



# IMPLEMENTATION GUIDE

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# About This Guide

This is an essential resource for implementing SmarterU. It explains key concepts and guides you through the process of planning and launching your learning environment.

Before starting your implementation, we recommend that you read this guide in its entirety so that you understand the entire process.

# Before You Begin

## Experience SmarterU as a Learner

Learn the ins and outs of setting up your SmarterU account by [enrolling in and completing the SmarterU Academy](#). Our story-based Academy is based on real-world scenarios and focuses on key topics and settings.

The courses include:

- SU000: Welcome to SmarterU
- SU100: Groups, Teams, and Organizations
- SU110: Permissions
- SU115: Creating Users
- SU120: Online Courses
- SU125: SCORM Courses
- SU130: Instructor-led Courses and Waiting Lists
- SU140: Enrolling Users
- SU150: Reporting
- SU160: The Knowledge Base
- SU200: Structuring Learning Plans
- SU210: Using Learning Plans

After completing the above courses, you'll be presented with a certification exam. Upon passing the exam, you'll receive a free hour of coaching and faster response times from our Support team.

# Understand Your Resources

Our team is here to provide all of the tools you need to launch a successful training program and support your learners. Some of our most valuable tools are described below.

RESOURCE	DESCRIPTION
Help Center	Access our online knowledge base at <a href="https://support.smarteru.com/">https://support.smarteru.com/</a> .
In-App Chat	<a href="#">Chat with our Support team</a> directly from SmarterU's Admin Dashboard. We're always happy to help.
Status Page	Check for maintenance periods and any incidents at <a href="http://status.smarteru.com/">http://status.smarteru.com/</a>
Support Team	If you ever have trouble finding what you need, send an email to <a href="mailto:support@smarteru.com">support@smarteru.com</a> .
YouTube	Subscribe to our <a href="#">YouTube channel</a> to stay current with what's new in SmarterU.

# SmarterU Implementation Overview



## Structure Your Account

- Plan your groups
- Identify users
- Plan your courses



## Configure Your Account

- Specify account settings
- Brand your account
- Configure your email
- Add groups



## Build Your Content

- Add users
- Add courses



## Pilot and Analyze

- Conduct a pilot
- Analyze feedback from the pilot
- Adjust your implementation

# Prepare for Your Implementation

## Define Your Goals

Improving performance is one of the key reasons to invest in training. To identify whether there's been an improvement in your learners' performance, you'll need to define goals that link your learning objectives to your training program and to each learner's job performance.

What is it that you're trying to accomplish? Are you trying to improve customer satisfaction scores at your call center? Reduce the number of safety incidents? Increase awareness of cybersecurity attacks?

Whatever your goals are, make sure that they're specific and measurable so that you can determine whether your training program is on the right track.

We recommend that you identify the following goals:

1. Learning Objectives
2. Job Performance Goals (these must be metrics you can measure)
3. Training Program Goals

Once you decide what you want to improve, you need to determine how you'll measure success. What metrics or key performance indicators (KPIs) will best show progress toward the outcomes you've identified? Knowing this will allow you to really demonstrate the benefits of your training investment and share measurable results with stakeholders.

### ACTION ITEMS

- Determine the top goals for your training initiative.
- Identify the initial set of training courses that you want to deploy. For each course, determine specific learning objectives and tie them to action words that are measurable in job performance.
- Determine what knowledge your learners need to influence the behaviors you've identified.
- Evaluate key performance metrics within your organization that relate to the content that will be provided in your training.
- Decide on the KPI that best demonstrates whether learners are applying the knowledge they gain from training.
- Design a communication/change management plan that focuses on your end goals, and consider which metrics need to improve to achieve those goals, which behaviors drive those metrics, and how the training will align all of these elements.



# Overview of Key Objects

There are three key objects that you'll need to create for your implementation: courses, users, and groups. Before you can plan what you'll add to SmarterU, you'll want to understand how these three objects relate to one another.

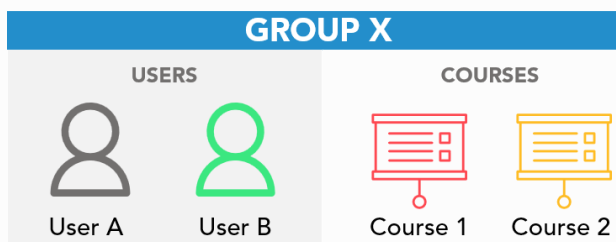
**Courses** are the easiest of the three to understand. These are the training classes that will be available in your account.

**Users** are the people who will be logging into SmarterU to either take courses or manage something in the system.

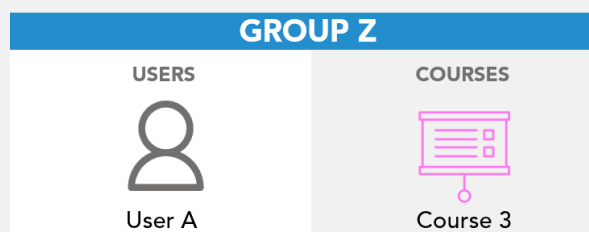
**Groups** provide a way to organize your training and can be associated with objects such as courses and users. Each user belongs to one or more groups. When you assign a user to a group, you're allowing them to be enrolled in courses that are assigned to the group.

**NOTE:** Each of these objects is discussed in more detail in other sections of this document. This section is focused on helping you understand how the three work together so that you can properly plan your content and structure your account.

For example, both users in group X can be enrolled in course 1 and course 2 since these courses are assigned to the group.



Because user A also belongs to group Z, user A can also be enrolled in course 3.



*Group users can be enrolled in courses assigned to their group*

Each user must be assigned a [home group](#). Although users can be assigned to multiple groups, the home group is a user's main group. Home groups provide greater control over who can view and edit that user's information, including the user's profile and their enrollments. We'll cover home groups in more detail in the [Granting Permissions with Groups](#) section.

The order in which you create your courses, users, and groups is up to you. The important thing is that you plan them out while considering their relationships with one another.

**NOTE:** When it's time to start adding content to SmarterU, keep in mind that you don't have to add all your groups, users, and courses at the same time. You can take an incremental approach by adding a subset of your groups, users, and courses, then adding the others later.

