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Hello and welcome to Learn-Wise!

This Administrator’s Manual will help you navigate through the processes that you will need to perform as a client administrator. Step-by-step screenshots and tutorials are provided for procedures such as adding new accounts, creating reading material, assigning training modules, and so on. You can find a brief synopsis of each section on its respective first page, as well as helpful notes and tips in the margins. IT-related information and FAQs can be found at the beginning and end of the manual respectively.

We understand that working through the system on your own may be a bit of a challenge those first few tries. That’s why your Account Representative is always on standby in case you have questions, need advice, or just want someone there to cheer you on for moral support. Please feel free to contact your designated Learn-Wise team member if you have any questions or concerns, and they will be more than happy to help you out.

Good luck, and we look forward to working with you!

The Learn-Wise Team

Logging In
When accounts are created in the system, two system emails are automatically sent, one with username information and one with password information. The first time you log in with your temporary password, you will be prompted to change your password.

![Change Password](image)
LW Browser Compatibility

Browser Support

The following browsers are supported by LW:

- Internet Explorer v9, 10, 11
- Firefox
- Chrome
- Safari v6, 7, 8
- iPad iOS7, 8

Prerequisites (Disabling Pop-Up Blocker, Whitelisting, etc.)

These filter settings ensure that your users are able to receive all their Learn-Wise system messages.

Steps for your IT Department:

In order for our email systems from Learn-Wise to successfully send emails out on behalf of your sub-domain, we have a few requests:

- We would highly recommend adding the IP Address **142.54.229.112** to your email server SPF record.
- Add **smtp.zerolag.com** to your whitelist on your filtering facilities. This will prevent your system from flagging us as an offending mail server, and it will guarantee that the generated emails will not be filtered into the “spam” folder.

The reason for these requests is that we do not host the DNS for each client domain, so we will not be able to do this on your behalf. Therefore, we require this to be done by your IT department or web hosting facility.
The Accounts Section allows the Client Administrator to create User accounts, organize and categorize User information, grant or decline access to the website, and update or modify Users' profiles.

**Access to Accounts**

To access the Accounts subcategories, click the Accounts menu item.

The Accounts sub-categories are:

- **Sub-Administrators**
  - Accounts for those that will help you manage the site.

- **Users**
  - Adding/importing/editing your User accounts.

- **User Types**
  - Adding/editing your User categories.

- **Companies**
  - Adding/editing your User companies.

- **My Profile**
  - Editing your profile.

- **Groups**
  - Managing your Groups.

- **Locked Users**
  - Managing your Locked Users.
There are three types of User accounts: Client Administrator, Sub-Administrator and User.

Before we start creating Users, let's go over a few components that will be helpful when searching for data through the site.

There are different search filters that can be used either alone or in combination to customize a search. You can search by name, creation date, state, etc. After you have selected the appropriate field, click on the Search button. You can always clear and reset the field, by clicking on Reset button.

When encountering pages that have the printer or the Excel icon you will be able to print the information on the page or export data to your computer.

Another handy feature that you will find is the ability to sort your information when you click on the column titles.

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>User Name</th>
<th>Email Address</th>
<th>Account</th>
<th>Status</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
</table>

Notes and Tips

- The system defaults to showing only Active accounts. You must search for Inactive accounts.
- When using the Print feature, confirm that the Pop-Up blockers on your computer are turned off.
Sub-Administrators

To access the Sub-Administrators page, click on the menu item.

To add a new Sub-Administrator, click “(+) Add Sub-Administrator”.

Enter the Login Details and General Information for the new Sub-Administrator. Also, you will be able to assign Privileges (see guide for descriptions) to parts of the site you’d like them to be able to access. Click on the Save button at the bottom of your screen.
After saving, you will go back to the Sub-Administrator page. You can click the Green status button to deactivate the account. The Sub-Administrator will no longer be able to log in. Click the Edit icon to edit the account. You can also delete the account by clicking the Delete icon.

Notes and Tips

- Sub-Administrators cannot create other Sub-Administrators.
- The system has a 1:1 e-mail to login ratio. Each account must have a unique e-mail address and username.
- Sub-Admin accounts can be deleted at all times, even if the Sub Admin has logged into the Site.
<table>
<thead>
<tr>
<th>Privilege</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Type Management</td>
<td>Allows Sub-Admin to access/add/edit Company Types on the site.</td>
</tr>
<tr>
<td>Company Management</td>
<td>Allows Sub-Admin to add new Companies and edit details of existing Companies.</td>
</tr>
<tr>
<td>User Management</td>
<td>Allows Sub-Admin to access, add, import, and edit Users; access, add, and edit User Types; and access, add, and edit Professional Titles.</td>
</tr>
<tr>
<td>Video</td>
<td>Allows Sub-Admin to access, add, and edit videos in the Video library.</td>
</tr>
<tr>
<td>Image</td>
<td>Allows Sub-Admin to access, add, and edit images in Image library.</td>
</tr>
<tr>
<td>Content</td>
<td>Allows Sub-Admin to create and publish Content into the Library.</td>
</tr>
<tr>
<td>Messages</td>
<td>Allows Sub-Admin to create and send messages to the Users/Trainees via access to the User Message Templates.</td>
</tr>
<tr>
<td>Reports</td>
<td>Allows Sub-Admin to access all Reports and use filters to customize the Reports.</td>
</tr>
<tr>
<td>Email Template</td>
<td>Allows Sub-Admin to access and edit the Email Templates that are automatically sent out by the system (changed passwords, new accounts, completed courses, etc.). Note: not all the templates that are available to the Client Admin are available to Sub-Admins.</td>
</tr>
<tr>
<td>Secret Questions</td>
<td>Allows Sub-Admin to add or delete Secret Questions that the User/Trainee needs to answer for password recovery.</td>
</tr>
<tr>
<td>Multimedia Room</td>
<td>Allows Sub-Admin to activate, deactivate, and rearrange the published videos in the Multimedia Room on the User’s/Trainee’s homepage dashboard.</td>
</tr>
<tr>
<td>Logo Management</td>
<td>Allows Sub-Admin to access, add, and delete logos under Logo Management. The Sub-Admin can set the logo which will be displayed in User’s homepage, as well as the logo displayed on the Admin page.</td>
</tr>
<tr>
<td>LMS</td>
<td>Allows Sub-Admin to access the LMS; look at Trainee details; add and edit Groups; create Training Modules; add and edit Training Module Completion Certificates; and assign Modules to Trainees and Groups.</td>
</tr>
<tr>
<td>Supplement Files</td>
<td>Allows Sub-Admin to access, add, and edit Supplement Files (Microsoft Office Files, .zip, .PDF, .htm, .html, .swf, or .flv).</td>
</tr>
<tr>
<td>Client Custom Calendar</td>
<td>Allows Sub-Admin to access the Calendar on the website to create events and notify the Users/Trainees.</td>
</tr>
</tbody>
</table>
To access the Users page, click on the menu item.

Users can be added individually or imported via spreadsheet.

**Adding a User Individually**

To add a new User, click on the “(+) Add User”.
On this page, enter the Login Details and General Information for the new User. You will need to select or add a User Type and a Company as well, which we will discuss later in the manual. Once you have all this information, you have the option of setting an expiration date in the Account Expiry Date box, which prevents a user from accessing the site after that date. The Status selection will allow you to create an Active or Inactive type account. An Inactive User will not receive access to Learn-Wise or any notifications from the system until you activate their account. Click on the Save button at the bottom of your screen.

Notes and Tips

- When a User account is created, the system automatically generates an e-mail to that User notifying them of their account creation and login credentials. This e-mail can be edited in Communications > E-mail Templates > Create User.
- Once an account is created, all information tied to that account can be edited EXCEPT the username.
- You can also access the Accounts > Users section from the Drop down menu across the top of the page.
Importing Users

To Import Users click “(+ Import Users”).

On this page click “Template”.

Open the spreadsheet saved on your desktop. It is populated with demo Users to show you how it should appear when ready for import. Clear the sheet, leaving only the headers, and fill in the columns (red columns are required). The User Type, Company, Company Type, and Group information must already be stored in the system.

