

A graphic featuring a photograph of two people, a man and a woman, looking at a laptop. The photo is overlaid with a semi-transparent orange filter. The entire graphic is framed by a blue border with decorative elements like dashed lines and small shapes.

# Onboarding guide

**This TalentLMS guide is designed to assist Administrators in setting up their accounts and training their employees. Here, you'll find instructions on how to customize your portal, create courses, add users, and assign them to different groups or branches.**

TalentLMS makes it easy for you to train your employees online. Set up your account, create your courses and organize users into different branches if you need to offer custom training to specific departments.

## Customize your account

Customizing TalentLMS allows you to create a **branded** and **personalized** learning experience that aligns with your target audience's preferences. Customizing your training portal is about more than just changing its colors. It's about adjusting the look and feel of your portal so that it matches your brand and identity.

For more information, follow [this article](#), or watch this [webinar](#).

It's recommended that you start by updating your training portal's logo and favicon by going to Account & Settings.



Your logo is the first thing that people will remember about your company. It's located on the top left corner of your portal. It also acts as a home button for your users, regardless of their user type.

The favicon is the little icon that appears on the browser tab.

In the Locale section, you can customize the default language, time zone, as well as the date format of your portal.

The changes you make here will also become the **default settings** for any user added to the portal.

Users can [change their own language](#) and time zone by hovering their mouse over their profile and clicking **my profile**.

Next, visit the Users tab and choose the Sign up method for your training portal:

### **DIRECT**

This will allow anyone with the link to your training portal to set up a user account by using the **Sign up** button.

### **MANUALLY (FROM ADMIN)**

This will remove the Sign up button from the training portal. Only Administrators will be able to create new users on the portal.

Before leaving the page take a moment to spot the [Default Group](#) feature which allows you to assign a core set of courses to all newly registered users automatically.

Your training portal should reflect your organization's look so that your Learners feel right at home when they engage in your courses. You can achieve this by updating your [Homepage](#).

*Pro Tip:* **Create content and choose an organizational structure for your portal before you start bringing users in.**

**Create courses:** The next recommended step is to create a repository of your future [course offerings](#).

### Pro Tip:

When adding content, you can determine how Learners will behave in the course by:



Consider adding [tests](#) and/or [assignments](#) between units in order to:

#### Selecting when a unit is considered successfully completed:

- **Simple checkbox:** a user will be able to click the button to complete and continue
- **Question:** your user has to correctly answer the question to complete the unit
- **After a period of time:** your Learner will need to wait X seconds for the unit to be automatically completed

#### Selecting the order in which the units should be completed

- In any order
- In a sequential order

#### Selecting the overall rule for reaching course completion

- All units are completed
- A percentage of units is completed
- Selected units are completed

1. Assess knowledge and understanding
2. Reinforce the learning process
3. Foster higher training engagement
4. Provide your Learners with feedback
5. Build your Learners' confidence
6. Monitor and analyze progress

You can build out a [learning path](#) that consists of multiple courses that should be completed by Learners in a specific order of your choosing.

Make it a habit to test your courses as an Instructor before you publish them. When completing a course as Instructor, your records will not show up in user reports.

## Branch and groups scenarios

Now it's time to decide on the structure for your portal. The decision to use branches or groups in TalentLMS depends on your specific organizational needs as well as the nature of your training programs and audiences.

### When would you need Branches?

#### When you want to:

- choose a different login or sign up method per department/location
- restrict users from accessing information unrelated to their department/location by training separate groups of learner in their own learning environments
- offer different customization options (logos, colors language, etc.) for different departments/locations
- separate course catalogs per department/location
- allow certain Administrators to access reports of specific department/location only

If you don't need any of the above, use [Groups](#) instead to separate your training audiences.

### When can you use Groups instead?

#### When you want to:

- choose the same login or sign up method for all users
- bring together cohorts of Learners who need to be assigned to a common set of courses
- allow Administrators to perform mass actions on a certain group of users (e.g. enroll a group of users in all courses that are part of the group)
- allow Administrators to access existing reports across all groups
- allow Administrators to filter existing report or list of users by group



To help you decide what is best for your business needs, we have collected some common **case scenarios**.



