

iLMS Setup

Last Modified on 06/22/2022 10:18 am CDT

In this section, topics cover items that need to be set up in iLMS prior to any deployment, such as establishing the timezone, password policies, user profile fields, and customizing the Learner experience to better suit your organization's brand.

If you have Phishproof be sure to visit the [Phishproof setup](#) section as well.

Once these items are completed, we recommend visiting the [iLMS User](#), [Emails](#), and [Courses](#) sections to learn more about adding users to the system, sending communications, and enrolling users in courses.

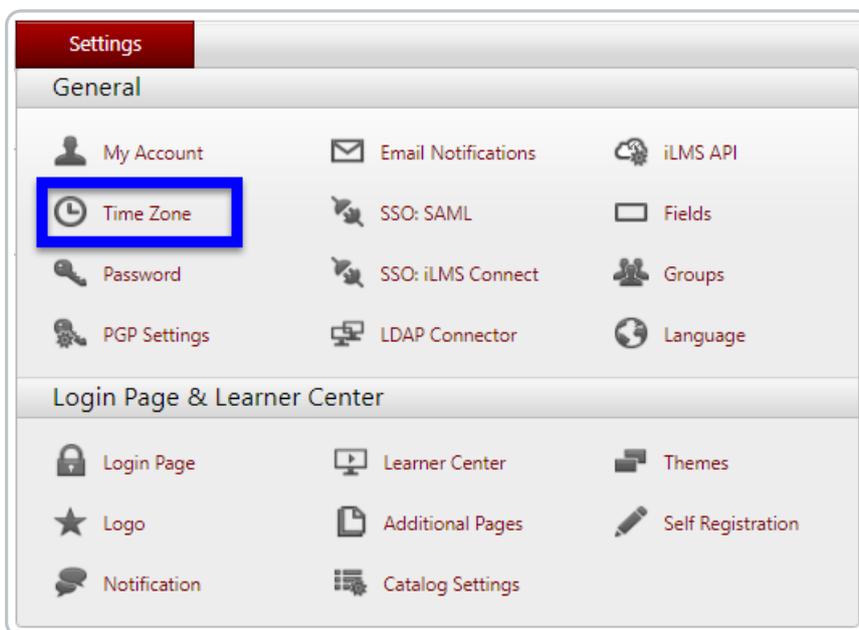
TimeZone

Setting the Time Zone

The Time Zone in iLMS can be set to match your organization's local time to ensure all emails, logs, and other actions of the system reflect the time accurate to your region.

Location:

Settings > Time Zone



Display Time As

Select the time zone that is local to your headquarters. All automated activity will be done according to this time zone and reports and logs will be recorded with this local time.

Time Zone ⓘ

Current Time Zone of the Host Server (GMT-06:00) Central Time (US & Canada)

Display Time as (GMT-06:00) Central Time (US & Canada)

Save

Password Policies

Setting Password Policies

Password settings allow you to set the password policies for your users on iLMS.

Location:

Settings Tab -> Password

Settings

General

- My Account
- Time Zone
- Password**
- PGP Settings
- Email Notifications
- SSO: SAML
- SSO: iLMS Connect
- LDAP Connector
- iLMS API
- Fields
- Groups
- Language

Login Page & Learner Center

- Login Page
- Logo
- Notification
- Learner Center
- Additional Pages
- Catalog Settings
- Themes
- Self Registration

Options:

Password Policy

Password Reset Required After Days

Users will be required to choose a new password when successfully logging in after the specified period of time.

Password Uniqueness Required

New password cannot be the same as the current password on mandatory reset.

- **Password Reset Required After X Days**

Allows you to set a mandatory reset of password after a specified number of days.

- **Password Uniqueness Required**

This option allows you to mandate that password uniqueness, which ensures the user cannot use the same password twice in a row.

Password Complexity

Minimum Password Length (11)

Password must include at least one letter of the alphabet and be longer than 10.