<table>
<thead>
<tr>
<th>Username</th>
<th>UserType</th>
<th>FirstName</th>
<th>LastName</th>
<th>HomePhone</th>
<th>Mobile</th>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>ksmith</td>
<td>Independent Distributor</td>
<td>Keith</td>
<td>Smith</td>
<td>2113217100</td>
<td>9879230111</td>
<td><a href="mailto:ksmith@belville.com">ksmith@belville.com</a></td>
</tr>
<tr>
<td>syoung</td>
<td>Direct Sales</td>
<td>Steve</td>
<td>Young</td>
<td>2113217101</td>
<td>9879230112</td>
<td><a href="mailto:syoung@pacificorthopedics.com">syoung@pacificorthopedics.com</a></td>
</tr>
</tbody>
</table>

Once you have completed the spreadsheet, save and close it. Click the Choose File button and select the spreadsheet you just updated. On Select Import Type, select "With Header" and click the Import button.
Scroll down and make sure the two columns match, then click the Submit button. Any errors will be displayed at the top of the page, and all users will be imported with the exception of users with errors (errors will be explained in the error message).

After you submit, you will go back to the Users page. You can activate, deactivate, edit or delete the new User.

Notes and Tips

- Once a User has logged in to the site, you will no longer be able to delete them.
- You can reset a user’s password for them by clicking the Edit icon, then checking the box for Reset Password and clicking Save at the bottom of the page.
User Types

The purpose of User Types are to categorize Users for administrative purposes. Put some thought into your User Types and determine them by how you plan to send out messages/search report data, etc. You can also assign certain privileges for each User Type.

To access the User Type page, click on the menu item.

![Menu Item](image)

To add a new User type, click “(+) Add User Type”.

![Add User Type](image)

Fill the User Type box and select the functionalities in the Assign Privileges section, then click on the Save button.
After you save, you will go back to the User Type page. You can click active, deactivate, edit or delete the new User Type.

Guide to User Type Privileges

<table>
<thead>
<tr>
<th>Privilege</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Certificate Tool</td>
<td>Allows this User Type to receive an e-signature with its certificate.</td>
</tr>
<tr>
<td>Attempt Knowledge Check</td>
<td>Allows the User Type to have access to Knowledge Check.</td>
</tr>
<tr>
<td>LMS</td>
<td>Allows the User Type to access LMS content.</td>
</tr>
</tbody>
</table>
This is another helpful way of categorizing your users. You can establish Company Types (internal, indirect representatives, etc.) and then create Companies within those types (your company, contracted companies, etc.). Fleshing this area out will enhance your reports.

To access the Companies page, click on the menu item.

This page contains two tabs, one for Company Type and Companies. To create a Company Type, just fill the Company Type box. Click the Save button.

After you click save, the new Company Type will be added to the list and once again, you will be able to edit or delete this new Company Type.
To create a new company, click the Company tab, then click Add Company

On this page, enter the Company name, select or create a Company Type and all the information available. Click on the Save button at the bottom of your screen.
After you click save, the new Company will be added to the list and you have the ability to active, deactivate, edit or delete the new Company.

**My Profile**

In this section you will find all the information about the Client Administrator. You will be able to edit or update your password and other information.

To access the Groups page, click on the Groups menu item.
An easy way to assign your Training Modules is to use Groups and Sub-Groups. Put a lot of thought in how you will structure this area. To create a new group, click "(+ Create Group.)"

To create the new group, enter the information in the mandatory fields. If desired, you can add Sub-Groups; when you are done, click Save.

To add Training Modules and Assign Trainees to your groups, select the "Sub-Group" link.

On this page, you can add a new Sub-Group by clicking "(+ Create SubGroup)." Selecting the "Training Modules link will bring you to a new page where you can assign Training Modules to a Sub-Group by clicking on "(+ Assign Training Module)." You can select all or individual modules; once selected, press the Assign button, and the Trainee(s) will then have access to those modules.
To assign Trainees, select the Trainee link, then click on the (+) Assign Trainees. Remember you can edit, deactivate or delete a Group.

<table>
<thead>
<tr>
<th>Sub Group</th>
<th>Date</th>
<th>Lesson Plan</th>
<th>Training Module</th>
<th>Trainee</th>
<th>Edit</th>
<th>Status</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quarter 2</td>
<td>June 09, 2015</td>
<td>Lesson Plans</td>
<td>Training Modules</td>
<td>Trainees</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quarter 1</td>
<td>June 09, 2015</td>
<td>Lesson Plans</td>
<td>Training Modules</td>
<td>Trainees</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Title</th>
<th>Start Date</th>
<th>End Date</th>
<th>Duration</th>
<th>Status</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Neptune Demo</td>
<td>June 30, 2015</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sample</td>
<td>June 09, 2015</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Notes and Tips

- Trainees can belong to an unlimited number of Groups/Sub-Groups.
- Any modules assigned to a Sub-Group will automatically be assigned to all Trainees in that Sub-Group.
- Any Trainees assigned to a Sub-Group will automatically be assigned all Training Modules assigned to that Sub-Group.

Locked Users

To access this section, click on the menu item.

This section will contain any users that have been locked out of their account due to exceeding the allowed number of login attempts. You can set these settings in Admin > Account Security Configuration.

To unlock a locked user, click the Unlock button.
Publishing

Access to Publishing

To access the Publishing subcategories, click the Publishing menu item.

The Publishing subcategories are:

- **Content**
  - Draft and distribute your materials to users.

- **Videos**
  - Upload videos to be inserted into Media Boxes.

- **Supplement Files**
  - Upload document files such as PDFs, PPTs, Excels, Word Docs, Articulate files, etc.

- **Images**
  - Upload images to be inserted into Media Boxes.

- **Knowledge Checks**
  - Create checkpoint questions about your content.

- **Multimedia Room**
  - Sequence the videos that appear on the User homepage. Videos must be published in Content in order to appear in the Multimedia Room.

Consider the Videos, Supplement Files and Images tabs as your material drawers. You can upload the materials into these areas for later use, but they must be published in content in order to be visible to the User.
Pre-Publishing Pep Talk

There is a learning curve. Be patient with yourself. Give your formatting a lot of thought. Do you want to have your content organized by product line? By region? By diagnosis? Determining your structure before you begin uploading eliminates quite a bit of frustration right out the gate.

You are creating a library. Content is like genres: once a book is in non-fiction, it is stuck in non-fiction. Topics are like the books themselves, they can be shuffled around on the non-fiction shelf at will.

Content Structure

The Content Title serves to categorize your materials; this is the “genre” marker in your library. Think about a Content Title as a folder that will host all the information about a certain subject. To draw an easy comparison, let’s call this Content Title our "Fiction" section in the library.

In Learn-Wise, Content can be organized in three additional levels. Parent Topics, Topics and Pages. Think about these as continual levels of subfolders underneath your Content Titles. If we go with our bookshelf metaphor, a Parent Topic may be a book in the Fiction section—say "Harry Potter". A regular Topic would be a chapter of the book ("The Boy Who Lived"), and a Page would be a page in the chapter.

Once a Topic is underneath a Content Title, it cannot be moved to another. You can see an image of how these tiers are structured below.

Pages are the bottom-most level of the Content, and they can be added to Topics. However, they will automatically reflect the name of their Topic ("The Boy Who Lived (1 of 3)”) and cannot be moved from underneath their Topic.
<table>
<thead>
<tr>
<th>Content Titles</th>
<th>Fiction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent Topic</td>
<td>Harry Potter</td>
</tr>
<tr>
<td>Topic</td>
<td>The Boy Who Lived</td>
</tr>
<tr>
<td>Pages</td>
<td>The Boy Who Lived (1 of 3)</td>
</tr>
<tr>
<td></td>
<td>The Boy Who Lived (2 of 3)</td>
</tr>
<tr>
<td></td>
<td>The Boy Who Lived (3 of 3)</td>
</tr>
</tbody>
</table>
To access the Content page, click on the menu item.

To add a new Content Title, click on “(+ Add Content”). This will bring you to the Add Content page.

Enter the Title for your content; if you would like to, you can also attach an image to your content by clicking on the Choose File button. Next, you will be able to assign your content to your users by selecting either Assign to All or Assign through Groups and Trainees (we will discuss these two categories later).

By selecting Assign to All, your content can be accessed by everyone on the site. You also have a choice to assign specific content to select users and groups, then you will select the Assign through Groups and Trainees. Click on the Save button.
On the Content home page, the new Content Title gets pushed down to the bottom of the list of titles by default. To move your Content Title to the top select "Set Sequence". Select your new Content Title and drag it to the top spot. Click the Apply button ( ). To go back to the Content home page, select "Content" at the top left corner.
Now we can start creating Topics. Click on "Topics".

On the Manage Topics page, select "Add Topic".

Enter the title in the Topic Title box. If desired, you can add the Parent Topic by clicking Add. This will nest your current topic underneath the Parent Topic that you have designated. After that, you have a series of templates to choose from.
Supplement File Template

This template links to the supplement files section, when you click Add/Edit Supplement File. You can select one file from your existing collection in the "Supplement files" tab, your desktop or the FTP. This template is ideal for html5 presentations (Articulate, iSpring, etc.), PPTs, and PDFs.