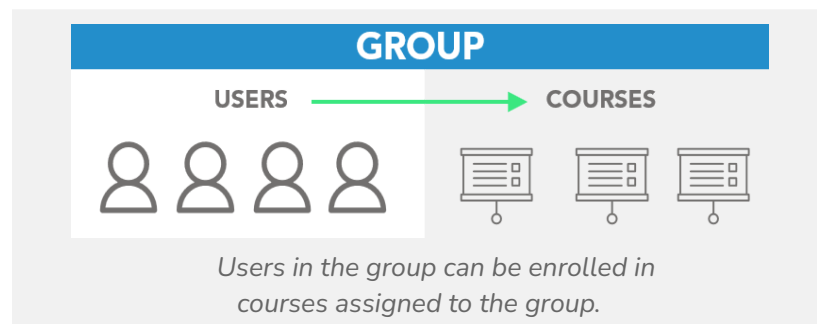
## Plan Your Groups

As you've already learned, groups are one of the primary ways to organize your training — including users and courses. Groups serve two key purposes:

1. They provide a way to assign courses to users.
2. They can be used to grant permissions within the system.

### Assigning Courses Through Groups

As we mentioned earlier, when you add a course to a group, you're allowing users in the group to be enrolled in the course.



You can control a number of different settings for how a group's enrollments are handled. One option is to have SmarterU [automatically enroll a group's users in a course](#). This is useful in situations where you want to make sure that every user in a group is enrolled in a course. For example, you might want all users added to the Manufacturing group to be automatically enrolled in the Workplace Safety course. All you need to do is enable enrollment automation for the group's course, and SmarterU will process the enrollments for you.

Therefore, when planning your groups and courses, think about whether all users in the group should be automatically enrolled in a course. If so, you'll probably want to enable auto-enroll for the course.

If there's a reason you don't want all of the group's users to be automatically enrolled, you'll need to consider whether you want to [manually enroll](#) users, or if you want to give users the ability to [self-enroll](#) through the learner interface.

## Granting Permissions with Groups

One of the key considerations when planning your groups is thinking about who can view or manage records in your account. Groups are one of the key methods for controlling this access.

[Group permissions](#) give users access to advanced functionality. Granting a user a group permission lets that user perform specific functions for the group. For example, granting a user the Create Course group permission lets that user add new courses and assign courses to the group.

You should take some time to review the available [group permissions](#) and what they allow users to do.

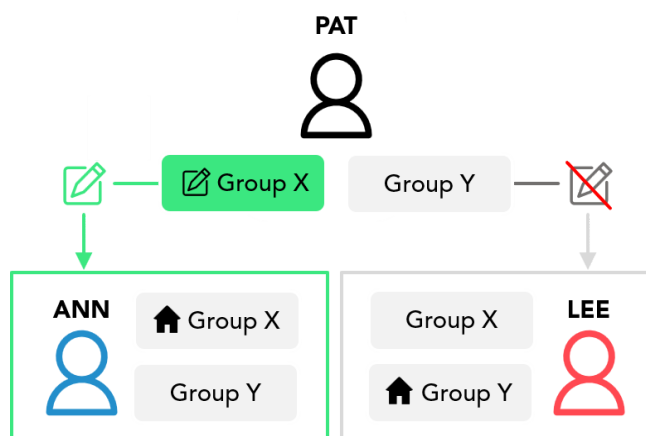
As part of the process for planning your groups, start thinking about which users might need permissions for the group. For example, should managers within a group be able to view information about other users in the group?

You'll assign group permissions when you add your users. If you need to grant global permissions, you'll want to use [account permissions](#) instead.

Course SU-110 in the [SmarterU Academy](#) is dedicated to permissions.

Although users can be assigned to multiple groups, each user is assigned one and only one [home group](#). A user's home group controls who can view and edit the user's information, including their profile and enrollments.

For example, Pat has an editing permission (specifically, the Manage Users permission) on group X which happens to be Ann's home group. Therefore, Pat can edit Ann's user profile. However, Pat does not have that permission on group Y, which is Lee's home group. Pat won't be able to edit Lee's user profile.



## Planning Considerations

One of the most important decisions you'll need to make for your implementation is how you want to structure the groups in your account. Below are some questions you'll want to consider.

- How is your organization structured? Oftentimes groups in SmarterU mirror your company's job functions, departments, and/or locations. Is your organization structured by department or functional area? Physical location? Or, is it a hybrid?
- Will your training be delivered to a specific department? Or, does your training tend to be specific to a location or role?
- How many groups will users belong to and why? For example, will users need a role-based home group, but also location-based groups for more targeted training?
- How will onboarding training be rolled out? What, if any effect, will it have on the group structure?
- Who will be running reports and who will they need to view information for? For example, will they need to report only on users in their department? Or, will they need to run reports for users in other departments as well?

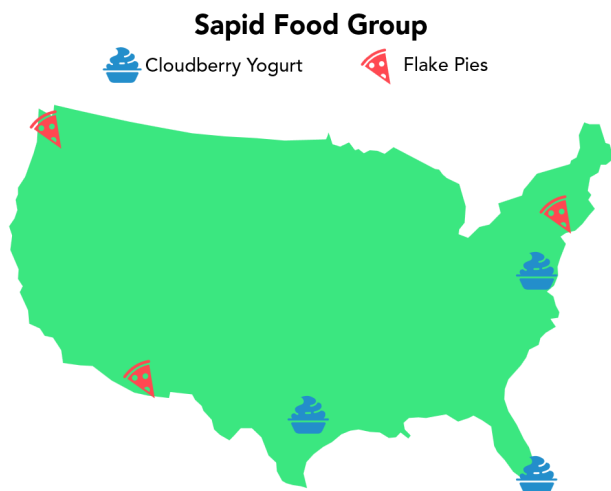
Course SU-100 in the [SmarterU Academy](#) is dedicated to structuring your account.

### Group Example: Sapid Foods

The Sapid Food Group owns two restaurant brands: Cloudberry Yogurt Shops and Flake Pies. Each restaurant has franchise locations across the U.S. which are independently owned.

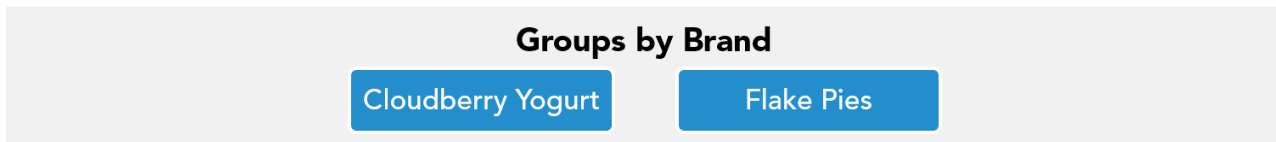
The company wants to provide its franchise owners with training. Some of the training will be common between the two restaurant brands. For example, the Food Safety, Labor Management, and Team Building courses are the same for both Cloudberry Yogurt and Flake Pies.

However, other training will be brand-specific. For example, the Yogurt Dispenser Maintenance course is only applicable to Cloudberry Yogurt franchise owners. Based on this information, the company may want to create a group for each restaurant.

