

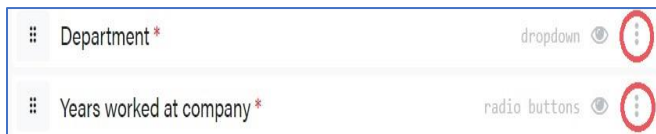
QuickStart Sheet: Key Functions in the New DigitalChalk

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General Site Navigation Tips

- **“Create” menu:** For when you are creating or editing learning interactions for learners. Courses, Offerings, Notifications and more
- **“Lead” menu:** For all activities related to User Management. User creation and editing, Grading, Registrations and more
- **“Reports” menu:** Home for all Reports. As noted, this were no meaningful changes to this in the release.
- **Kabobs and Action bars.** To quickly do something to an object, click on the “kabob” in the right-hand side, or the arrow in the Action bar at the bottom of the page.

Kabobs:



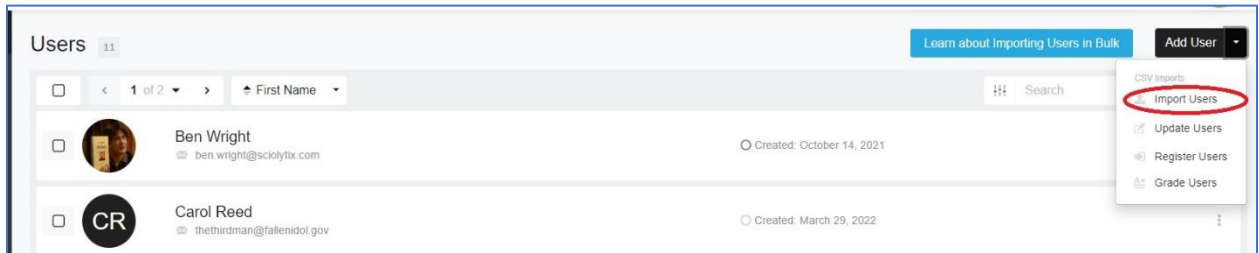
Action Bars:



Specific Function Walkthroughs

Adding New Users

- Click on “Lead” in the Left-Hand Menu
- Click on “Users”
- To add one user, click on “Add User”.
- To do a bulk upload of users using a .csv file, click on the arrow adjacent to “Add User” and Select “Import Users”

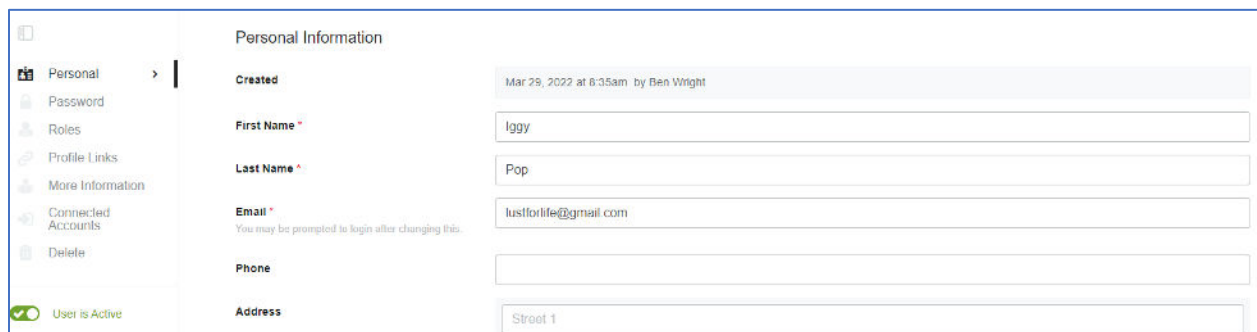


Video link: [Importing and Managing Users Training Segment](#)

(Please note: The video links in this document are segments of larger training videos, put in to provide a bit more context. In most every instance, the relevant segment is under 30 seconds, and the video can be closed)

Adding Supplemental Information for Users/ Editing Existing Users

- Click on “Lead” in the Left-Hand Menu
- Click on “Users”
- Select the given User for whom you want to add in Supplemental Information or edit
- The menu on the left shows the edit or Supplemental Information items available. The most commonly-used user data areas are “Personal Information,” “Roles,” and “More Information.”



Video Link: [Editing Users Training Segment](#)

Creating a Course

- Click on “Create” in the Left-Hand Menu
- Click on “Courses”
- Select “Add Course” in the top Right hand corner

- Fill out the appropriate information for your new course, and select “Save Details.” You have now created a Course.