Templates with Media Boxes and Text Editors

On these templates, you will have a Media Box where you can upload image(s), video(s) or supplement file(s).

A few things to remember on the Media Box are:

- Any material uploaded will automatically be stored in its respective section under the Publishing tab (Images, Videos).
- Videos published here will appear in the Multimedia Room.
- On the Text Editor section, you can add text to explain your images or videos. If you paste your text from another text editor program, please do all the formatting in Text Editor.
- You can hyperlink text to another Topic when you select the Topic to Topic button.

![Media Box and Text Editor](image-url)
Empty Template

This template functions to create a "sub-genre" option -- NO material is attached to it; it's merely to be used as a Parent Topic for other Topics.

Save and Publish

Once you have created a Topic and added in the information using one of the templates, you can click the Save button or select the Save and Publish button. When you publish, a pop-up box will appear asking for your password, for security purposes.

You will be taken back to the Manage Topic page, where you can see your new Topic. At this point you can add a new topic by selecting "Add Topic" or preview your Table of Content by selecting the "TOC Selection" link. You can also add pages by selecting "Pages"; you can publish, de-activate by (selecting the Active icon), edit, or delete. When you are done, select the Content link at the top of your page to go back to the Content page.

You can also publish content from the Content home page by selecting "Publish". A pop-up box will appear asking for your password; click the Submit button to publish your Content.

Once your Content is published, select the "Assign" link.
In the Assignments page, you can assign your Content to groups by clicking "(+) Assign Group". You will have a list of all the groups create in LMS, click the Apply button when you are done.

If you want to assign your Content to individual Trainees, just select "(+) Assign Trainee(s)" under the Trainees tab. Select the Trainee(s) and click the Apply button at the bottom of the page.

After assigning your information, you can go back to the Content page, where you can deactivate, edit or delete the Content Titles. To delete Content Titles you will need to deactivate and delete the content from the bottom up. If you created pages for your content, your first delete the Pages, then delete the Topics, then Parent Topics, then you can delete your Content Titles.
Notes and Tips

- Once you select your preferred assignment method, you can always modify it; the only thing to remember is that if your choice was to Assign to All, you will need to un-assign the information manually from all the users who now should not have access.

- Pages are not indexed in the Library Table of Contents; for this reason, we recommend using Parent Topics and Topics only.

- If you would like to keep the material handy for your records, you can simply deactivate instead of deleting.
To access the Videos page, click on the menu item.

To upload your videos, click “(+) Add Video”.

On the Add Videos page, fill the mandatory starred fields. On the Add Video section, you will have a choice to upload videos directly from your desktop (up to 150 MB) or insert the Video URL from the FTP. Add a thumbnail image to your video by clicking the Choose File button on the Thumbnail Image section. Click the Save button.
After you click Save, the new video will be added to the list, where you can view, edit or delete it.

**Notes and Tips**

- For the Video section, you can upload .mp4, and .swf video files and .mp3 sound files.
- We recommend you add a few notes in the Keywords box, just to make your searches a bit easier.
- If you would like to pull videos from the web, here is a download helper for Firefox: [http://www.downloadhelper.net/](http://www.downloadhelper.net/)
- If you need a means to convert your files to different formats, here is one we recommend: [http://www.any-video-converter.com/products/for_video_free/](http://www.any-video-converter.com/products/for_video_free/)

**Vzaar Video Streaming**

We have set up an integration with Vzaar, a video streaming service, which allows large videos to be streamed on LearnWise seamlessly. The videos you upload in Vzaar appear to users in a new tab, called Video Library. The videos appear in a playlist, ordered by most recent upload first. This is completely separate from the Multimedia Room and the Content>Videos section.

**Vzaar Account setup**

1. The first step to using the Video Library is to create a Vzaar account.
   a. You will start by signing up with a free trial, and then you can upgrade your account to a paid version.
   b. You can select from different plans based on bandwidth and number of users who need access to uploading videos in Vzaar.
   c. Vzaar users are restricted by role – you can have editors, users, or uploaders.
2. Send your Account Representative your Vzaar username and API Key
a. In Vzaar, Go to Account> My Profile, and in the middle of the page it will show your username. This is NOT your email address, even though Vzaar allows you to login with your email.

b. Go to Settings>API to generate an API token. Click the ‘generate’ link and your token will appear underneath. Remember, API Keys must be unique between clients. If you have an Island site, please contact your Account Representative for more details about setting up your API tokens for all subsites.

Uploading Videos into Vzaar

Upload videos into Vzaar by clicking the upload video link in the top right corner. You should plan to upload at least a few videos into Vzaar before asking your Account Representative to enable the Video Library. Users will automatically see the Video Library tab when the privilege is enabled, so we recommend having your videos pre-loaded.

There are no controls or changes to the Learn-Wise Admin page, all changes to videos must be made in Vzaar. The only changes to Learn-Wise were made on the User side.

Notes and Tips

• ALL users see ALL videos that have been uploaded to Vzaar IMMEDIATELY after they have been uploaded. If you make changes to the video title, users will see changes reflected in their Video Library as you make them in Vzaar.

• Vzaar allows you to make many customizations to your videos, but the only changes that will appear in Learn-Wise are a title change or a thumbnail change. Likewise, playlists in Vzaar have no effect on how videos appear to Learn-Wise users.

• Currently, you cannot customize the Video Library tab name as you can with other tabs in Learn-
Supplement Files

To access the Supplement Files page, click on the menu item.

To upload your file, click on “(+) Upload Supplement File”.

Fill in the fields marked mandatory. On the Add Folder/File section, you will have a choice to upload files directly from your desktop (up to 150 MB) or insert a Supplement URL from the FTP. Again, you can choose to attach a thumbnail image to your information; just click the Choose File button on the Thumbnail Image section. Click the Upload button.
After you click Upload, the new supplement file will be added to the list; there you can view, edit or delete the new Supplement File.

**Notes and Tips**

- For the Supplement Files section, you can upload .zip, .pdf, .ppt, .pptx, .doc, .docx, .xls, .xlsx, .htm, .html, .mp4, and .swf files. This information is available for you if you hover over in the Supported Formats link.

- We recommend that you add a brief description in the Description box, just to make your searches a bit easier.
To access the Images page, click on the menu item.

To upload your images, click “(+ Add image”).

Add a name in the Title box. In the Add Image section, you can either upload files directly from your desktop (up to 20 MB) or insert the Image URL from the FTP. Click the Save button when you are done.
After you click Save the new image will be added to the list; there you can view, edit or delete the new Image.

Knowledge Checks

To access the Knowledge Check page, click on the menu item.

To upload your Knowledge Checks, click “(+ Add Knowledge Checks”.

There are two sections to this page. Under Knowledge Checks, add all the marked mandatory fields and click the Save button in order to continue to the Knowledge Check Questions.

In the Knowledge Check Questions, add your questions and the answer options and then select the correct answer by Check box. Click the Save Question button and add your next question. A list of questions will appear at the bottom of the page; you can then arrange the question order by clicking on Set Sequence. Click the Complete button.
After you click Complete, the new Knowledge Check will be available in your section tab. You can view, edit or delete the new Knowledge Check.
**Multimedia Room**

To access Multimedia Room page, click on the menu item.

To change the order of your videos, click on the "Set Sequence" link.

You will be prompted a pop-up window. Select and drag the videos in the order you prefer. Once you are done, click on the Apply button.

<table>
<thead>
<tr>
<th>Video Title</th>
<th>Topic Title</th>
<th>Content Title</th>
<th>Description</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carpectomy</td>
<td>Procedures 2 of 3</td>
<td>Lumbar Degenerative Conditions</td>
<td>Carpectomy Procedure</td>
<td></td>
</tr>
<tr>
<td>Endoscopic Discectomy</td>
<td>Procedure 3 of 3</td>
<td>Lumbar Degenerative Conditions</td>
<td>Endoscopic Discectomy - Transforminal</td>
<td></td>
</tr>
<tr>
<td>Transforaml Lumbar Interbody Fusion</td>
<td>Midline Approach 2 of 2</td>
<td>Lumbar Degenerative Conditions</td>
<td>Post Lateral Fusion</td>
<td></td>
</tr>
<tr>
<td>Transforaml Lumbar Interbody Fusion</td>
<td>Surgical Technique 3 of 6</td>
<td>Lumbar Degenerative Conditions</td>
<td>Transforaml Lumbar Interbody Fusion</td>
<td></td>
</tr>
</tbody>
</table>
To sequence these items, drag and drop each to the desired location and then click APPLY.