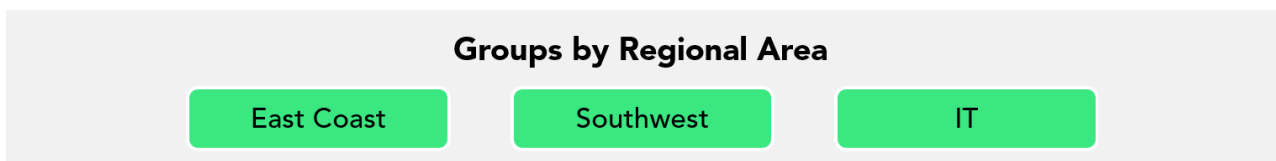


Although none of the training is currently specific to a franchise's location, the franchises are managed by a regional director based on their geographical location. For example, the owners of Cloudberry's Baltimore and Miami locations are managed by Cloudberry's East Coast Regional Director. The owner of the Austin location is managed by Cloudberry's Southwest Regional Director.

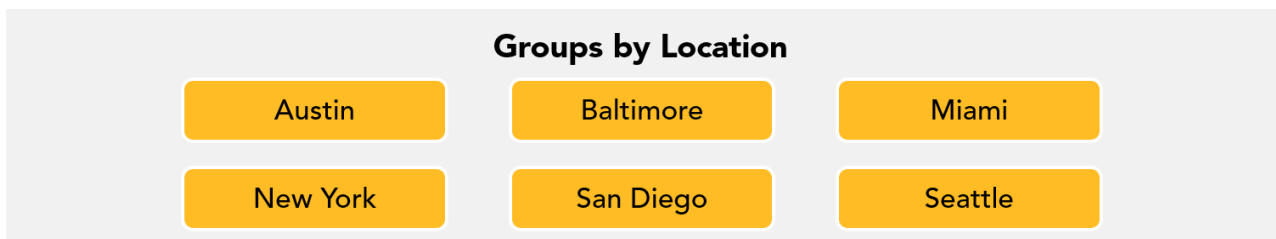
There are several ways to set up the account to support this management structure. The company could create groups for each **brand**.



The company could create groups for each **regional area** (e.g., East Coast, Southwest, etc...).



Or, the company could create a group for each **location**.



Sapid Food Group also has **functional areas** at the corporate level that support all of its restaurants' brands and franchises. Because each of these functional areas will have training that's specific to their department, the company will probably want to create a group for each.



Within each of these functional areas are individuals who will need to track the course enrollments of users in the department. For example, compliance managers in the Operations department ensure that finance managers are taking the necessary courses to stay up-to-date on changing regulations. Although these compliance managers do not directly supervise any users, they will need access to view the course enrollments for all users in the Operations department. Some of the courses that finance managers complete may exist in a different group such as Legal or Accounting.

To support this reporting requirement, SmarterU has *Home Group Reporting*. Compliance managers whose home group is Operations will be able to report on other users whose home group is also Operations.

**REMEMBER:** Although users can be assigned to multiple groups, one of these groups is designated as the user's home group. The home group controls who can view and edit that user's information. For now, you just need to be aware of the concept of home groups. You'll assign home groups when you create users in the [Add Users](#) section and will see an example later in this guide.

## Teams and Organizations

In addition to groups, you can use [teams](#) and [organizations](#) to organize your users. The table below lists which option (i.e., group, team, or organization) will allow you to meet each need.

IF YOU NEED TO:	THEN CREATE A:		
	GROUP	TEAM	ORG.
Give users permission to perform functions for a group	✓	✗	✗
Control what courses, subscriptions, or learning plans users have access to	✓	✗	✗
Control whether users have access to view or edit a knowledge base	✓	✓	✗
Associate users with a third-party entity or specific contact information	✗	✗	✓
Manually enroll users in the entity in courses	✓	✓	✓
Filter reports by the entity	✓	✓	✓

For example, employees from both restaurant brands support and participate in local community events. Although these employees belong to different groups, they're all associated with Sapid's Community Outreach team.

Flax Supermarkets has partnered with Sapid to resell Flake Pies at stores. Flax's business representatives are users in Sapid's account and belong to the Business Partners group. These users are also associated with the Flax Supermarkets organization.

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## Identify Your Users

As another part of your implementation, you'll need to identify the users that you want to add to your account.

Users are the individuals who will be logging in to SmarterU to either complete training, or manage aspects of the system. This includes individuals who will be:

- Taking courses
- Teaching courses (i.e., instructors)
- Grading essay questions (i.e., long answer quiz questions)
- Managing courses and sessions
- Adding or updating groups
- Adding or updating users
- Supervising other users
- Running reports
- Managing the account

The table below lists the different types of users in the system. Refer to [User Access Roles](#) for details on how these user types are created.

USER TYPE	WHAT THEY CAN DO
Learners	Access SmarterU courses through the <a href="#">learner interface</a> .
<a href="#">Supervisors</a>	Oversee the course progress of other SmarterU users. The information that supervisors are able to view will depend on the account's <a href="#">Supervisor Access</a> settings.
<a href="#">Instructors</a>	Manage the instructor-led course session(s) for which they are an instructor.
<a href="#">Graders</a>	Review and grade learners' responses to long answer quiz questions.
<a href="#">Proctors</a>	Run the Proctor Report for online course quizzes that have proctoring enabled.
<a href="#">Course Managers</a>	Manage an online course, report on users, or enroll users. The functionality available to course managers will depend on the account's <a href="#">Course Manager Access</a> settings.
<a href="#">Users with Group Permissions</a>	Manage one or more aspects of the group. The functions they're able to perform for the group will depend on the group permission(s) they've been granted.
<a href="#">Users with Account Permissions</a>	Manage one or more aspects of the account. The functions they're able to perform will depend on the account permission(s) they've been granted.
Administrators	Manage all aspects of the SmarterU account. Administrators have access to all functions. They may add other administrators, but cannot edit the user information for other administrators or owners.
Owners	Manage all aspects of the SmarterU account. Owners have access to all functions. They may add and edit other owners and administrators.

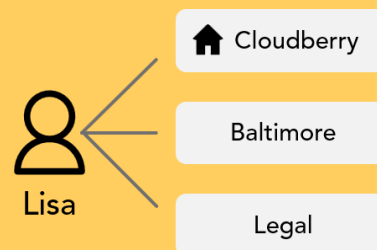


After deciding who needs access to your account, consider the following:

- What [group\(s\) should the user be assigned to](#)? Groups control the courses the user can be enrolled in.
- What group is the user's [home group](#)? Remember that each user is assigned one, and only one, home group.
- What, if any, [group permissions](#) will the user need? Group permissions allow the user to manage one or more aspects of the group. For example, giving a user the View Learner Results group permission for the HR group allows them to report on other users in the HR group.
- What, if any, [account permissions](#) will the user need? Account permissions control what global changes the user can make and what information the user can view at the account level.
- Will the user be an instructor for an instructor-led course? If so, you'll want to give them the [Instructor-Led Training Instructor group permission](#).