Include At Least One Uppercase Character (A-Z)

Include At Least One Numeric Character (0-9)

Include At Least One Special Character (Example: !@#\$ etc.)

- **Minimum Password Length**

Allow you to set minimum password length. (iLMS Minimum is now 11 Characters)

- **Include At Least One Uppercase Character**

Allows you to set a requirement for at least one uppercase character in the password.

- **Include At Least One Numeric Character (0-9)**

Allows you to set a requirement for least one numeric character in the password.

- **Include At Least One Special Character (Example: !@#\$ etc)**

Allows you to set a requirement for at least one special character in the password.

Account Lockout Policy

Lock User Account After Failed Attempt
Users will be locked out after failing to enter a correct password within the day.

Unlock User Account After Minutes
Users will be automatically unlocked after the specified period of time.

- **Lock User Account After X Failed Attempt**
This setting allows you to set a number of failed attempts after which an account will be locked.
- **Unlock User Account After X Minutes**
This option allows you to set the duration after which a locked-out account will be unlocked automatically.

Fields and Unique Identifier

Setting the Unique Identifier (User Login ID) for your Organization >

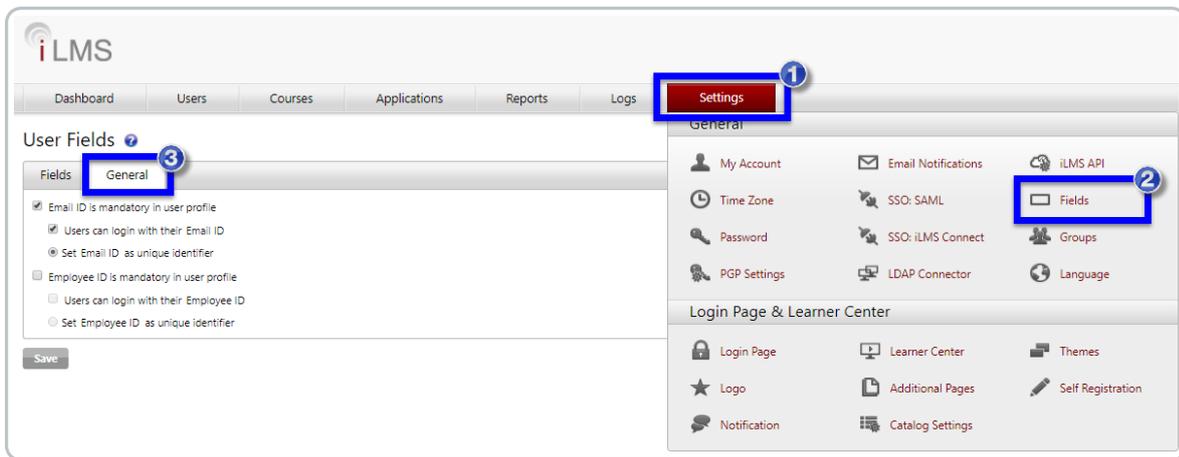
One of the most important options is setting what information will be used to uniquely identify users in the iLMS. This section of iLMS settings can also determine what information a user can use to login to take their training.

iLMS offers two options to use for a unique identifier, Email ID or Employee ID.

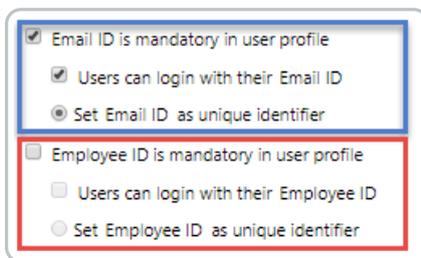
The unique identifier/Login ID for your organization can be set from the location shown below.

Location:

Settings Tab -> Fields -> General Tab



Here your organization can specify whether they'd like to identify user profiles by their Email ID or Employee ID. iLMS also allows users to log in with either an Email ID, Employee ID, or Both, depending on the settings specified in this location.