<table>
<thead>
<tr>
<th>Video Title</th>
<th>Topic Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corpectomy</td>
<td>Procedures 2 of 3</td>
</tr>
<tr>
<td>PostLateral Fusion</td>
<td>Midline Approach 2 of 2</td>
</tr>
<tr>
<td>Endoscopic Discectomy Transforaminal</td>
<td>Procedure 3 of 3</td>
</tr>
<tr>
<td>Transforaminal Lumbar Interbody Fusion</td>
<td>Surgical Technique 3 of 6</td>
</tr>
<tr>
<td>Compressive Load</td>
<td>Intervertebral Disc 1 of 3</td>
</tr>
<tr>
<td>Lumbar Total Disc Replacement</td>
<td>Incision and Approach 2 of 2</td>
</tr>
<tr>
<td>Posterior Lumbar Interbody Fusion</td>
<td>Surgical Technique 2 of 4</td>
</tr>
<tr>
<td>Degenerative Cascade</td>
<td>Degenerative Cascade 1 of 3</td>
</tr>
<tr>
<td>Percutaneous Vertebroplasty</td>
<td>Procedure</td>
</tr>
<tr>
<td>MIS Lateral Approach</td>
<td>Incision and Approach 2 of 2</td>
</tr>
<tr>
<td>Annulus Fibrosis</td>
<td>Intervertebral Disc 3 of 3</td>
</tr>
<tr>
<td>Chronic Lower Back Pain</td>
<td>Chronic Low Back Pain, Discogenic Origin 1 of 2</td>
</tr>
<tr>
<td>Anterior Lumbar Interbody Fusion</td>
<td>Operative Procedure 3 of 6</td>
</tr>
<tr>
<td>Stabilization training Exercise</td>
<td>Treatment Sub-Groups 1 of 7</td>
</tr>
<tr>
<td>Extensor Exercise</td>
<td>Treatment Sub-Groups 1 of 7</td>
</tr>
<tr>
<td>MIS TLIF</td>
<td>Procedure: MIS TLIF 2 of 9</td>
</tr>
<tr>
<td>MIS Presacral Approach</td>
<td>Procedure 1 of 6</td>
</tr>
<tr>
<td>Brachial Plexuses</td>
<td>Nervous Background</td>
</tr>
<tr>
<td>Standard Open Lumbar Laminectomy</td>
<td>Procedure 1 of 2</td>
</tr>
<tr>
<td>Minimally Invasive Lumbar Laminectomy</td>
<td>Procedure 1 of 2</td>
</tr>
</tbody>
</table>

Notes and Tips

- You can always hide videos by clicking on the Active icon.
- The first four videos on the list will show up as thumbnails in the users' home page.
Communications

The Communications Section allows the Client Administrators to send messages to individuals by User Type and Group, customize system e-mail templates, and add events to the calendar feature on the User homepage.

Access to Communications

To access the Communications subcategories, click the Communications menu item.

The Communications subcategories are:

- **User Message**
  - Users are notified of new messages from their Administrator on their homepage and can also be notified by email.

- **Email Template**
  - These messages are automatically emailed depending on certain actions in the system. They can be deactivated or edited to cater to your company.

- **Customized Calendar**
  - This is available to all Users on their homepage – events can be added/exported on the Administrator level and viewed/exported on the User level.
User Message

To access the User Message page, click on the menu item.

To add a new User Message, click on the “(+ Add User Message”.

Enter the Title and add content in the Message box. You can send out messages by User Type, Group, or Individual recipients from your user list. These notifications stay in their messages box until you deactivate them. Click on the Save button at the bottom of your screen.
Once you save the new message, it will be added to the list. You can activate, deactivate, edit or delete the new User Message at any time.
To access the Email Template page, click on the menu item.

On this page, you will have access to a list of pre-coded email templates. We recommend that you customize the following prior to launching the site to your users. You can do so by clicking on the edit icon.

<table>
<thead>
<tr>
<th>Template</th>
<th>User Type</th>
<th>Modified On</th>
<th>Status</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Sub-Admin (UserName)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create User (UserName)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create User (Password)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change Password</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reset Password</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Account Expiry</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Course Completion</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assign Trainee To Group</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AssignTrainee To TM</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>User Message Template</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training Module Reminder</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training Module Reminder (Without End Date)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AssignTrainee to LessonPlan</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lesson Plan Reminder</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Password Expiry</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Forgot Username</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Learn-Wise User Account Lock notification</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create Sub-Admin (Password)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
- Create Sub-Admin (UserName and Password)
  - Notifies Sub-Admins of account creation and password.
- Create User (UserName and Password)
  - Notifies User of account creation and password.
- Course Completion
  - Notifies User of MSE Course completion with link to certificate.
- Change Password
  - Notifies User of their changed password
- Reset Password
  - Notifies User that their password has been changed and supplies them with their temporary password
- Account Expiry
  - Notifies User that their account has expired
- Assign Trainee to Group
  - Notifies User that they have been assigned to a Group
- Assign Trainee to TM
  - Notifies User of Training Module assignment in LMS.
- User Message Template
  - Notifies User of User Message from Client Administrators.
- Training Module Reminder
  - Reminder email to User regarding Training Module assignment in LMS.
- Assign Trainee to Lesson Plan
  - Notifies User of Lesson Plan assignment in LMS.
- Lesson Plan Reminder
  - Reminder email to User regarding Lesson Plan assignment in LMS.
- Password Expiry
  - Notifies User of impending password expiration.
- Forgot Username
  - Supplies User with forgotten Username
- Learn-Wise User Account Lock Notification
  - Notifies User that they have been locked out of their account due to too many failed login attempts

On this template, you can update the Subject line and the Message of the email. Please do not alter text in double brackets in any way. These items gather information directly from the system to personalize the message accordingly. Changing the bracketed text will disable the functionality. After you are done editing, click the Save button.
Dear [[First Name]] [[Last Name]],

You have not yet completed "[[TrainingModuleName]]" and must complete this module by [[End Date]]. To complete this Training Module, please access the Learning Management System at [[URL]].

If you have any questions, please email your training administrator at [[ADMIN EMAIL]].

Thank you,
The [[Company Name]] Team
To access the Customized Calendar page, click on the menu item.

The calendar loads in Month view – click any day to create an event.
Create a Title for your event. By default the site has a check mark that will indicate an "all day event" on the Date item. You can uncheck the box and set a time. In the Location box, delete and type in your location, then click on the edit icon. A pop-up box will appear; edit the details about the location. You can also designate a Time zone. Click the Ok button to save. On the Category box, delete and type your new category, then click on the Edit icon. A pop-up box will appear; edit the details about the new category, and click the Ok button to save. On Description, add your event details. To save your new event, click the Ok button.

If Local time is checked, the time will update to the User’s time zone. Otherwise, it will reflect the Time zone selected on Location pop-up box.

Once you save the new event, it will be added to the User calendar. You can edit or delete the Event at any time.
The Administration Section allows Client Administrators to personalize features of the Administrator and User sites.

Access to Administration

To access the Administration subcategories, click the Administration menu item.

The Administration subcategories are:

- Account Security Configuration
  - Configure account security settings

- Customize Site
  - Customize your site colors and section titles on this tab.

- Help Box
  - This box is automatically populated with the Client Administrator’s information. You can edit the information and captions.

- Logo Management
  - You can upload your logo to brand your site - dimensions are specified in the upload page.

- Password Management
  - View account recovery questions and select a password expiration date.

- System Messages
- These messages appear after the User verifies their e-signature or makes progress on their Knowledge Checks.

- Variables
  - Here you can insert an email address to receive copies of every system email.

- Welcome Message
  - You will be able to edit and personalize this message on the User site.
To access the Account Security Configuration page, click on the menu item.

Determine the maximum number of login attempts allowed until the user is locked out of their account for a determined amount of time. This will only apply to Users, not Admins and Sub-Admins. Enter in the number of Login attempts allowed before they are locked out of their account. Then, enter in the time duration for the account lock. Click Save.

Users that have been locked out of their account will be listed under Accounts > Locked Users.

**Customize Site**

To access the Customize Site page, click on the menu item.
When you get to the Customize Site page, you will be able to modify the colors on part of your site. In order for you to update a color, just click on any Colored box.

You will get a Pop-up box. You can hover over the color range and select a color, or you can set a six digit hex code (sample: c02f33) on the box.
Once you have a new color, click on the Preview icon to view the change on your site.