Video Link: [Courses Training Segment](#)

Adding New Content/Adding a SCORM file

- Click on “Create” in the Left-Hand Menu
- Click on “Courses”
- Select the Course to which you want to add content
- Select “Elements” in the menu to the left side

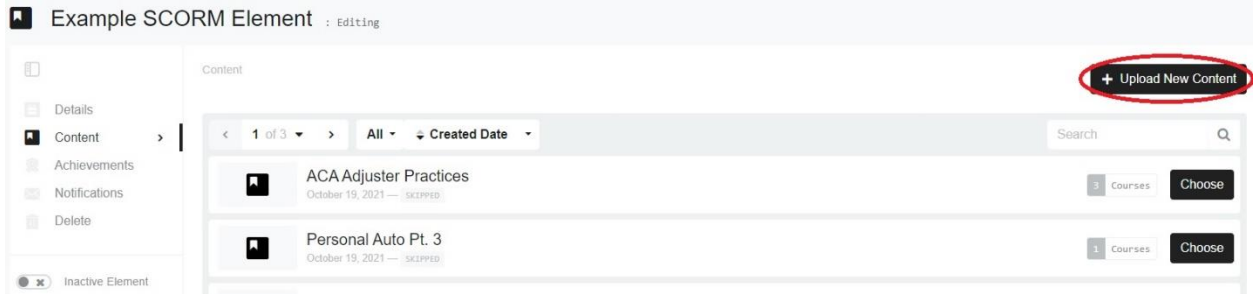
The screenshot shows a course configuration page. On the left, a vertical menu contains options: Details, Authoring, Completion, Grading, Achievements, Delete, Preview, and Elements. The 'Elements' option is highlighted with a red circle. The main area is titled 'Details' and contains several form fields: 'Title' with the value 'Sample Course', 'Instructor' with 'Brett Trainor', 'Passing Grade' with '100' and a percentage sign, 'Delivery Type' with a dropdown menu set to 'One Element at a Time', 'Visibility' with a dropdown menu set to 'Show all elements, even if not yet available', 'Review Period' with a dropdown menu set to 'Until Course Completion', and 'Tags' with a '+ Tag' button. A small informational note is visible below the 'Delivery Type' field.

- On the subsequent page, select “Add Element” in the top right-hand side of the page
- At this point, the various Element types will appear.

The screenshot shows a grid of element type options under the heading 'Choose an Element Type'. The options are: Assignment (highlighted with a blue box), Certificate, Chalkboard, External Site, File, Instructor Led, Learning Package (with a red gear icon), Survey, and Test (with a blue checkmark icon).

- To add in SCORM, xAPI, AICC or WebArchive elements, select “Learning Package”
- Complete the requested information on the following page and select “Save”

- On the next page you can select from existing content, or add in new SCORM, AICC, xAPI or WebArchive content by selecting “Upload New Content.”

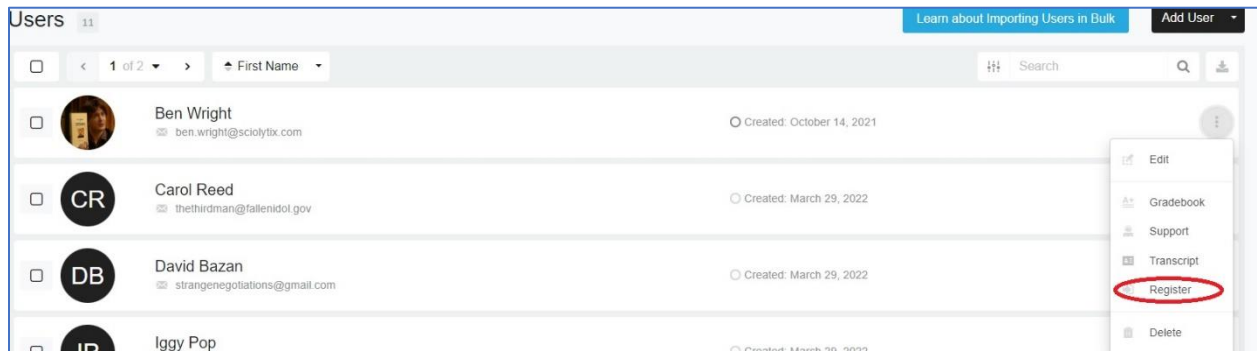


Video Link: [Elements Training Segment](#)

Assigning People to Classes (Registering Users)

(Please note, there are many ways to do this, but this approach is quite simple for new users)

- Click on “Lead” in the Left-Hand Menu
- Click on “Users”
- Find the User(s) you want to register into a given course, click on the kabob and select “Register”



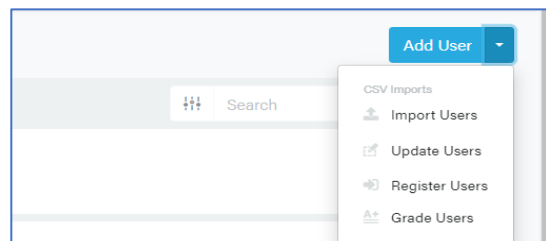
- On the next screen, you will choose the course into which you register the user(s), and you can select whether to notify them upon registration.