### User Example

Lisa is a legal representative for Cloudberry Yogurt Shops who works out of the Baltimore location. Her home group is Cloudberry since that's the brand that she works for. She's also added to the Baltimore group for any location-specific training she might need, and to the Legal group for role-specific training.



## Plan Your Courses

As part of implementing SmarterU, you need to identify the courses that you want to add to your account.

You can add three different course types:

- **Online courses** are developed in and taken through SmarterU
- **SCORM courses** are developed using a third-party product, such as Articulate Storyline or iSpring. The resulting SCORM course package is then uploaded to SmarterU.
- **Instructor-led courses** are taught in a physical location or through a webinar and tracked through SmarterU.

The table below compares the three course types. The considerations for each course type are detailed in the following sections.

	ONLINE	SCORM	INSTRUCTOR-LED
Course is developed with SmarterU's course builder	✓	✗	✗
Course is developed using third-party product (e.g., Articulate Storyline, Adobe Captivate, iSpring, etc...)	✗	✓	✗
Learners take the course through SmarterU	✓	✓	✗
Learners take the course at a physical location such as a classroom	✗	✗	✓
Learners take the course through a webinar provider or URL	✗	✗	✓

All three course types are available in your account, so you can decide which type(s) best suits your needs. In some cases, you may want to deliver the same course in different formats. For example, suppose you want to give learners the option of taking a First Aid course online or in a classroom. In this example, you could create two courses in SmarterU: one that is online and one that is instructor-led.

You can also deliver training in a blended learning environment. For example, suppose you want to offer a CPR course where learners complete the first portion of the course online, then complete the hands-on portion of the course with an instructor. In this example, you'd add the first part of the training as an online course, and the second part as an instructor-led course. You could even set the online course as a [prerequisite](#) to ensure that learners complete it before starting the hands-on portion.

Although it's not necessary for you to add all of your courses at the same time, you must add at least one course in order to complete your implementation. Otherwise, you won't have anything to enroll your users into. You can add a handful of courses now and add others later on.

During the planning phase, you'll also want to identify any individuals who will help you create and manage your courses. When you start building your content, you'll want to create a user account for each of these users and grant them the Group Manager or the Create Course group permission. If there are any users who will help you add content to existing courses, you'll want to make these users [course managers](#) when you add the course.

#### ACTION ITEMS

- Identify the courses — including the type — you want to add.
- Identify individuals who will help you add courses or course content.

## Online Courses

You can create online courses in SmarterU using our [built-in course builder](#). Within an online course, you can include different types of content such as slides, files, multimedia, quizzes, and a variety of activities.

[Learners take online courses](#) through SmarterU and can do so using their desktop computer or mobile device.

Planning the organization of your course's content is an important step in the process. Online courses in SmarterU consist of one or more chapters that contain tasks. [Chapters](#) provide a way to organize your content, and [tasks](#) are the individual pages in your online course.

Before planning your course's content, we suggest that you familiarize yourself with the five task types that you can include in an online course. These task types are:

- [Activities](#) (e.g., flashcard, fill-in-the-blank, gameshow, etc...)
- [Content slides](#)
- [PDFs](#)
- [Quizzes](#)
- [Videos](#)

We recommend that you [storyboard your online course](#) to get an idea of how you want to organize your content. Storyboarding also helps you visualize how your course will look and whether you need to include any media (e.g., images, diagrams).

Below are other considerations when planning an online course:

IF YOU'RE OFFERING AN ONLINE COURSE THAT...	THEN YOU'LL NEED TO...
Will be proctored.	<p>If the course is proctored in-person, identify the users who will be proctors. You'll want to give these users the <a href="#">Quiz Proctor group permission</a> when you create their accounts.</p> <p>If the course is proctored via video, obtain the application ID and API key of the video proctoring service.</p>
Contains a quiz with essay-type questions.	<p>Identify the users who will grade these questions.</p> <p>You'll want to make these users <a href="#">graders</a> for the quiz when you add the quiz to the course.</p>

#### ACTION ITEMS

- Identify the online courses that you'll add.
- Determine the structure of each course.

## SCORM Courses

SCORM courses are developed using a third-party product, such as:

- [Adobe Captivate](#)
- [Articulate Presenter](#)
- [Articulate Storyline](#)
- [Adobe Presenter](#)
- [Articulate Rise](#)
- [iSpring](#)

These third-party products make it possible to build highly interactive and customized training. After developing your course in the product, you'll need to [publish the course](#) to a format that can be uploaded to SmarterU.

If you have an existing PowerPoint file that you want to convert to a SCORM course, you can upload it using [SmarterU's built-in converter](#). The built-in converter does NOT allow you to add additional content, including quizzes, to your course. If you need to add quizzes or other content to your PowerPoint file, we recommend reviewing the options for [converting PowerPoint to SCORM](#).

#### ACTION ITEMS

Identify the SCORM courses that you'll add.

## Instructor-Led Courses

[Instructor-led courses](#) are courses that you offer in a classroom or through a webinar. Each instructor-led course can have one or more sessions that are a specific instance of the course. For example, the CPR course may have four sessions that are offered on different dates.

You can track courses that learners completed prior to your use of SmarterU by adding [historical training](#).

Before you can add instructor-led courses to SmarterU, you'll need to determine if you need to plan for additional setup:

IF YOU'RE OFFERING COURSES ...	THEN YOU'LL NEED TO ...
In a physical location	Identify the <a href="#">venues and rooms</a> where the courses will be held.  You'll want to add these venues and rooms when you configure your account.
Through a <a href="#">webinar provider</a>	Identify the webinar provider(s) you'll be using.  You'll want to add these webinar providers when you configure your account.
That are taught by <a href="#">instructors</a>	Identify the individuals who will be teaching your courses.  If the instructors also have access to your SmarterU account, you can give them the <a href="#">Instructor-Led Training Instructor group permission</a> when you add their SmarterU user profile.

### ACTION ITEMS

- Identify the instructor-led courses that you'll add.
- Identify the venues and rooms where in-person sessions will be held.
- Identify any webinar providers that you'll need to configure.
- Identify who will be instructing your sessions.

## Identify Existing Courses and Content

If you have existing course presentations, handouts, and study guides, you can reuse these materials in SmarterU. For example, PowerPoint presentations can be converted to a SCORM course, or reused in an online course. Existing handouts can be added to online courses in a number of different ways.

We suggest collecting all of the course materials that you currently have and then decide what you want to add to SmarterU. The grid below lists some of the more common course materials and how they can be used.