If you click the Preview button at the bottom of the page, you can also preview your change on the User site. After you are done with all your changes, press the Apply button. You can always go back to the original settings if you click on the Load Original Setting button.

Also on the Customize Site page, you can update the User's site captions. If you select the Caption Change tab, you will be able to select the area that you want to update by clicking on the "edit languages" link. Once selected, on the Caption Language Specifications update your new title. Click the Apply button when you are done.
Help Box

To access the Help Box page, click on the menu item.

- Accounts
- Publishing
- Communications
- Admin
- Reports
- Certifications
- LMS

Menu:

- Account Security Configuration
- Customize Site
- Help Box
- Logo Management
- Password Management
- System Messages
- Variables
- Welcome Message
When you get to the Help Box page, you will be able to modify the default image logo. Thumbnails should be 40 x 40 pixels. To upload a new logo image, click on Upload LOGO Image and click on the Choose File button.

You will be prompted to select the new image from its location. To update the Text box, fill in the boxes with the new information. You can Preview and Save or Reset this information.
Logo Management

To access the Logo Management page, click on the menu item.

To load your company's logo, click on the Choose File Button, then click the Upload button. The logo image size must be 454 pixels long by 45 pixels wide. Once uploaded, your new logo will appear in the list. To apply the new logo to the site, click on the Inactive icon from the Status column on the old logo. The new logo will be placed at the top of the page.
Password Management

To access the Password Management page, click on the menu item.

Here you will find a series of password recovery questions. Select a language from the dropdown under Select Languages to preview the text. You can also determine the password expiration date by clicking the dropdown menu.
To access the System Message page, click on the menu item.

On this page you can review and edit any of the automated System Messages. From the Message For drop down, select the message you want to edit. Once you have selected the message, update its content on the text box. Click the Save button when you are done.
To access the Variables page, click on the menu item.

Here we have a series of drop down Variable Types. By default, when you access this page, the first variable you will see is the Email Address BCC option. (Although this is not required by the system, we highly recommend the use of this variable.)

The email entered in this field will receive every message sent out by the Learn-Wise system. Talk to your IT department about creating a designated "Records" email address that will allow you access to all the system messages. This will help you and the LW team to track issues that might occur in your messaging system.

Once you add this new email address to the Email Address box, click the Save button.

The other two Variables refer to Knowledge Check points. You can set a Total Number of Points for Knowledge Checks and Knowledge Check Points.
Welcome Message

To access the Welcome Message page, click on the menu item.

This page has a text editor where you can personalize the welcome board on the User site. You can edit the text and add images or video to your message. You can also view this message in HTML or Preview mode. To save your updates, just click on the Save button.
If you have international Users, you may want to utilize the User Language templates. To do this, select Yes for "Show Welcome message in User Language," and a drop down menu under languages will appear. The English template will contain your default welcome message, but all other language templates are blank until you fill them out.

Select the language template you would like to edit. The templates do not automatically translate the text you enter; you will need to enter the translated text yourself. When the User logs in, they will see the welcome message template designated for their language setting. For example, when a Japanese language User logs in, they will see the Japanese welcome message template. To save your updates, just click on the Save button.
Here you will be able to access information from different sources that could help you determine site activity, Users progress on assignments and overall performances on your Tests, just to name a few. You can filter, sort, search, print, and/or export any of the reports for a closer look.

Access to Reports

To access the Reports page, click on the Reports menu item.

This is the page you will see.
The Reports page is divided by three tabs:

**General Information Reports**
- Overall view of the User’s site usage and activity.
- Knowledge Check analysis.
- Credentialing Information.

**LMS Reports**
- Test score analysis.
- Reports based on Groups, Tests or Trainee.
- Progress Reports.

**Lesson Plan Reports**
- Reports on Lesson Plan performance

The Reports Section compiles data from different sources, so the question is:

“What am I looking for?”

Before you start going through the different Reports available, think about what you are looking for. There is a lot of information, so chances are, if you're searching for it, we've got it! The following are examples of some of the reports - playing around with this section will help you become more familiar with the reports you prefer.

**General Information Reports Examples:**

**Login Report**
To access the Login report, click on the View icon.

<table>
<thead>
<tr>
<th>Report Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Login</td>
<td>Number of logins on a user by user basis.</td>
</tr>
</tbody>
</table>

This Report provides data on Users' Login activity. Notable columns here are:
- No. of times logged in.
- Last Login Date.
- Average Session Time in Minutes.

**Knowledge Check Summary Report**
To access the Knowledge Check Summary report, click on the View icon.

<table>
<thead>
<tr>
<th>Report Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knowledge Check Summary</td>
<td>Completed knowledge checks sorted by user type.</td>
</tr>
</tbody>
</table>
This Report provides information on Knowledge Checks by User Type. Notable columns here are:

- Knowledge Check Title.
- Number of points assigned to the KC.
- Number of Users per User Type that have completed the KCs.

To access the Credentialing Completions (by Title) report, click on the View icon.

This Report provides data on Credentialing Course completion. Notable columns here are:

- Course Title
- Total times completed
- Detailed Report (you can find additional data)
LMS Reports Examples:

Test Score Analysis Report
To access the Test Score Analysis report, click on the View icon.

<table>
<thead>
<tr>
<th>Report Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test Score Analysis Report</td>
<td>Average scores and percentage of correct answers per question on a test by test basis.</td>
</tr>
</tbody>
</table>

This Report provides a percentage of times questions in the test were answered correctly for all the attempts that were made. Notable columns here are:
- Training Module Title
- Test Title
- Results (overall average percentage of test)

<table>
<thead>
<tr>
<th>Training Module Title</th>
<th>Test Title</th>
<th>Result in %</th>
<th>Training Module Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amanda_Demo</td>
<td>Amanda_Demo</td>
<td>66.00</td>
<td>✓</td>
</tr>
<tr>
<td>Arthrosis Demo</td>
<td>Arthrosis Demo</td>
<td>50.00</td>
<td>✓</td>
</tr>
<tr>
<td>Articulate Demo_Spine Wave</td>
<td>Articulate Demo_Spine Wave</td>
<td>50.00</td>
<td>✓</td>
</tr>
</tbody>
</table>

The data found here can be useful to assess the difficulty of the test or a particular question.

Trainee Performance Report
To access the Trainee Performance report, click on the View icon.

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Training Module</th>
<th>Test Title</th>
<th>Highest Score</th>
<th># of Attempts</th>
<th>Last Attempt Date</th>
<th>Result</th>
<th>Training Module Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demo</td>
<td>User</td>
<td>Amanda_Demo</td>
<td>Amanda_Demo</td>
<td>50</td>
<td>2</td>
<td>June 09, 2015</td>
<td>Fail</td>
<td>✓</td>
</tr>
<tr>
<td>Demo</td>
<td>User</td>
<td>Arthrosis Demo</td>
<td>Arthrosis Demo</td>
<td>100</td>
<td>2</td>
<td>April 13, 2015</td>
<td>Pass</td>
<td>✓</td>
</tr>
<tr>
<td>Demo</td>
<td>User</td>
<td>Articulate Demo_Spine Wave</td>
<td>Articulate Demo_Spine Wave</td>
<td>100</td>
<td>4</td>
<td>June 09, 2015</td>
<td>Pass</td>
<td>✓</td>
</tr>
</tbody>
</table>
There is a lot of useful data available in all Reports Sections that can be customized to suit any specific need using the Search files. Please feel free to contact your Account Representative if you have questions about specific reports.

### Reports: How did you set up the Training Module?

The information you can get from your reports depends on how you set up the Training Module.
In the Certifications Section, you will find all the vendor credentialing courses available to your Users. Magnifi Group administrates and updates the courses every two years, with the exception of some annual courses such as National Patient Safety Goals. The content in these courses cannot be altered, but you may deactivate courses if you would like. When deactivated, they will no longer appear in the users' credentialing tab.

Access to Certifications

To access the Certification just click the menu item.

![Certification Courses](image)

This is the page that you will see. You will have a list of all the courses available to your Users. You can deactivate these courses by clicking on the Active icon.
As we do not have sales representatives in the field, we hear about credentialing courses from you. If a new course needs to be added or an update to an existing course needs to be made ahead of our change schedule, please feel free to contact your Account Representative.
**Premium Credentialing**

**What is Premium Credentialing?**

The Premium Credentialing feature is a Learn-Wise add-on that allows the Administrator to set reminders for vendor credentialing courses, indicate deadlines and reminders for distributed documents, and view reports on documents that have been assigned to and uploaded by the User. The User can also upload HR materials, ID information, profile pictures, and other identifying documentation that can be viewed by the Administrator.