### Regional Offices

If your company has multiple regional offices, you can customize the training content based on regional needs, assign **local Administrators**, and **track progress at a regional level** with [branches](#).



### Franchise Operations

In a franchise business model, you may have multiple franchisees operating **independently**. By creating **branches** in TalentLMS, you can provide customized training materials to each franchisee, monitor their training progress, and maintain consistent **brand standards** across all locations.



### Departmental Training

In larger organizations with multiple departments, you can create **groups** in TalentLMS. This allows for department-specific training programs, tailored to the unique skill sets and knowledge requirements of each team. Instructors can manage training activities within their departments, while Administrators have an overview of all departmental training efforts.



### Language and location

If your company has employees located in different countries, you can create **branches** to **adjust the language and timezone** of the site locally.



### Compliance Training

Industries such as healthcare, finance, or manufacturing often have specific compliance requirements. By creating **groups** in TalentLMS, you can tailor compliance training materials to meet regional or regulatory requirements by **mass assigning courses** to groups. This ensures employees receive the appropriate training based on their role.



### Employee Development Programs

TalentLMS can also support employee development initiatives. For example, if you have a leadership development program, you can create a **group** for participants. Within that group, you can assign specific courses, and facilitate collaboration among the program's participants ([discussions per group](#)).

## Branch and groups scenarios

Every organization has different needs, and the larger the organization, the more demanding the needs and requirements for a unique set up. Quite often, branches and groups can be **combined** to achieve exactly what you need. Let's see two examples:

This way, learners will be able to see specific courses on the course catalog, but they can be assigned extra training that is not available there, when you feel it's necessary.

**A.** Create a branch for Spanish speakers, and within that **branch**, you can **create multiple groups** to organize Learners further into separate departments.

**B.** Create different **branches** per department, and add one **global group** on the main site with courses that everyone has to be assigned to regardless of their branch.



## Notifications and Automations

In the left menu you will find Notifications and Automations that can help everyone stay on top of training.

By using [Notifications](#), you can send **automated emails** to users so that they receive updates on activities happening on their training portal.

We've put together a few must-haves for you to create a robust notification system that your users can rely on to stay informed about the portal.

Select Recipient	Choose Event	Actual Behavior
Related user	On user create	Share the login details with the newly added users
Related user	On course assignment	Notify users they're assigned to new courses
Related user	X hours after course acquisition	Remind users to complete their courses
Instructor	On course completion	Notify Instructors when a course has been completed by a Learner
Instructor	On course failure	Notify Instructors when a course has been failed by a Learner
Instructor	On course self assign	Keep Instructors in the loop when users self-register to a course
Super Admin	On user create	Notify any member of the management of new users being added to the portal
Super Admin	X hours after user creation and the user has not signed in	Notify any member of the management there are still users that are not using the system, so they may want to reach out, remove, or delete them

