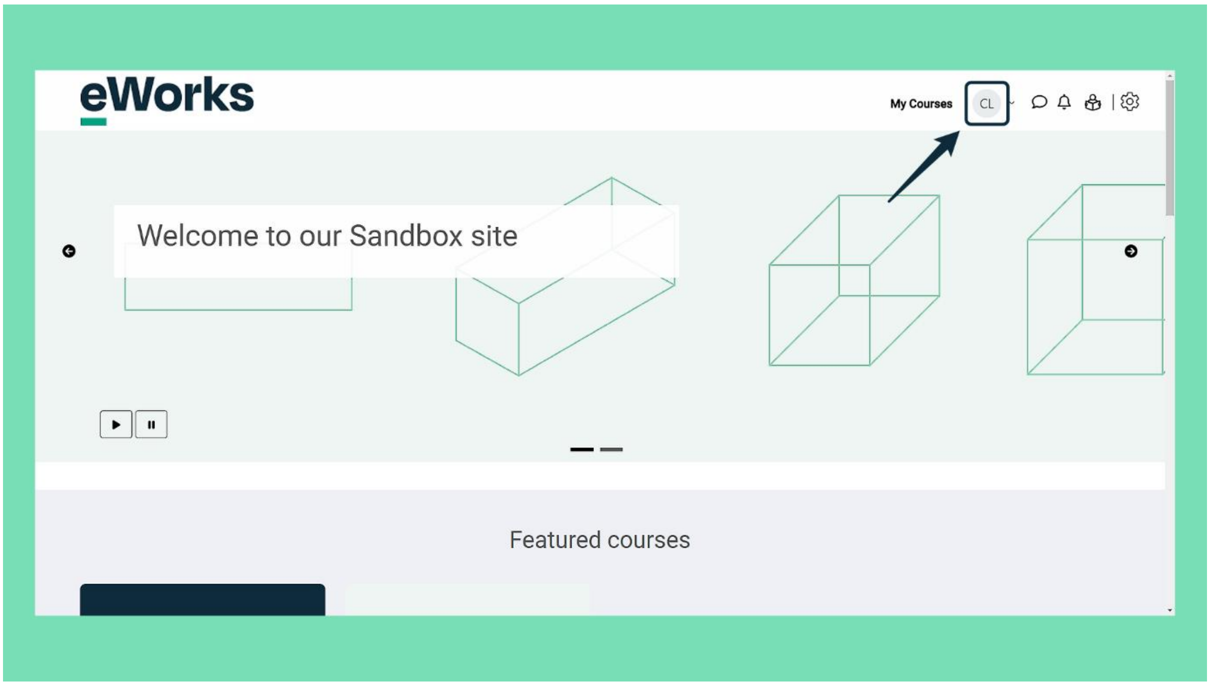
57. Return to Home

The Program is now set up. Let's show you how to access programs as a user. Go back to the home page.



58. User Profile

Click on your initials or profile picture.



59. Accessing the Program Catalogue

Select the 'Program catalogue' option to view all available programs available to you. We hope you found this guide useful. Feel free to reach out to the support team for any queries.