**Administrator Side**

For the Administrator, a new set of subsections will be added under the **Certifications** tab on the homepage.

![Certifications](image)

**Certification Courses**

The Certification Courses tab remains mostly the same. It lists all the available certification courses and gives the Administrator the ability to activate or deactivate any courses they would like. The new option is the **Set Course Expiry** link, which allows the Administrator to set a deadline for a course reminder. (Expiry date refers to how many months the certificate is valid.)

![Certification Courses Table](image)

As seen in the screenshot below, the Administrator has the option of setting an expiration period in the following increments: 6, 12, 18, 24, or 36 months. In the **Certifications Email Templates** section (pg. 7), you will find a template called the **Certification Course Expiry Notification** that will allow you to set the timeframe for the first reminder, as well as the interval for the remaining reminders.
Certifications Group

This section will allow you to designate which Users will receive access to the Premium Credentialing tabs. (Users who do not have this section enabled will continue to see the list of courses, as usual.) You can add new Users to this Group by clicking Assign Trainees, and you can also view existing Users’ credentials by clicking on the Credentials link next to each name.

Clicking on Credentials allows the Administrator to see which documents have been assigned to and uploaded by that particular User. The Administrator can assign Credentials to each individual User under Upload/View Credentials.
After accessing the Upload/View Credentials for a User, the following screen will appear, allowing the Administrator to designate a Credential Title, Credential Type, and corresponding Reminder Email for the uploaded document.

In addition, the Administrator can also set Reminders for any documents that the User has independently uploaded. Under the **Uploaded by User** tab, the “Set Reminder” link will allow the Administrator to select a Reminder date and designate a set interval for reminders.
The ability to **View** and **Set Reminder** for credential documents uploaded by the user are optional features. Contact your Account Representative if you would like these features enabled/disabled.

**General Documents**

The General Documents section is where the Administrator can create document Categories and upload/view documents within these categories. A column also indicates the total number of documents that have been uploaded under each specific category. Whereas the User is limited in their category types, the Administrator can create whatever classifications they would like by entering a title in the **Category Name** field and clicking Save.

**Certifications Email Templates**

As with the general email templates on Learn-Wise, the Certifications Email Templates section contains **automated emails** that are triggered by specific actions on the site (e.g. a new course is available, there is an upcoming reminder date, etc.). The Administrator continues to have the option of activating/deactivating any templates they would like, as well as editing the text *(so long as they do not touch the items in the double brackets)*.
Two emails are sent to Users upon being assigned to Certification Group: Assign Trainee to Certification Course Group and Take Courses.

Vendor Information

The Vendor Information section displays the same general information that the User sees for each of the major certification sites: Reptrax, Vendormate, VCS, and Parallon. If you would like to see any other companies on this list, please contact your Account Representative for more information.

You have the option of Viewing User Credentials (ability to see user credentials a User uploads) and Setting a Document Reminder (ability to set reminders for credentials that a User uploads). Talk to your Account Representative for more information about these functions.

For Users

On the User Side, in addition to the existing Courses sub-tab, there will be Credentials and Vendor Information sub-tabs.
Courses

The Courses tab remains the same, as is seen in the screenshot above—all courses are available for Users throughout the year. Users can view any Courses they have already finished under the Completed Courses button, where they can also generate certificates.

Credentials

The Credentials tab allows Users to view any documents that have been pushed down to them by their Administrator, as well as personal documents that they have uploaded themselves.
The types of documents that Users are permitted to upload are within the following categories: TB Test, Hep B, Drug Panel, MMR, Varicella, and H1N1/FLU. If the Administrator has set an update reminder, that date will also appear in the “Reminder to Update” column under Personal Documents.

Vendor Information
The Vendor Information tab allows Users to view general contact information for each of the four major Vendor Credentialing Organizations: Reptrax, Vendormate, VCS, and Parallon.
<table>
<thead>
<tr>
<th>Organization</th>
<th>Email</th>
<th>Phone No.</th>
<th>Fax No.</th>
<th>Website Link</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reptrex</td>
<td><a href="mailto:support@reptrex.com">support@reptrex.com</a></td>
<td>214.222.7484</td>
<td></td>
<td><a href="http://www.reptrex.com">www.reptrex.com</a></td>
<td>Information</td>
</tr>
<tr>
<td>Vendormate</td>
<td><a href="mailto:support@vendormate.com">support@vendormate.com</a></td>
<td>877-483-6368</td>
<td></td>
<td><a href="http://www.vendormate.com">www.vendormate.com</a></td>
<td>Information</td>
</tr>
<tr>
<td>VCS</td>
<td><a href="mailto:hello@vcsdatabase.com">hello@vcsdatabase.com</a></td>
<td>866.373.9725</td>
<td>281.946.8300</td>
<td><a href="http://www.vcsdatabase.com">www.vcsdatabase.com</a></td>
<td>Information</td>
</tr>
<tr>
<td>Parallon</td>
<td><a href="mailto:business.solutions@parallon.com">business.solutions@parallon.com</a></td>
<td>855.478.7255</td>
<td></td>
<td><a href="http://www.parallon.com">www.parallon.com</a></td>
<td>Information</td>
</tr>
</tbody>
</table>
LMS (Learning Management System)
In the LMS section you will be able to create and assign Training Modules to your Trainees.

Access to LMS

To access the LMS subcategories, click the LMS menu item.

The LMS subcategories are:

- Trainees
  - Users in the system are automatically added as trainees in the LMS if the LMS function has been enabled for their User Type.

- Training Modules
  - Create Training Modules consisting of content and/or a test section. Then assign to your Users.

- Certificate Manager
  - Allows you to manage and customize certificates for your Training Modules.

- Lesson Plans
  - Allows you to group Training Modules together to assign to your Users.

- Training Categories
  - Allows you to organize your courses into categories.
To access the Trainees page, click on the Trainees menu item.

Here you will find all the Users that are able to be assigned training modules. If you click the "Training Module" link, you will find the Training Modules assigned to the Users individually or by group affiliation. You can also assign new modules to your Trainee, by selecting "(+) Assign Training Module(s)". Select the new module and click the Assign button at the bottom of the page. When you add a new module, you can deactivate it, "View Content" or delete the module from the Trainee list.
If you click on "Test Details", you will find a detailed report on all the tests completed by your Trainee. If you select "View", you will see more information regarding the Training Module. "View Test Details", will show you the questions and the Users' answers.
## Trainees

**Home > Trainees**

<table>
<thead>
<tr>
<th>Name</th>
<th>User Type</th>
<th>Status</th>
<th>Group</th>
<th>Sub Group</th>
<th>From</th>
<th>To</th>
</tr>
</thead>
</table>

**Search**  
**Reset**

**Records shown per page**: 20

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>User Type</th>
<th>Lesson Plan</th>
<th>Training Module</th>
<th>Test Details</th>
<th>Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>User</td>
<td>Testing</td>
<td>Lesson Plan</td>
<td>Training Module</td>
<td>Test Details</td>
<td>Group</td>
</tr>
<tr>
<td>Demo</td>
<td>User</td>
<td>Testing</td>
<td>Lesson Plan</td>
<td>Training Module</td>
<td>Test Details</td>
<td>Group</td>
</tr>
</tbody>
</table>

## View Test Result

**Home > Trainees > Test Results > View Test Result**

**Traine Name**: 2 User  
**Lesson Plan**: Not Applicable  
**Training Module**: Sample  
**Test Title**: Sample Test  
**Required Passing %**: 100

<table>
<thead>
<tr>
<th>Attempts</th>
<th>Question</th>
<th>Attempted Questions</th>
<th>Correct Answer</th>
<th>Time Taken</th>
<th>Status</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>001</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>00:00:05</td>
<td>Pass</td>
<td>View Test Detail</td>
</tr>
</tbody>
</table>

## View Test Result Details

**Home > Trainees > Test Results > View Test Result Details**

**Traine Name**: 2 User  
**Lesson Plan**: Not Applicable  
**Training Module**: Sample  
**Test Title**: Sample Test  
**# of Attempts**: 1

### Test Summary

1. **What is the answer?**
   - 1. Answer
   - 2. Wrong

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When you select the "Group" link, you will be able to view what groups this Trainee is a member of and assign the Trainee to Groups. If you click the "(+ ) Assign Group" link, you will be able to add the Trainee to a new Group. Select the new Group and click the Assign button. On this page, you can also create a new Group by selecting the "(+ ) Create Group" link (We will review this process next). The Active icon shows the Trainee status in Learn-Wise. On the Groups page, you can deactivate the Trainee within the group by clicking on the Trainee Status in the LMS Group icon. If you select that option the Trainee will remain part of that Group, but will not receive any notifications or emails associated with that Group. You can select on the Delete icon, in this case the Trainee will be removed from the group.
To access the Training Modules page, click on the Training Modules menu item.