## Notifications and Automations

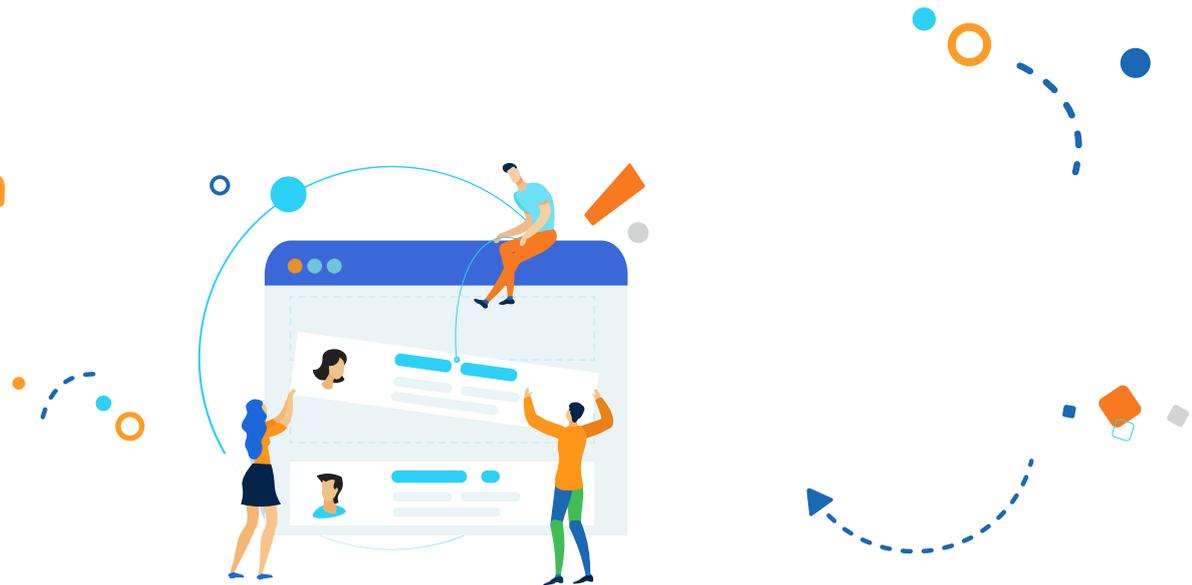
By using [Automations](#), you can **set up actions** that the system will perform once specific criteria have been met. Most automations are designed to assign courses when another one has been assigned or completed. Explore the available options and choose the automations that best suit your training needs.

Automations allow you to:

- streamline your training process
- enhance user engagement
- improve administrative efficiency

Currently, Automations are available on **Pro** and **Enterprise** plans.

If you need to [upgrade](#), you can find more details about our pricing [here](#).



## Add users

Your portal is almost ready to accept users. You can add users one by one, or choose to [import users](#) to the respective groups or branches with an Excel file to save time.

## Reports

Regardless of your training type, reporting is one of the most essential tools for a successful training program.

There are [many different types of reports](#) you could use to review, like User or Course reports.

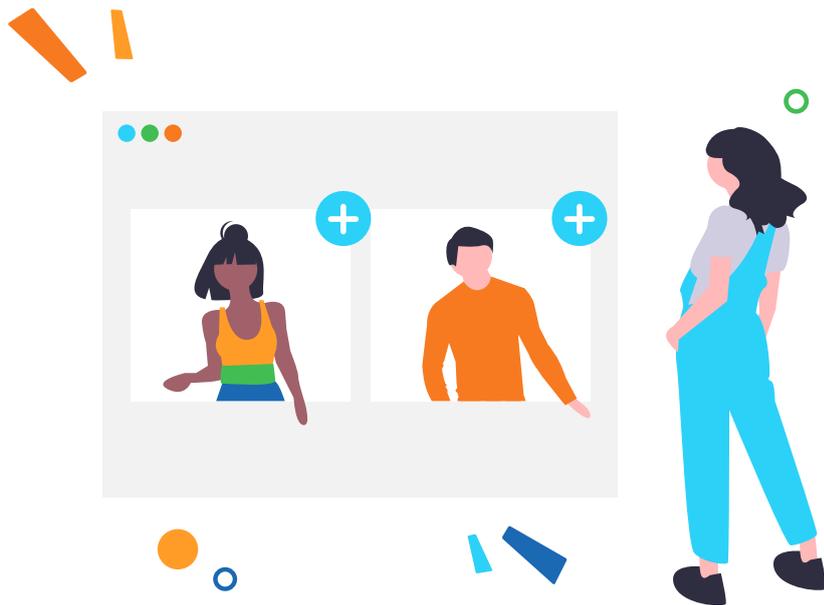
Any report that can be downloaded can also be scheduled to be sent to specific recipients automatically.

You also have the ability to create [Custom reports](#) (available on Premium and Enterprise plans). By combining **Rules** and selecting your **Output**, you will get a report tailored to your needs.

**Mass actions** in Custom reports: This feature allows you to perform an **action** on all the users included in the report. You can save time by sending a message to all users that meet specific requirements, activate/deactivate users, add them to courses, and more.

### *Pro Tip:*

*Create custom reports and schedule them to be sent to any email, even to users that are not enrolled in your portal. This will give you control over who has access to your site and data.*





Thank you

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