# Quick guide: Getting started Manager/admin guide

This guide will help a new training manager get started using the Infuse 4.1 Learning Management Console. The first step you should take would be to create a new community.

## Creating a new community/registering for the first time:

1. To create a new account, go to https://ssl.xerceo.com, and press the Create a Private Community button. Everyone registering gets one! You don't have to use it but it's a great space to put all your training and even create something new yourself and share with colleagues.


2. Fill out the registration pop-up


3. A key option to decide on is whether you wish to "Charge for each piece of training individually", or "Purchase unlimited access per-user". Please see Xerceo Pricing for more details.
4. Once you've decided, fill out the rest of the form, and press the Create Community button.

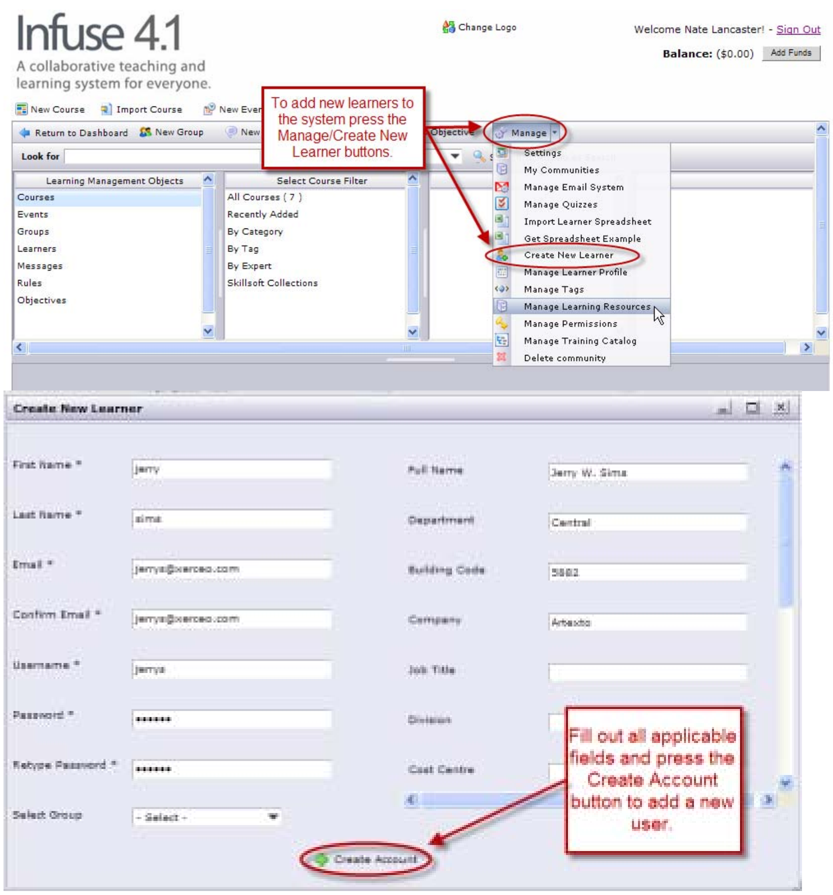
5. Confirm your choices in the confirm window.
6. Now press the link that's sent to your email to activate your account. Although tempting to skip this step, you can't sign in without doing this last step.

Once you have signed in you will see the Dashboard. This is where your clients or employees will access content that you or others have created. To add users to the system or to create courses, among many other things, you will need to go to the Administration Console. Just press the Administration button.

# Administration Console

The Administration Console enables you to add users, create content, import content, assign permissions, and much more.

## Adding Users




## Importing Courses

Administrators can import Skillsoft and SCORM courses directly from the Administration Console. To do this, first press the Import Course button. This will open the Skillsoft or SCORM import wizard.

1. The first step is the Import Content Package. Select a SCORM content package to import or search for and select a SkillSoft course. You must import the course before moving on to the next step. Browse for SCORM content from your computer and open it. When you have finished press the Next button.

2. Step two is Describe Course. Here you must provide an informative title, description, and tags to describe this course. These values help learners locate the course in the portal. Default values are read from the Learning Object Metadata (LOMv1.0) in your content package, if available. You can also add a Thumbnail Graphic here. Press the Next button when you have finished.

3. In step three you can configure the display settings. Here you can fine tune how this course will be displayed in the portal. You can adjust Launch Window dimensions, position, properties, and frames, which include the Course outline, navigation toolbar, and the certificate of completion. When you are done press the Next button.

4. This step allows you to determine which users of your system can access this online course. Guest access allows non-authenticated users to take the course. Here you can also select training catalog category you wish to store this course in. When you are finished, press the Next button.