To create a new module, click "(+) Create Training Module."

Enter in the mandatory fields. You will need to specify if your Module is going to be a SCORM Module, enter a Title, etc. You will also need to select a module type; you can have a module with content only, a module with content and up to three tests (each must be passed to proceed to the next), or a module with a test only. If you have chosen to include a test with your training module, after you are done with the mandatory fields, click the Save and Create Test button.
Content for your Training Module can be pulled from published materials in your Content section, linked via FTP URL, or uploaded directly from your desktop. The following formats are currently supported by the content upload feature:

PDF, AVI, PPT, PPTX, JPG, BMP, GIF, WMV, DOCX, DOC, SWF, PPS, ZIP

Here are a few additional settings we highly recommend that you add to your Training Modules. Set up a Start Date, add an eSignature, attach a Certificate, Send Remainder notifications and Email Trainee when Module is passed. Before you leave this page, please take a close look at the boxes that cannot be edited once the User has accessed the module.

If you are sending completion emails you can choose to do so from one of our supported languages.
If you would like to duplicate a Training Module you have already created, click the Copy Module icon.

If you decide to include a test and content in your Module, up to three tests can be created for any one module – one pre-content, one parallel with content, and one post-content. If you do a test-only Module without content, you can still create multiple tests per Training Module. Enter all the required fields; Test Title, No. of Questions in the pool (Total # of questions available, No. of Questions in Test (# questions pulled from pool), Max No. of Attempts, and Required Passing Percentage. Click the Save or the Save & add Question button.

Some additional settings that we highly recommend are the Track Time and Show Results features. Before you leave this page, make sure to review the boxes that cannot be edited once the Users have accessed the module.
Notes and Tips

- If you select to Show Results with Correct Answers, the User will be able to review the answers at the end of the assigned test. Once the User navigates away from the test, they will no longer have access to this information.

- Training Module Parameters: “User can attempt module in multiple sessions” if this is set to “No” then users cannot close the window until they complete the module is complete - or they will fail.

- Review Module: Users can review a training module (test included) after they have completed it. The score from Review mode is not recorded in the system.

From the Question Type dropdown, select from the following options: multiple choice / multiple selection / true or false / mix and match / fill in the blank / drag and drop / sequence.

In the Question Text box add your question and select or add your answers.

When you select the “Drag and Drop” question type, a screen will appear allowing you to upload a 500 px x 750 px image, as shown below. The User will be prompted to correctly match the numbered labels to the fields you indicate on your image. A maximum of 12 label boxes can be added.

If you need any assistance on how to use the Drag and Drop, just hover your cursor over the “How do I do this?” link, which will provide you with instructions on how to proceed with the creation of the Drag and Drop question.
Note: For the system to correctly register the User’s answers, both the Administrator’s and User’s browser zoom level should be set to default (i.e. 100%).

Once you are done creating questions, you can Create Additional Test go Back to the Modules or Test Manager, or Assign Module to Trainee(s).
Once the module is passed/all attempts are failed/the end date has passed, the user can no longer access the module test. The module moves to their completed tab; they can only access the module content.

On the Training Modules home page, you can view the parameters and question for the test associated with a given module by selecting the "Test" link. Click the Assignments icon to assign the module to Groups and Trainees. Click the Green status button to deactivate the module. If inactivated, the module will no longer be available to Trainees. Clicking the "View Content" link will allow you to view the Module. Click the Edit icon to edit some parameters of the Training Module (restrictions noted earlier in this section). A Training Module can only be deleted if it has not been assigned to any Trainee(s).
Uploading SCORM Content

Learn-Wise allows you to upload SCORM content-based training modules using the following SCORM versions:

- SCORM 1.2
- SCORM 2004 3rd Edition

The preferred settings for SCORM modules are as follows:

- Each module should have a “Finish” button.
- Each module should be set such that data is reported to Learn-Wise upon clicking the “Finish” button. For example, including a results page in Articulate Storyline.
- Contact your Account Representative for specific program requirements.

To upload a SCORM Module, you must click on Yes and provide all the information for the mandatory field. Press the Save & Assign button when done. Please take a look at our recommended settings. The highlighted boxes can be edited, but any changes made after the module has already been assigned will only apply to newly assigned Trainees moving forward.
Certificate Manager

To access the Certificate Manager page, click on the Certificate Manager menu item.

To add a new certificate, click "(+ Add Certificate)."

On the Add/Edit Certificate page, enter the Title of your new certificate. Click the Choose File button to browse through your computer and locate your logo file and background image file if desired. Once you have selected the file, click the Save button, or Preview button to preview the file. If using e-signature, the certificate will be stamped with the date and time of completion, as well as the identity verification.
On the Certificate Manager page, you can view the logo attached to your certificate by pressing the "Logo" link. Press the View icon to download the certificate to your computer. Click the Edit icon to edit the name and the logo in your certificate. You can also delete the certificate by pressing the Delete icon.
Lesson Plan

To access the Lesson Plans page, click on the Lesson Plans menu item.

To create a new Lesson Plan, click (+) Create Lesson Plan.

Enter in the mandatory fields.
There are two options to determine the duration of a specific Lesson Plan:

- **Number of Days**: refers to a set number of days (i.e. 30 days) that the Lesson Plan is available. For example, if you select 30 days and assign it to a batch of users on November 1, they will have until November 30 to complete the Lesson Plan. And then, if you assign it to another batch of users on February 15, they will have until March 14 to complete the training.

- **Set Date**: refers to a specific time frame of calendar dates that the Lesson Plan is available. Select the Start and End date.

- **Select Training Modules** determines which Training Modules will be included in the Lesson Plan. In order for you to select a module, it must already be created and complete for you to be able to include it in your Lesson Plan.
• **Select Lesson Plan Type** refers to either a Sequential or Non-Sequential Lesson Plan.
  - Sequential: means that each module is a prerequisite to the next module. Users cannot access the second module until the first has been completed.
  - Non-Sequential: means that the modules in the Lesson Plan can be completed in any order.

• All modules need to be passed for the Lesson Plan to report Pass. In a sequential Lesson Plan, if a user fails the first module, they will immediately fail the Lesson Plan and will not have access to the other modules. In a non-sequential Lesson Plan, they will still be able to access and complete the other modules, but the Lesson Plan will still report Fail if they have failed any modules.

• **Send Reminder** determines if and when reminder emails will be sent out to Users to complete this Lesson Plan. Select when the reminder emails will start and how frequently they will go out.

When all mandatory fields are filled in, click Save & Assign.

Lesson Plans can also be copied the same way Training Modules can be copied. To copy a Lesson Plan, click “Copy Lesson Plan”.
Training Categories

Both admins and users can search for Training Modules and Lesson Plans and sort through modules and assignments by Training Category. You can add or create training categories from the Create Training Module page or the Create Lesson Plan page, or from the Training Categories section. To access the Training Categories page, click on the Training Categories menu item.

On the page, you will see a list of your Training Categories. To add a new category, enter the name of the category into the “Training Category” field, and click Save. Your new category will appear in the table below.

If you need to edit the names of your categories, click on the Edit icon, change the title in the “Training Category” field, and click Save.
A Training Category can only be deleted if it has not been applied to Training Modules and Lesson Plans. To delete a Training Category, you will first need to remove the category from all of the Training Modules and Lesson Plans that are labeled under that category. If a training category is not assigned to any training modules or lesson plans, the delete button will be active, allowing you to click on it and delete the category.
Learn-Wise iPad App

The Learn-Wise iPad App allows Client Administrators to push down materials that their Users can download and later access without Wi-Fi. This is particularly useful for presentations in environments with limited or no online connectivity, such as hospital areas and the OR.

In addition, an Apple Enterprise ID is required to distribute the app in-house to employees (more info here: https://developer.apple.com/programs/ios/enterprise/). This is an Apple policy independent of Magnifi Group and the Learn-Wise platform.

The Learn-Wise App is meant primarily for distributing read-only files and is not intended for training purposes; however, Client Administrators have flexibility with the types of files they can upload. These file types include:

- Images: .jpg, .png, .gif
- MS Office & Acrobat files: .doc, .docx, .xls, .xlsx, .ppt, .pptx, .pps, .pdf
- Videos: .mp4, .mov

Assigning materials to your Users with the Learn-Wise App is very simple, but it does require a few different steps. Follow the guide below to get started!

