

# Online Learning Getting Started

## The Basics

The Custom Learning Management System (CLMS) is a powerful yet simple-to-use platform to manage your training.

You can:


- Assign online courses and assessments.
- Create custom courses and assessments.
- Add your own online training content and assessment questions in addition to ours.
- View detailed usage reports.
- Download Instructor-led Courseware.
- Promote your Online Learning.

### To Log In:

1. Go to [learn.customguide.com](http://learn.customguide.com)
2. Enter your e-mail address and password.
3. Click **Login**.

Click **Sign In Problems** if you've forgotten your password.

### To Get Help:

Point to the  icon to see a description of any item.

### To Get Additional Help and Support:

Click the **Help & Support** link at the top of the screen.

## Home

(Visible to All Users)

The Home tab is where users go to:

- Take custom online courses and assessments.
- Search for answers to their software questions.
- View and edit announcements.

### To Take a Course

Click the Course you want to take.

### To Search for Topics:

Search lets users find answers to their software questions.

1. Enter several keywords in the **Search** box that describe what you're looking for; try to include the product title (e.g. Excel 2003).
2. Press **<Enter>**.
3. Click the desired topic.

### To Edit an Announcement: (Admin Only)






Click **Edit** and make the desired changes.




## Courses

(Visible to Admins)

The Course tab lets you create, manage, and assign courses and skills assessments. Courses can contain **Assessments**, **Online Tutorials**, and/or **Certifications of Completion**.

### To Create a Custom Course









1. Click the **Course** tab, then the **New** button.
2. Enter a Course Name.
3. Specify what you want to **Include** in the Course. Point to the  icon to see a description of any option.
4. Click the **Content** button.
5. Search for **Courses** or **Lessons** by selecting them from the drop down list.
6. Enter several keywords in the **Search** box (e.g. Excel 2003) and press **<Enter>**.
7. Select the content you want to add:
  - **Existing Courses:** Click the course's  button.
  - **Chapters and Lessons:** Click the desired course then expand or collapse the desired chapter by clicking the  or  icon. Click the  button to assign the chapter(s) or lesson(s).
8. Change the Course outline and content by clicking:

 <b>Remove</b>	Remove a chapter or lesson.
 <b>Move Up</b>	Move a chapter or lesson up one level; click repeatedly as needed.
 <b>Move Down</b>	Move a chapter or lesson down one level; click repeatedly as needed.

9. Click the **Save** button.

## Tabs





Related Online Learning features are organized into tabs. Some of these tabs are only visible to Admins.

 <b>Home</b>	Take courses and assessments, create and view announcements.
 <b>Courses</b>	Create, manage, and assign courses and assessments (only visible to Admins).
 <b>Groups</b>	Use Groups to help manage your users (only visible to Admins).
 <b>Users</b>	Create and manage users (only visible to Admins).
 <b>Courseware</b>	Download printable instructor-led Courseware (only visible to Admins).
 <b>Reports</b>	View detailed usage reports.
 <b>Profile</b>	Make changes to your user account.
 <b>Admin</b>	Promote your Online Learning and make system-wide settings (only visible to Admins).

## Reports

(All Users)

Reports let you view learning progress, learning, and growth. Here are the available reports:

 <b>Courses</b>	Admins Only
Summary	Global use for all courses and titles.
Details	Detailed usage for a course.
List	A list of all courses and titles.
 <b>Groups</b>	Admins Only
User Details	View group usage by users.
Course Details	Group usage for assigned courses and titles.
List	A list of all groups.
 <b>Users</b>	Admins Only
Summary	Global use for all users.
Details	Detailed use for a user.
List	A list of all users.
 <b>Self Progress</b>	All Users
	Track your course and title progress.

### To View a Report:

1. Click the **Report Name**.
2. If prompted, enter the following information:
  - **Summary:** **From** and **To** dates. Leave these fields blank to display all information.
  - **Details:** Click **Select**, enter part of the name you're looking for and click **Search**.
3. Select the desired report output:
  - **Screen:** Displays the report onscreen.
  - **Excel Spreadsheet:** Download to a spreadsheet.
4. Click the **View Report**.

Click an item in summary reports to display detailed information.

### To Download a Certificate of Completion:

Users can download once they've completed a Course. Right-click the certificate you want download and select **Save Target As**.

## Users

(Admins Only)

### To Search for a User:

Enter part of the User name and click **Search**. Clicking **Search** without any search terms will display all objects.

### To Edit a User:

Click **Edit** next to the user you want to change.

### To Create a New User:

Click the **New** button and enter the user information.

### To Mass Add Users:

1. Click the **Users** tab and click **Mass Upload**.
2. Click the **Sample File** link.
3. Download the sample CSV file and open it in Microsoft Excel.
4. Enter the user information and save the file.
5. Click **Browse** and select the Sample file.
6. (Optional) Check **Send an email notification** to notify the users of their new account.
7. Click **Map Groups**.
8. Select any groups you want to add the users to.
9. Click **Upload Users**.

## Groups

(Admins Only)

You can assign specific courses to users that will appear in the **My Courses** section of the Home Page by adding the Users to a Group.

### To Search for a Group:

Enter part of the Group name and click **Search**. Clicking **Search** without any search terms will display all Groups.

### To Edit a User:

Click **Edit** next to the user you want to change.

### To Create a Group:

1. Click the **Groups** tab and click **New**.
2. Complete the **Properties**, **Members**, and **Courses** sections.

## Admin

(Admin Only)

### Information

Displays information about your Online Learning account.

### Promote

The Promotion Toolkit provides you with pre-made promotional pieces and deployment tools.

### Brand

The Brand section lets you add your organization's logo to your Online Learning for an in-house look and feel.

## Courseware

(Admins Only)

The Courseware tab lets you download printable instructor-led handouts.

### To Download Courseware Files:

1. Enter part of the courseware name and click **Search**.
2. Click the Courseware title you want to download and save it to your computer.