5. Publish Course, is the final step. Here you can set the cost of the course, assign the course to specific Groups or a training automation rule, and choose whether or not to store the course in the CMS. Select yes, to store this Course inside the CMS. Press the Finish button to publish this course. After you select “I’m Done”, you will return to the Administration Console

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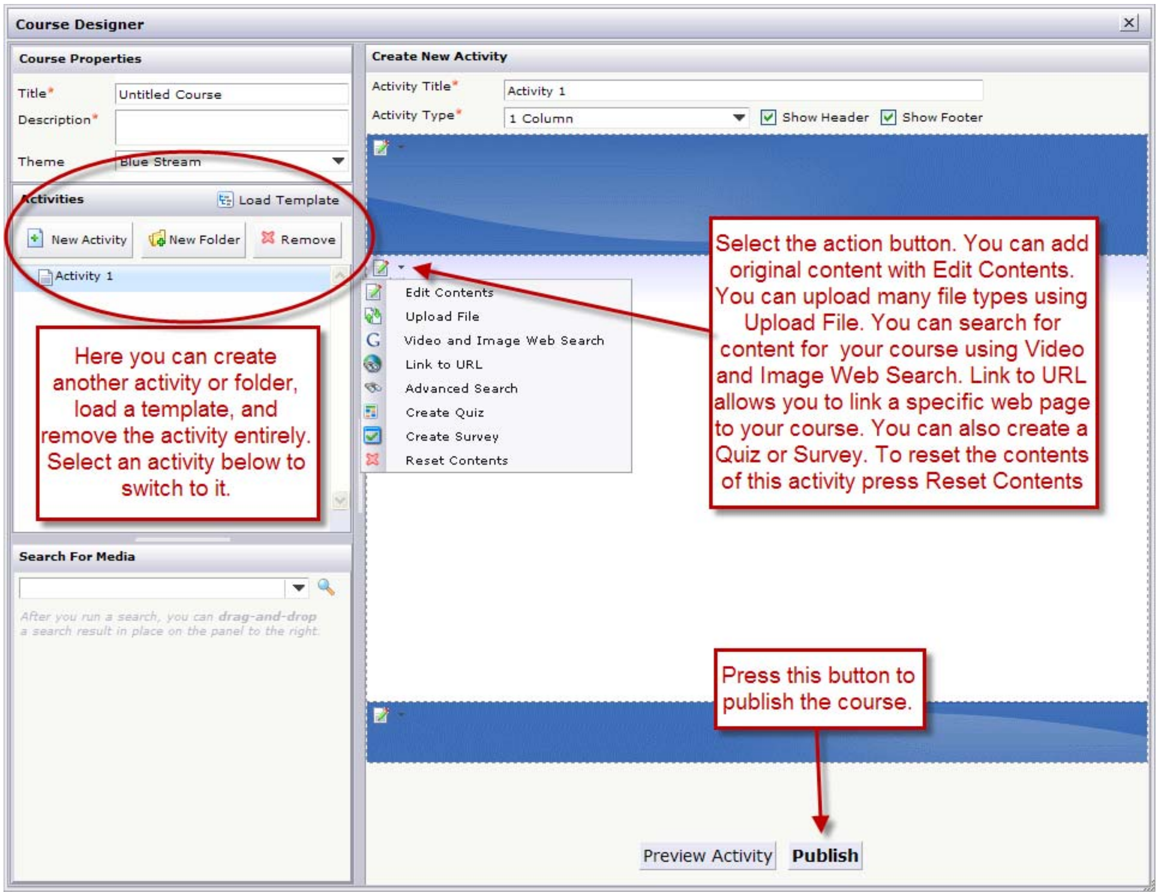
## Creating Courses

To begin creating an online course with infuse, press the New Course button. Here you will see the course designer. First, give your course a title, add a description, and Name the Activity.

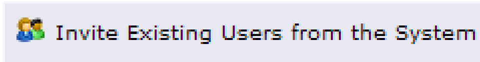



In the Publish Settings you will want to select a course category, set the window settings if desired, and set up security constraints. Press the **Finish** button when you are finished.

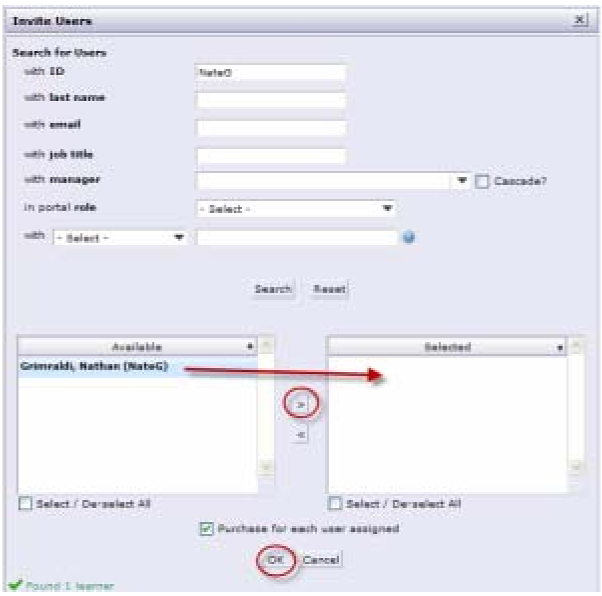
## Assigning Courses

Once you have created some courses you can assign them to Learners. Select a course from the pivot list to view its details. Here you will see the course details. Press the Invite Users button.