Enable iPad App for Users

To provide an iPad PIN to your users please select the Accounts tab and choose Users.

In the Users page, click on the Edit icon to update the User’s data.
On the Edit page, select the checkbox for Generate iPad PIN – this will give your User access to the code they need in order to download and access the iPad app. Click the Save button when done.

This can be done in bulk for a large number of users with the “Import Users” Excel sheet and the “Overwrite Existing Records” feature on Learn-Wise. For more information on this process please review Accounts > Adding User in Bulk or contact your Account Representative for more information.

Managing Content in the iPad App

To access the iPad App sub-categories, click the iPad App menu item.
The iPad App sub-categories are:

- **Upload**
  - You can upload multiple read-only type files for demonstration purposes.

- **Organize**
  - Client Administrators will be able to sort information in folders and set sequences for later distribution.

- **Assign**
  - Here, you will select the Users that you would like to receive access to the resources.

**Upload**

To access the Upload page, click on the menu item.
On this page, you will find all the resources you have uploaded thus far. To upload a new file click the "(+) Upload Resource" link.

Click the Choose File button to select the file(s) you want to upload. After that, you can choose to Rename Resource if Exists, which allows you to change the name of a file that has already been uploaded. You can also select to send via Email, this enables the option for sending this particular file via email once the user has accessed it from their iPad. If a rep is showcasing a presentation in the OR, they can push out that email-enabled file directly to the audience’s email address. Press the Upload button when done.

The new resource(s) will be added to the list, where you can edit or delete if necessary.
Resources that have been put into folders and assigned to Users will have a grayed out “Delete” button. If the file is not assigned, you will be able to delete it.

**Organize**

To access the Organize page, click on the menu item.

After uploading your resource, you will need to sort it into a folder. To create a new folder, click "(+ Add Folder)".

![Organize page screenshot](image-url)
To access your folder options, right-click on the title of your new folder and select one of the following items:

- Add Child Folder: Create a subfolder underneath your existing folder.
- Assign Resources: Put files from the Upload section into a folder or subfolder.
- Rename: Rename your folder or subfolder.
- Delete Folder: Delete the selected folder or subfolder. This folder will no longer appear after the user has refreshed their app.

Click on Assign Resources to insert uploaded files into your new folder.

A new menu will appear with the available options that you have already uploaded. Once selected, click the Assign button.
Your folder will now contain the resources that you have designated. Click on your folder to view the resources inside. Un-assign resources at any time by hitting the red “Un-Assign” icon.

Assign

To access the Assign page, click on the menu item.

Here, you will select the Users that you would like to have access to the resources. Only folders with resources inside will appear in the Folder View tab.

As with the Learn-Wise LMS section, you can push out materials to your users by Sub-Group or by individual Trainee.
In the Sub-Group View tab, you can do any of the following:

- Create Group
- Assign Trainees to Sub-Group
- Assign Folders to Sub-Group: Only Trainees assigned to this particular Sub-Group will be able to see the designated folders and resources.

If you would like to assign by Trainee, select the Trainee View tab and click on "Training Resource" in order to push out a folder. Here, you will also be able to view all the folders that are already assigned to this user (by Trainee and by Group).

Once on this page, click the "(+) Assign Training Resource" link in order to give this user access to a folder.
From there, you can select the desired folder and click the Assign button.

![Assign Training Resource](image)

Before you can assign the resource to the User, a pop-up window will appear. Click the Ok button to continue.

![Pop-up window](image)

**Installing the iPad App**

To install the LWC App, Users will need to log onto their Learn-Wise site using mobile Safari on the iPad. On this page, select SHOW IPAD ACTIVATION PIN at the top right of their homepage.

![Interactive Educational Program](image)

This PIN is a one-time code that they will need to write down in order to initiate their iPad App. After they have input the PIN once, they will no longer need to use it to access the app.
After clicking, Users will see a pop-up window displaying their Activation PIN and the link to Install App. After noting the Activation PIN, the user will then click Install App.

Once the iPad app has finish installing, the following icon will appear, unless you have chosen to customize the name and logo of the app with your company information.

The User will then click on this app to activate it. Doing so will prompt them for the Activation PIN. Enter the PIN and press Go.

Once the PIN is confirmed, Users will then have full access to the folders and resources that have been pushed out to them. These resources are viewable in either Portrait or Landscape, and the “Folders” sidebar can be swiped in or out on the Portrait view.
When a new folder or resource is available, the User will receive a notification on their App. To receive the file, the user simply needs to hit “Refresh” at the top right-hand corner of the app screen.
Learn-Wise Tips and Tricks
In this chapter we will show you how to find your internet browser version, use your zoom levels and how to create a screenshot.

Finding Your Browser Version

Go to www.whatbrowser.org, OR:

Locate the “Settings” icon for your particular browser, and click the “About” drop-down. A Pop-up or new page will appear with the browser information.

Microsoft Internet Explorer
There are a few websites that can help you find the iOS (Operating System) being used on your iPad. One of our favorites is [www.whatsmyiosversion.com](http://www.whatsmyiosversion.com). This website not only shows you the iOS, but also includes a few other technical items that might come in handy.
Setting Your Browser Zoom Level

In order for Learn-Wise to correctly register answers on Drag and Drop questions, the browser zoom level must be at 100%. Here, we will show you how to set zoom levels for different browsers.

Locate the “Settings” icon for your particular browser, and adjust accordingly. If there is no automatic “100%” option (such as in Firefox and Safari), simply restore your settings to “Default.” You can do this easily by pressing Ctrl + 0.

Microsoft Internet Explorer

Mozilla Firefox
How to Take a Screenshot

It is essential for Sub-Administrators and Users of Learn-Wise to know the usefulness of getting an accurate screenshot. Screenshots allow Account Representatives and our technical team to have quick access to the view on your screen in order to identify problems and provide you with fast solutions.

On a Windows PC

To Screenshot the entire screen, press the “PrtScn” key on your keyboard.

Right click and paste into any document (MS Word, MS Paint, Email). Save the new document when you are done.
To Screenshot a selected area, search for the Snipping Tool ( ) in your start menu and open the application.

The tool will open. From its drop down menu you can select Free-form Snip to draw a line and select a free-form area, Rectangular Snip to select an area to screenshot, Window Snip to select a window to screenshot, or Full-screen Snip to screenshot your entire screen. All new tools need some time to learn, take your time and select what works best for you.

Select Rectangular Snip and click “New.” Your cursor will turn into a cross hair, forming a red box around the selection. Drag the red box over the area you want to screenshot.
Click the Save icon to save your screenshot as an image file.

On an Apple Mac

To Screenshot the entire screen, hold down Command-Shift-3: this will take a screenshot of the entire screen and will save the file to your desktop.

To Screenshot a window, hold down Command-Shift-4-space bar. Your cursor will turn into a camera icon ( ). Select the window you want to screenshot and the image file will be saved to your desktop.
To Screenshot a selected area hit "Command-Shift-4 ", your cursor will turn into a crosshair like this ( ). Proceed to drag the crosshair over the area you want a screenshot of and release. The image file will be saved to your desktop.

Please feel free to contact your Account Representative if you have any questions about this process, and we will be more than happy to help you.
Troubleshooting

Please have the following information available when contacting your Account Representative about a problem:

1. Browser Type
   Internet Explorer / Chrome / Firefox / Safari
2. Browser Version Number
   To find your browser version number, go to http://whatbrowser.org
   The versions of each browser that we currently support are at the bottom of the Learn-Wise home page.
   Supported Browsers:  
   ![v9,10,11,6,7,8,OS 7,8]

3. Device Information
   Are you or your Users accessing Learn-Wise from a PC, Mac, iPad, or other device?

4. Issue Details
   Describe the issue in detail and list all User(s) / Training Module(s) / Content material(s) / Email Template(s) you are experiencing issues with.

5. Approximate Time of Occurrence
   If available

6. Screenshots and/or Screencasts
   Screenshots and screencasts give us insight into the issues you’re experiencing and ultimately help us resolve the issue more quickly. Please provide screenshots of any application errors or error messages, and screencasts of steps we can take to recreate the issue.
   - SCREENCASTS: Jing (download: http://www.techsmith.com/jing.html)
   - SCREENSHOTS:
     - **PC**: use the Snipping Tool (pre-installed on Windows) to take screenshots
     - **Mac**: Command + Shift + 4
     - **iPad**: press the home button and the sleep/wake button simultaneously

Learn-Wise Contact Information:

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