EXISTING CONTENT	HOW TO USE IN SMARTERU
PowerPoint slides	Use the presentation's content in an online course, or convert the presentation to a SCORM course. Refer to <a href="#">Converting PowerPoint</a> for details on your options.
Speaker notes	Use as the <a href="#">text narration for content slides</a> in an online course.
Handouts	Add as a <a href="#">PDF task</a> or <a href="#">downloadable file in a content slide task</a> .
Forms	Add as a <a href="#">PDF task</a> or <a href="#">downloadable file in a content slide task</a> .
Multimedia files	Add to an online course's <a href="#">content slide task</a> . Refer to <a href="#">SmarterU File Uploads</a> for a list of supported file types.
Videos	Add to an online course as a <a href="#">video task</a> or as part of a content slide.
Learning activities	Add to an online course as an <a href="#">interactive activity</a> such as a fill-in-the-blank, matching, or gameshow. Refer to <a href="#">Activities</a> for a complete list of activities.
Study guides	Add as a <a href="#">PDF task</a> or <a href="#">downloadable file</a> to your online course. You can also create a <a href="#">flashcard activity</a> using the content from your study guide.
Exams or quizzes	Add to an online course as a <a href="#">quiz task</a> .

The content listed above could also be added to your [knowledge base](#) if it's not specific to a course. The [knowledge base](#) is covered in a later section.

#### ACTION ITEMS

Identify the courses and materials that you can reuse.

## Identify Your Reporting Needs

In addition to the features listed above, you'll want to figure out if you need to enable the following reporting permissions. In the following sections, "reporting permissions" is defined as having any of the following:

- The Group Manager or View Learner Results group permission
- The Global Reporting account permission
- Administrator access

Course SU-150 in the [SmarterU Academy](#) is dedicated to reporting.

### Course Manager Access

Should course managers — users who are responsible for adding and managing course content — be allowed to view enrollment information for users in the course(s) that they manage?

If you answered "yes", you'll want to enable the [Course Manager Access setting's Report on Enrollments option](#) for your account. Let's take a look at an example.

Vera is a course manager for the Employee Onboarding course. With the Report on Enrollments option enabled for course managers, Vera can run the Enrollment Report to view the enrollments for users who are enrolled in the Employee Onboarding course and any other courses where she's a course manager.

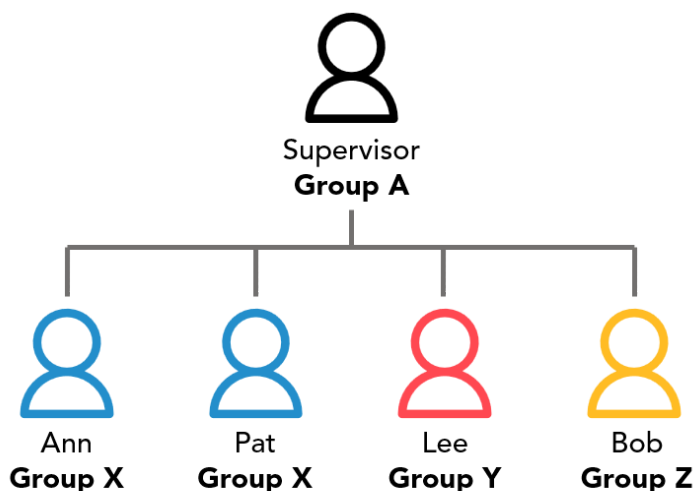
**NOTE:** The Course Manager Access setting also lets you control whether [course managers are able to enroll users in courses](#).

## Supervisor Access

Should supervisors be able to view enrollment information for users that they supervise?

When the [Supervisor Access setting's Report on Supervisees option](#) is enabled, you can allow supervisors to view enrollments for users that they supervise regardless of whether they have account- or group-level reporting permissions (i.e., the Group Manager or View Learner Results group permission). This is helpful when you want to let supervisors view their supervisees' enrollments, but don't necessarily want to grant them reporting permissions on each of the groups that their supervisees belong to. Remember that granting a user reporting permissions for a group allows them to view enrollments for every user in the group; not just the users that they supervise.

For example, let's say a supervisor has employees in groups X, Y, and Z. You want to let the supervisor view their supervisees' course enrollments, but don't want to let them see the enrollments of other users in groups X, Y, and Z. With Supervisor Reporting enabled, you can allow the supervisor to view enrollments for any user they supervise. In this example, Ann, Pat, Lee, and Bob.



**NOTE:** The Supervisor Access setting also lets you control whether [supervisors are able to enroll supervisees in courses](#).

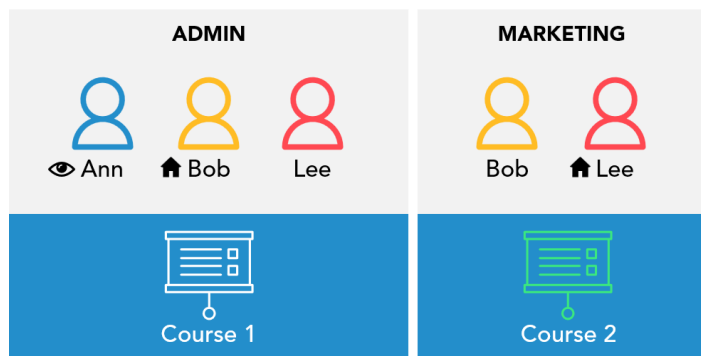
## Home Group Reporting

The [Home Group Reporting](#) functionality enables users who have reporting permissions (i.e., either the Group Manager or View Learner Results group permission) to view all enrollments for the users whose home group is the same as the one where they have reporting permission.



For example, suppose Ann, Bob, and Lee all belong to the Admin group. In addition:

- Ann has the View Learner Results permission on the Admin group.
- Bob's home group is the Admin group and he also belongs to the Marketing group.
- Lee also belongs to the Marketing group and it's his home group.



Now suppose that Bob and Lee are both enrolled in course 1 and course 2.

IF HOME GROUP REPORTING IS ...	THEN ...
Off	<p>Ann will see Bob and Lee's enrollment in course 1 because she has reporting permission on the group where the enrollments occurred (i.e., group X).</p> <p>However, Ann won't see any enrollments for course 2. This is because she doesn't have reporting permissions for the group where course 2 is enrolled (i.e., group Y).</p>
On	<p>Ann will see Bob and Lee's enrollment in course 1 because she has reporting permission on the group where the enrollments occurred (i.e., group X).</p> <p>Ann will also be able to see Bob's enrollment in course 2. With Home Group Reporting enabled, she'll be able to view enrollments for users whose home group is the one where she has reporting permission, regardless of the group where each enrollment occurred.</p>

#### ACTION ITEMS

Identify individuals who will need to report on course enrollments and the scope of their reporting needs.