Here you can invite existing users from the system to take this course, or invite a new user, who will be sent an email with registration details.

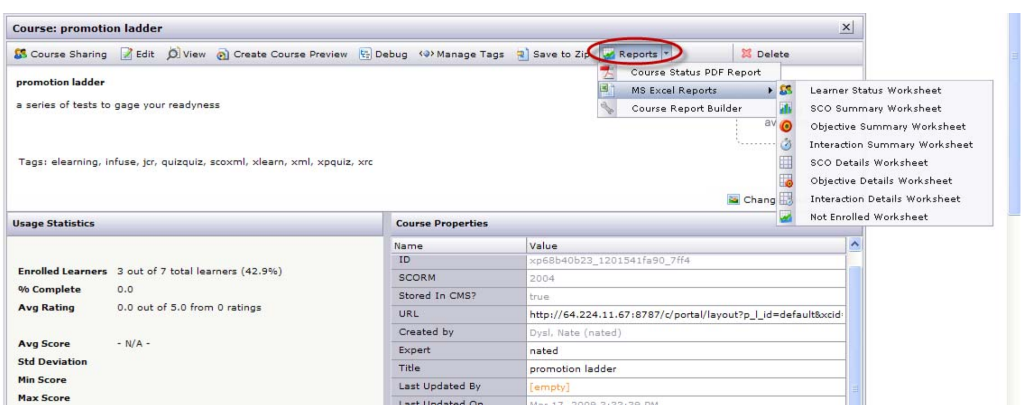
Press the 

button. Search for learner, and select them to invite them to this course. If you are using the commerce engine, you can also purchase the course for the users that you invite. Check the “Purchase for each user assigned” box. Now press the OK button.




## Reports

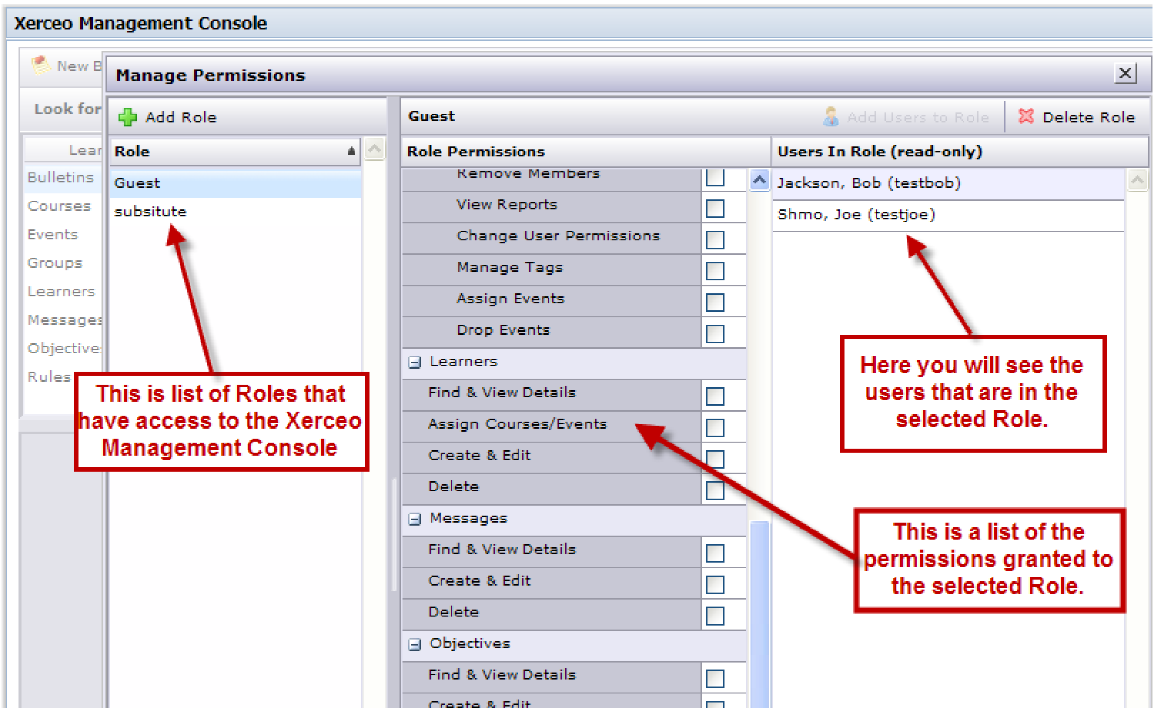
To view a course’s reports, select a course from the course list and press the Reports button. You will be able to view or save a report in PDF format or a variety of MS spreadsheets. You can also build your own customized report.