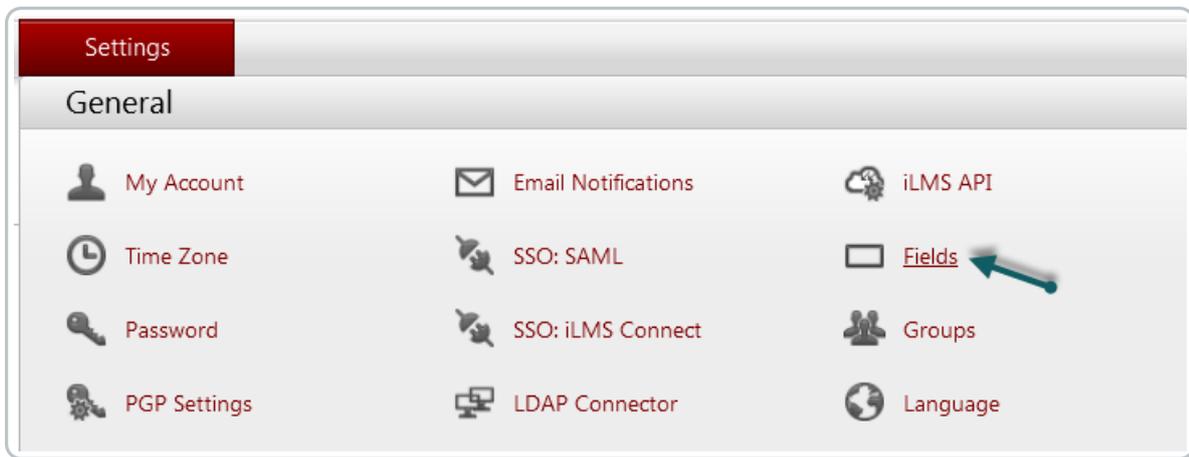
Note: To use either option as a unique identifier, the field must be populated for all users and each of the values populated for the users must be unique.

User Profile - Add, Remove, Customize Fields

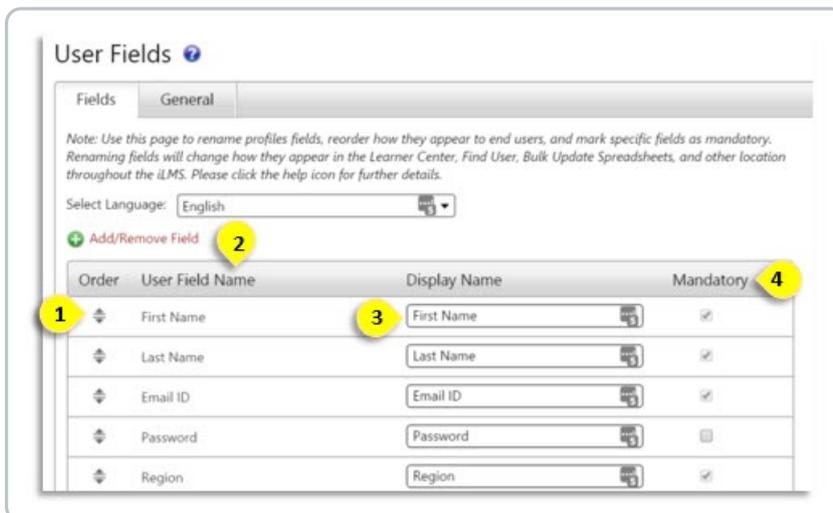
This feature allows you to change how user profile fields appear in the Learner Center, Find Users, Bulk Update spreadsheets, and other locations throughout the iLMS. This can be used to re-purpose a standard field, hide unused fields, or change the order of the fields. It can also be used to customize the language translation for multilingual deployments.

Location

Settings > Fields



Options and Configuration:



1. Order

This option allows you to change the order of the fields in the User Profile and New User Registration screen. Please note that changing the order will not impact the Bulk Update template or a Find User export.