# Identify Your Account's Needs

SmarterU is a highly customizable system with many features to meet your needs. The table below describes some of the features that are available.

**NOTE:** Some of these features may only be available to certain plans. Contact [support@smarteru.com](mailto:support@smarteru.com) for more information.

IF YOU WANT TO ...	THEN YOU'LL NEED THIS FEATURE ...
Track learners' progress for completing recurring training, or a series of courses and actions	<a href="#">Learning Plans</a>
Customize the logo and messaging for each group	<a href="#">Home Group Branding</a>
Allow users access to SmarterU through a third-party system	<a href="#">External Authorization</a>
Sell your courses through a third-party site such as 1ShoppingCart, Magento, PayPal, or Shopify	<a href="#">eCommerce</a>
Control the number of enrollments	<a href="#">Credits</a>
Provide users the ability to communicate with other users	<a href="#">Discussion Forums</a>
Track licenses issued by other entities	<a href="#">Licensing</a>
Provide learners with incentives for taking or completing courses	<a href="#">Points and Rewards</a>
Offer a bundle of courses as part of an enrollment	<a href="#">Subscriptions</a> <i>Subscriptions are often used with the eCommerce feature.</i>
Calculate the total cost of your training	<a href="#">Training Cost Reporting</a>
Use SmarterU's application program interface (API) to create or edit objects such users and groups	<a href="#">API</a>

**NOTE:** Contact [support@smarteru.com](mailto:support@smarteru.com) to learn more about these features.

# Plan Your Knowledge Base Organization and Content

The knowledge base is a repository within SmarterU where you can store information that is separate from courses. It's useful when you want to provide job aids and supplementary materials, or content that may not be specific to a single course. Within a knowledge base, you can create folders, articles, and files. You can also control who has access to view and edit the knowledge base's content.

You are not required to configure your knowledge base and its contents during the initial implementation phase, but it is helpful to consider the following:

- What content do you want to include in your knowledge base?
- Do you have existing files that you can add to your knowledge base?
- How do you want to organize the content in your knowledge base?
- Who should have access to view and edit the knowledge base's content? Will you grant access to the content by group, or individual users? Or, will it be based on other associations such as the learning plan or team that users belong to?
- Should knowledge base content be available outside of SmarterU?

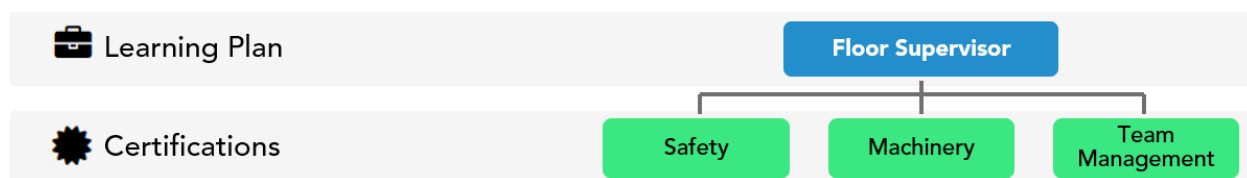
Course SU-160 in the [SmarterU Academy](#) is dedicated to the knowledge base.

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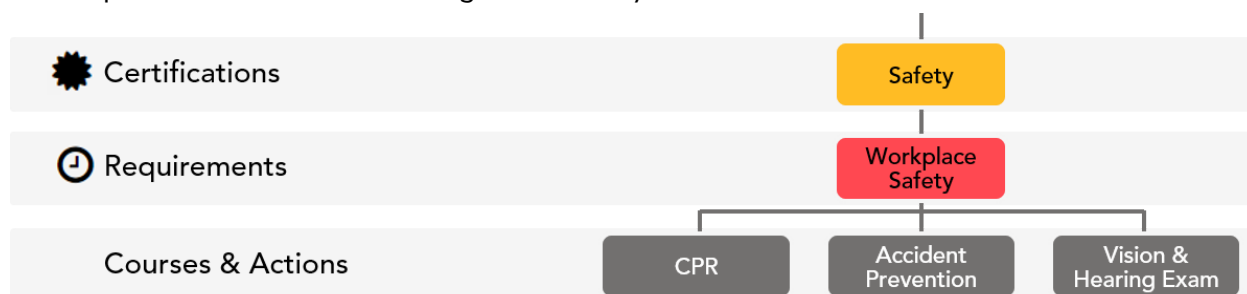
## Identify Your Learning Plans

If you have an [Enterprise](#) account, learning plans provide a way to deliver a series of courses to your users. Learning plans are often used for recurring training. For example, you may require learners to complete courses on your company's security practices annually. They can also be used to track whether users meet compliance standards that demonstrate the competencies required by their role or job function.

Each learning plan contains one or more *certifications*. Certifications are the competencies that a user must demonstrate as part of their job or position. If you decide to use learning plans, you'll need to consider if learners need to be recertified on a recurring basis. For example, floor supervisors might be required to show competence in areas related to safety, machinery, and team management each year.



Within each certification are one or more *requirements*. Each requirement contains the criteria that the user must complete to earn their certification. These criteria can include courses that the user must complete, or actions that they need to take. In our example, the Safety certification includes the Workplace Safety requirement. To satisfy this requirement, floor supervisors must complete the CPR and Accident Prevention courses annually. They must also submit proof of a vision and hearing exam each year.



Learning plans make it easy for you to see if a user has failed to complete any courses or actions. If they do not complete any courses or actions, their certification will show a status of *Not Met* throughout the system. In situations where a user needs to complete a course or action on a recurring basis, learning plans also provide visual notification that a user is nearing the date when they need to re-complete any courses or actions.

Refer to [Learning Plans](#) for more details on learning plans.

	Manufacturing Management
	Forklift Operation
	Conveyor Belt Operation
	Met
	Warning
	Not Met
	Expired
	Not Enrolled

Course SU-200 in the [SmarterU Academy](#) is dedicated to structuring learning plans.

### ACTION ITEMS

- Identify the learning plans you want to create.
- For each learning plan, identify the certifications that demonstrate a user's competence.
- For each certification, identify the requirements. These are the courses and actions that a user must satisfy to complete a certification. When you add your learning plans and its structures, you'll want to make sure the courses and actions are added before your requirements.

# Configure Your Account

SmarterU is highly customizable and has a number of configuration settings that you can change to meet your needs. While you don't have to configure every setting available, there are a handful of account settings that you'll want to pay attention to during your implementation. These settings are described below.

## Specify Account Settings

Below are the account settings that were discussed previously in this document:

- [Home Group Reporting](#)
- [Supervisor Access](#)
- [Course Manager Access](#)
- [Webinar Providers](#)
- [Proctoring Services](#)

You can change any of these settings from the admin interface.

