Welcome to Compliance Learning Manager

This document is aimed at clients who have signed up to Compliance Learning Manager. It provides step by step guidance on next steps, and how you can help us prepare for a seamless experience.

What has happened so far?
Your signed order form is being processed by our Customer Administration Team. We are scheduling the work and allocating the appropriate resource internally.

What are the next steps?
You will receive a ‘Welcome’ email from our Operations Support Team, who will be responsible for setting you up on Compliance Learning Manager. Please bear in mind that this is usually received within a maximum of 2 weeks of signing your order form.

What will the email say?
This email will welcome you to Compliance Learning Manager and ask you to prepare the specific information in an attached spreadsheet. This information must be sent back to us as soon as possible.

What information must be returned to us?

Details of courses:
• Which courses you wish to rollout to your learners (including Product IDs, dates for rollout)
• Who the account administrators will be and their contact information
• Details of course reminders you wish to send and their frequency (it is not mandatory to set up any reminders, but we do advise it)

Learners to be set up on Compliance Learning Manager (users):
• The structure/hierarchy of your organisation – this defines how users are placed within Compliance Learning Manager
• Email, name and the language to be used – these are mandatory fields (other fields are available)

Please note: Data not provided in the requested format will be returned and asked to be re-submitted.

Once we receive all the information requested in the ‘Welcome’ email, we aim to set you up within 7 days.*

*This is dependent on current workload and whether any add-ons have been requested. The actual set up date will be agreed with you in advance.

Setup completion

What is considered an add-on?

Single sign on
Where your learners do not require a separate log on for Compliance Learning Manager, and their credentials are validated when logging on to corporate systems.

HR integration
This is a two-way process where you can opt to update starters/leavers/movers directly from your HR system, and feed information back about course completions.

Branding of Compliance Learning Manager
You can opt to brand Compliance Learning Manager with your organisation’s logo etc.

Translation of notifications
You can opt to have email notifications (sent on course assignment or to remind incomplete learners to complete) translated into a language of your choice. Our default templates are already available in over 22 languages.
What email notifications will my learners receive?

Learners can be sent a notification on course assignment, and up to three reminders if a course is incomplete.

Can I edit email the notifications my learners receive?

Yes, you can make amendments to the subject or the body of the email. This will all be included in the ‘Welcome’ email, but we advise you to think about this in advance.

Are there any system requirements that I should be aware of?

This should have already been discussed with you by your Account Manager/Sales representative. The Technical Specification document will be issued with the Welcome Email. Please ensure you read this document to ensure that all these requirements are met.

If you have any questions, please speak to your Account Manager or Sales Representative until you are contacted by our Operations Support Team, who will kick start the process of setting up on Compliance Learning Manager.