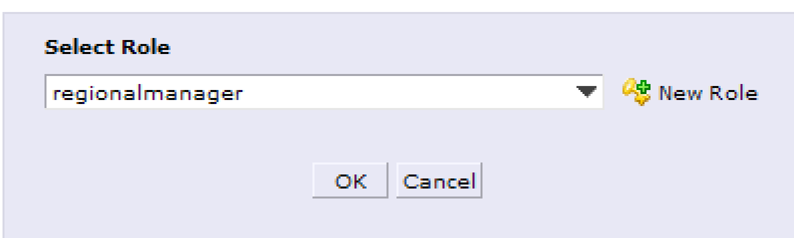

## Managing Permissions for Roles in the Administration Console

It is often necessary to grant some users access to certain features in the Administration Console. You are able to tailor permissions to suit all users' needs specifically.

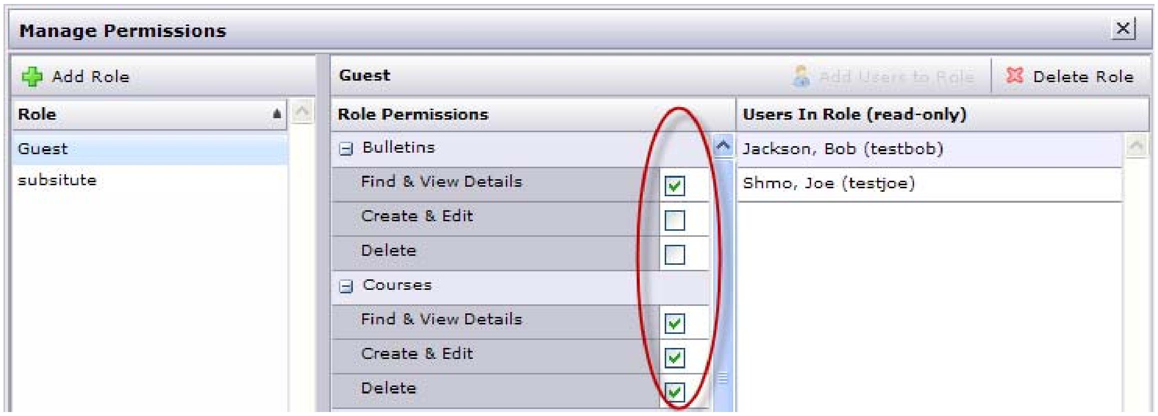
Open the Manage menu and select the Manage Permissions button. This will open a dialog that has a list of roles on the left, a tree of permissions on the right, and a list of Users in the selected Role.



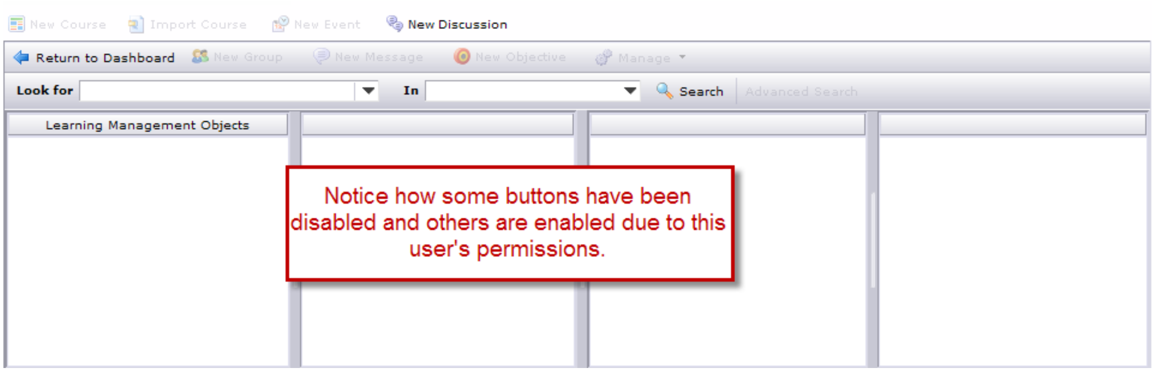

You can add a new role by pressing the Add Role button.
Here you can select a role from the list or create a new role.




Select the New Role button. Next, type in a Role ID and a description. To save, press the OK button. Once you have created a role you can check the actions you would like to grant to the users in this role. Your selections will be saved automatically.




Here is a view of the Administration Console for a user granted limited access




That should get you started working with Xerceo Infuse.