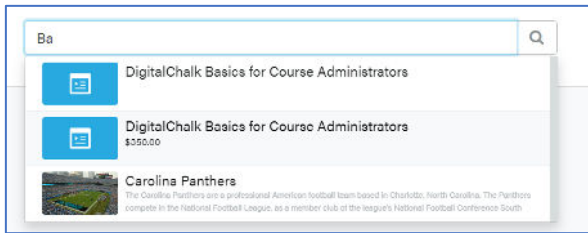
Video Link: [Registering Users Training Segment](#)

Assigning People to Classes (Registering Users) in Bulk

(Again, there are many ways to do this. This approach shows a different path to demonstrate the flexibility in the new UI)

- Click on “Lead” in the Left-Hand Menu
- Click on “Users”
- In the top right hand corner, click on the arrow next to “Add Users”
- Then select “Register Users”





- On the next screen, type in the first few letters of the course into which you want to bulk register users, and select the course when it comes up underneath the text box.

- Then click on “Upload”, and upload your .csv file of users you are registering. At minimum you need to have email address. If you have users with common email addresses, then you need to add in other fields to identify each user.
- On the final screen, you will map the fields in your file to your user fields, and your file will be processed.

Video Link: [Registering Users in Bulk Training Segment](#)

Adding Notifications

- Click on “Create” in the Left-Hand Menu
- Click on “Notifications”
- On the next screen, you can select on an existing notification to make changes, or you can create new notifications by selecting “Add”
- If you select “Add” you can select from a long list of common notifications.
- Each notification has three components: Information, Condition, and Consequence.
- After you have completed filling in the fields, click “Save”

Please note: The first time you create a notification can be a bit overwhelming, but notifications are a powerful and useful tool for managing users. If you are feeling unsure, please contact our support team who can walk you through the process at Support@digitalchalk.com

Video Link: [Notifications Training Segment](#)

Learning Paths and Rules

Please note: *There are a number of ways to build learning paths in DigitalChalk. This is the most common approach, but please reach out to our support team with questions or recommendations as you build out your initial learning paths.*

Most Learning Paths are based on user attributes; particularly role, location and language. This method assigns all courses at once, but there are sequential alternatives to this.

- Click on “Manage” in the Left-Hand Menu
- Then click on “Catalog”
- Click on “Add” in the top right hand corner
- Select “User Field – Offering”*

Add New Catalog Rule

Add Remove Advanced

User Tag - Offering
This rule will allow you to add a specific offering for users that have a specific tag.

User Tag - Offerings with Tag
This rule will allow you to add all offerings with a specific tag for users that have a specific tag.

User Address - Offering
This rule will allow you to add a specific offering for users that have a matching address field.

User Field - Offering
This rule will allow you to add a specific offering for users that have a specific value for a user field.

User Field - Offerings with Tag
This rule will allow you to add all offerings with a specific tag for users that have a specific value for a user field.

User Address - Offerings with Tag
This rule will allow you to add all offerings with a specific tag for users that have a matching address field.

User Team - Offering
This rule will allow you to add a specific offering for users that are in a specific team.

- **Note:** Offerings are the “wrappers” around courses, or groups of courses, that allow users to register for courses.
- In this example, we will pick a Learning Path designed for Employees with Role = Warehouse Operator in the Midwest Region

- On the following page give a name to the Catalog Rule

Information

Name * 2023 Spring Learning Path - Warehouse JS in Midwest Region Course

Active

Schedule Only Available During Set Date

Then Select the Conditions for the rule (Role = Warehouse Operator, Region = Midwest)

Conditions

All Conditions Match

:: User Field: Role Warehouse Operator

:: User Field: Region Matches Midwest Case Sensitive

Add Condition

Finally, Select the Consequence of entering the user into the Offerings you would like to have assigned to them. After you enter each offering, click “Add Consequence” until you have all the offerings for the learning path. Then click “Save”

Consequences

:: Add Offering DigitalChalk Basics for Course Administrator

:: Add Offering Troy All Elements Course

:: Add Offering Quickly and Easily Create Your Courses

Add Consequence