2. User Field Name

This displays the iLMS standard field name.

3. Display Name

This option allows you to customize the user profile field label which is then displayed throughout the ILMS.

4. Mandatory

Allows you to choose which fields are mandatory and therefore required when registering a new User. The following fields are always mandatory and cannot be altered:

- First Name
- Last Name
- Email ID
- Region
- Division
- Department



1. Select Language

The Select Language option allows the administrator to translate the User Profile fields into various languages so they are populated for the user when the Learner Center that is set for that language.

For example, changing the text when the Spanish language is selected will change the text of these fields in the Learner Center only when a user has Spanish listed as the default language in the user's profile.

2. Add/Remove Field

The option allows you to choose the field(s) you want to show on a User's profile page or while registering a new user.

3. The Available Field(s) list shows fields which are available and can be used.

4. The Selected Field(s) list shows fields which are already visible on the user profile and the order in which they appear.

Administrators can also set the Order for the Selected Fields. Highlight the field's name from Selected Field(s) list and use the up and down arrow to change the order.

Note: Administrators cannot remove the following mandatory system fields: **First Name, Last Name, Email, Region, Division, and Department.**

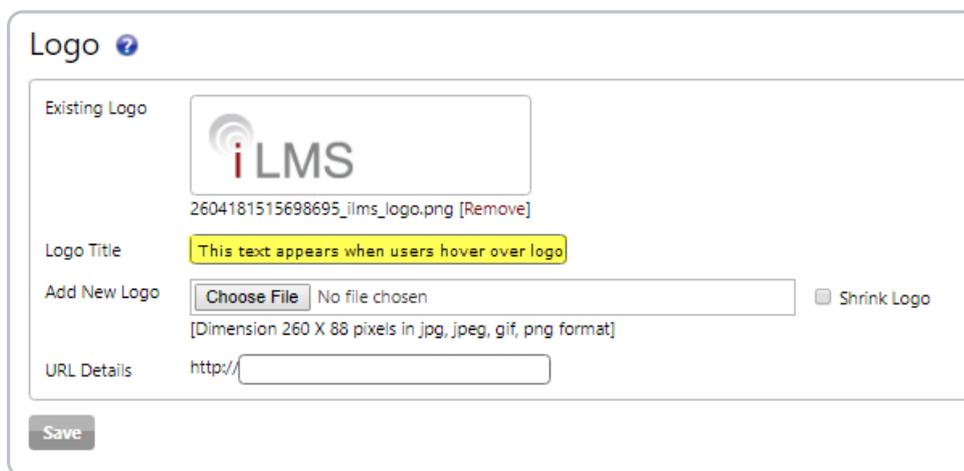
Logo for Learner Center, Login Page, and Certificate

Upload your Company Logo

The iLMS allows you to upload your organization logo for display on the login portal, learner center, and course completion certificates.

Location:

Settings tab -> Login Page & Learner Center section -> Logo



The screenshot shows a configuration window titled "Logo" with a help icon. It contains the following elements:

- Existing Logo:** A preview of the current logo, which is the "iLMS" logo. Below it is the filename "2604181515698695_ilms_logo.png" and a "[Remove]" link.
- Logo Title:** A text input field containing "This text appears when users hover over logo".
- Add New Logo:** A "Choose File" button, a text input field with "No file chosen", and a "Shrink Logo" checkbox.
- URL Details:** A text input field with "http://" and an empty field for the rest of the URL.
- Save:** A button at the bottom left.

Here you can upload your organization's logo. This logo will be displayed on your company's iLMS user login portal, learner center, and it will serve as the default logo for course completion certificates.

To upload a logo simply click on "Choose File", select an image.

Note: Best dimensions are 260x88. Acceptable formats are jpg, jpeg, gif, and png.