## Brand Your Account

SmarterU is a highly customizable system. Some of the elements you can customize include the following:

- [Account logo](#)
- [Themes](#)
- [Portal login page](#)
- [Online course footer](#)
- [Online course template](#)
- [Course completion certificate](#)

Refer to our help system for [account branding samples](#).

## Add Your Groups

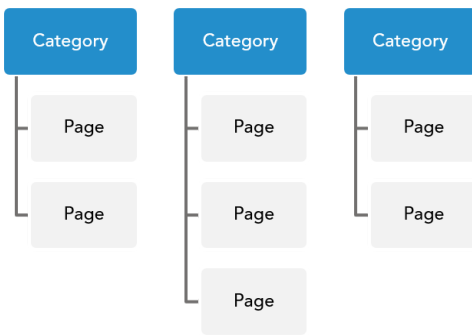
When you [add your groups](#), you'll need to make sure that each group has a unique name. You'll assign users and courses to your groups at a later time



### ProTip

We recommend that you also add a test group that you can use to evaluate new content. This allows you to assign a new course you've developed to the test group so that you can review the course before assigning it to other groups. It also prevents users outside the test group from being enrolled in the course until you've completed your review.

## Dashboard Set

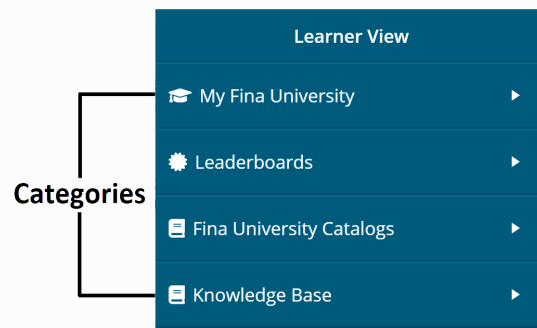


## Plan Your Learner Dashboard Sets

A *dashboard set* is a named configuration that controls what's displayed on the learner-side interface — the Learner Dashboard. Each dashboard set contains one or more *categories* (i.e., menus) that contain *pages* (i.e., screens with information).

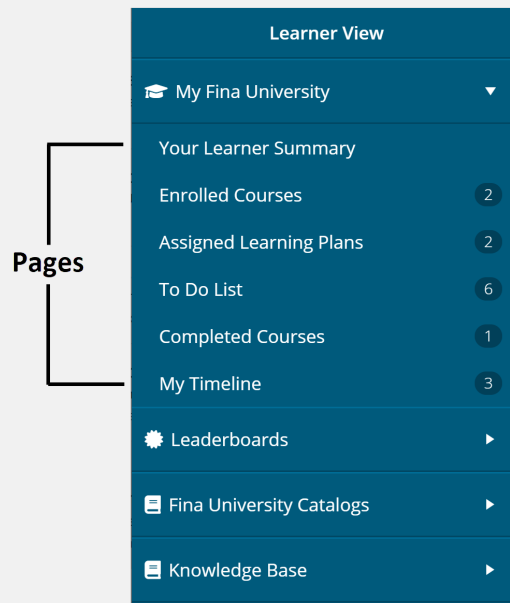
Let's look at a sample dashboard set, shown to the right. This dashboard set has four categories:

- My Fina University
- Leaderboards
- Fina University Catalogs
- Knowledge Base



Within the My Fina University category, there are six pages:

- Your Learner Summary
- Enrolled Courses
- Assigned Learning Plans
- To Do List
- Completed Courses
- My Timeline



SmarterU includes a default dashboard set. However, you can create custom dashboard sets and assign them to users in selected home groups. A custom dashboard set is useful in situations where you want to provide users in a group access to content that other users might not need. For example, you may want to include a course catalog for groups that are allowed to self-enroll in training.

Refer to [Adding a Dashboard Set](#) for details on creating custom dashboard sets for your account.

#### ACTION ITEMS

Identify any groups that may need a custom dashboard set.

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## Configure Your Emails

SmarterU has a robust library of [system-generated emails](#). Using the [Email Management Dashboard](#), you can create custom email templates, change an email template's text, or add information using any of the available variables.

You can also control which email templates are used by default for your account, or set templates to be used on a case-by-case basis.

If you want to change any of the default email templates used for the account, you'll want to select the template(s) from the [Email Template Options accordion](#) of the Account Profile workscreen.

**REMEMBER:** You can also customize emails for specific courses and users.

Certain system emails have configuration settings that allow you to control whether the email is sent or who it is sent to. For example, you can control whether the Account Invitation email or Weekly Email to Learner emails are sent.

#### ACTION ITEMS

Identify the email templates that you want to customize.

# Build Your Content

In order to complete your SmarterU implementation, you'll need to create both users AND courses in your account. The order in which courses and users are created is up to you.

## Add Users

Every person accessing SmarterU should have their own user profile. When adding users, be sure to have the following for each user:

- First and last name
- Email address or employee ID

You should also have an idea of the following:

- Groups you want to assign the user to
- Group you want to assign as the user's [home group](#)
- Any group permissions the user will need
- Any account permissions the user will need
- [Learning plans](#) you want to assign to the user

SmarterU provides several options for adding users to your account. You can [manually add each user](#) from the User Profile workscreen. The User Profile workscreen enables you to specify all details for your users.

Another option is to [enable the Quick User Add feature for the account](#). [Adding users from the Quick User Add workscreen](#) allows you to enter a minimum amount of information to create a user.

The third option for adding users to your account is through a [user import](#) using a comma-separated (CSV) file. This option might be ideal if you are able to export user information from an existing system to a CSV file, or if you are creating a large number of user accounts. Because there is no way to stop a user import, be sure to [read and understand each step in the process](#) before attempting a user import.



ProTip

You can also create users using [SmarterU's API](#), or through a [user sync integration](#) with an external system such as Active Directory, HRIS, or other systems. For more information, contact [support@smarteru.com](mailto:support@smarteru.com).



Course SU-115 in the [SmarterU Academy](#) is dedicated to creating users.

If you are giving a user group or account permissions, you may want to [log in as the user](#) to make sure that they have access to the menus that you'd expect. This might be especially helpful for the first few users that you create with group or account permissions. After you have a better understanding of the various permissions and what they allow a user to do, you probably won't need to do this.




#### ProTip

We recommend that you add at least one, non-admin test user that you can use to evaluate your account's setup and your courses. You can assign this user to your test group and enroll them in courses without affecting an actual user's enrollment record or activity log.

You may also want to temporarily disable email notifications for all users except your test user until after you've completed your pilot. Disabling email notifications for users prevents them from getting account invitation and enrollment emails.

# Add Courses

When you're ready to add your courses, there are a few things you'll want to consider. The following apply to all course types (i.e., online, SCORM, and instructor-led).

<b>Course Managers</b>	Which users will help update the course's settings or content? You'll want to specify these users as <a href="#">course managers</a> for the course.
<b>Groups</b>	<p>Which groups should have access to the course? You'll want to <a href="#">assign these groups to the course</a>.</p> <p>You can also assign courses to groups <a href="#">by updating the group</a>.</p>
<b>Prerequisites</b>	Are there other courses that must be completed before a user can enroll in the course? If so, you'll want to assign those courses as <a href="#">prerequisites</a> .
<b>Course Image</b>	<p>Although it's not required, you can upload an image for each course. This image displays on various dashboards throughout the system and in the learner interface. Refer to <a href="#">SmarterU File Uploads</a> for the image's specifications.</p> <p>If you choose not to upload an image for a course, the default course image will display (shown right).</p> 
<b>Learning Plans</b>	If you plan to use learning plans, which learning plans will the course be assigned to? Will users have the option to choose between different courses? For example, will they have the option to take an online version of a course or one that's offered in a classroom? Refer to <a href="#">Learning Plans</a> for more details.

In the next few sections we'll take a look at the three different course types. Remember that you don't have to use all three types, but that you have the option to use the ones that are best for your training.

## Add Online Courses

When you're ready to [add an online course](#), there are a number of settings available for each course. Some of these settings are discussed above. Other settings such as how the course is

graded, when the course is due, and whether learners can access the course after they complete it are described in detail in our [help system](#).

After you've added an online course, we strongly recommend that you enroll a test user in the course. This lets you take the course just like a learner would so you can get a true feeling for the learner's experience. It also gives you an opportunity to identify any errors or content changes that you want to make before making the course available to your learners.

Course SU-120 in the [SmarterU Academy](#) is dedicated to creating online courses.

*Interested in giving all of your online courses a similar look and feel? If so, SmarterU's design team can help you create [custom templates for your online courses](#). For more information on custom templates, contact [support@smarteru.com](mailto:support@smarteru.com).*

## Add SCORM Courses

Before you create a SCORM course in SmarterU, you'll first need to publish your course as a SCORM file from the third-party product that you used to create it. The steps for publishing your course will depend on the product. Refer to [Publishing SCORM Courses](#) for details.

When you have the .zip file for your course, you'll need to create the SCORM course in SmarterU and [upload the file](#) to the course. For details on other settings that are available for SCORM courses, refer to [Adding a SCORM Course](#).

Just like you did for online courses, we recommend that you enroll a test user in your SCORM course. With SCORM courses, you'll want to evaluate not only the course's content, but also whether your test user's progress and completion are properly configured.

Course SU-125 in the [SmarterU Academy](#) is dedicated to creating SCORM courses.

*Need help developing your SCORM courses? Our [Flare Learning team](#) can help. Contact [support@smarteru.com](mailto:support@smarteru.com) for more information.*

## Add Instructor-Led Courses

Before you start adding your instructor-led courses, determine if there are other configuration steps that you need to complete. To review what we discussed in a [previous section](#):

IF YOU'RE OFFERING COURSES ...

THEN YOU'LL NEED TO ...

In a physical location	<p>Identify the <a href="#">venues and rooms</a> where the courses will be held.</p> <p>You'll want to <a href="#">add these venues</a> and <a href="#">rooms</a> when you configure your account.</p>
Through a <a href="#">webinar provider</a>	<p>Identify the webinar provider(s) you'll be using.</p> <p>You'll want to <a href="#">add these webinar providers</a> when you configure your account.</p>
That are taught by <a href="#">instructors</a>	<p>Identify the individuals who will be teaching your courses.</p> <p>If the instructors also have access to your SmarterU account, you can give them the <a href="#">Instructor-Led Training Instructor group permission</a> when you add their SmarterU user profile.</p>

After you've completed any additional configuration steps, refer to [Adding an Instructor-Led Course](#) for a detailed description on the available course settings.

If you know the dates and times your instructor-led course will be offered, you can [add sessions](#) with these details. The session is also where you'll specify the instructor(s), and whether the session is in-person, a webinar, or some other format.

Course SU-130 in the [SmarterU Academy](#) is dedicated to creating instructor-led courses and sessions.

## Add Your Learning Plans and Its Structures

When adding learning plans, certifications, and requirements to your account, we recommend adding the content from the bottom up to ensure that child objects that will be assigned have already been created. For example, because requirements are assigned to certifications, you'll want to add the requirements **before** the certifications.

Below is the order that we recommend adding your learning plan content:

1. [Add the courses](#) that are going to be associated with any requirements.
2. [Add the actions](#) that are going to be associated with any requirements.
3. [Add a requirement](#) and [assign courses and actions](#) to it.
4. [Add a certification](#) and [assign requirements](#) to it.
5. [Add a learning plan](#) and [assign certifications](#) to it.

The table below lists other configuration settings you may want to consider for your learning plans.

IF YOU WANT TO...	THEN YOU SHOULD ...
Brand your certification completion certificate or include specific information on it	<a href="#">Customize your certification completion certificate</a>
Automatically enroll users in courses associated with learning plans that they are assigned	<a href="#">Enable auto-enroll for the learning plan's courses</a> and <a href="#">enable learning plan automation</a>
Allow users who are assigned a learning plan to self-enroll in the learning plan's courses	<a href="#">Enable self-enroll for the course</a>
Allow users to self-enroll in a learning plan	<a href="#">Enable self-enroll for the learning plan</a>
Allow users to view the status of their learning plans in the learner interface	<a href="#">Add a learning plan page to a dashboard set</a>
Prevent users from being enrolled in a learning plan's course unless they are assigned the learning plan	<a href="#">Enable the learning plan lock for the course</a>

Courses SU-200 and SU-210 in the [SmarterU Academy](#) are focused on structuring and using learning plans.

# Conduct and Analyze a Pilot

We strongly recommend a phased rollout where you control the number of users that you invite to your SmarterU implementation. You should think about how you want to conduct your phased rollout. For example, maybe you want to invite a select set of users or certain groups.

You can use the feedback that you receive from your pilot users to tweak your implementation and address any issues before inviting additional users. Your pilot may provide insight into enrollments that you might want to automate, or courses that need to be assigned to groups.

We recommend allowing users who are not familiar with SmarterU's interface to review the implementation from a learner's point of view. Their review could shed light on emails that you want to customize, dashboard sets that you need to create, or permissions that users are missing. A pilot also gives you a chance to review your training content before you start enrolling users.

As mentioned earlier in this guide, you can automate enrollments or manually enroll users. You can also have SmarterU recommend courses that you might want to enroll users in based on the groups, learning plans, or subscriptions that are assigned to them. Refer to [Enrollments](#) for information on the kind of enrollments that are available.

Course SU-140 in the [SmarterU Academy](#) is dedicated to enrolling users in courses.