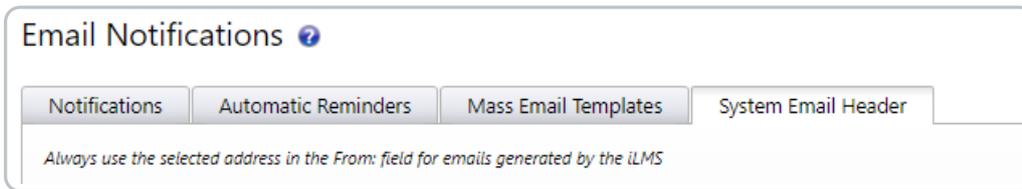
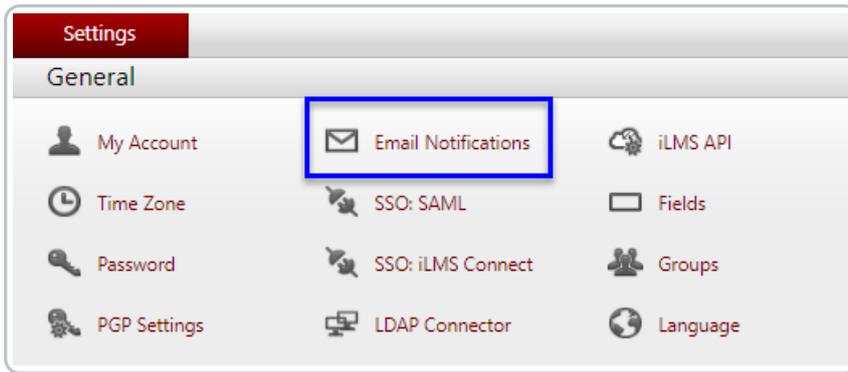
There is also the option to have your logo link to a URL of your choice, if not URL is provided then the logo will simply be static, and not serve as a link.

System Email Header

The system email header will serve as the from address for all communication sent from iLMS. This can be left as our system default, or if your organization would like to specify an email address that will be more familiar to your users, you can add your own email address.

Location:

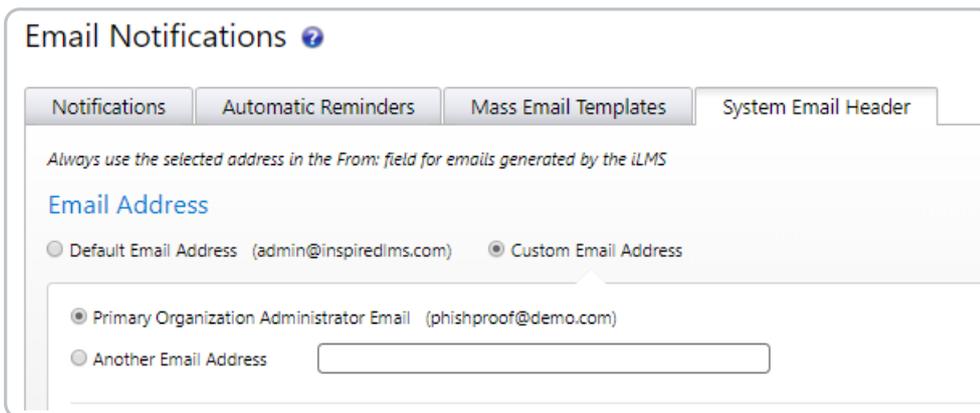
Settings Tab -> Email Notifications -> System Email Header sub-tab



Default Email Address

By default the iLMS will use our default "admin@inspiredlms.com" as the system email header.

If the "default" option is selected, your organization will want to make sure that "admin@inspiredlms.com" is white-listed in all locations necessary for emails to make it to recipients' inboxes. In most cases this is a task that your organization IT team can assist with. You may also need to inform users to trust email communications coming from our email address.



Custom Email Address

Your organization does have the ability to add your own email address as the system email header.

This can be the email address used as primary organization admin, or a separate email address.

The benefit of this option is the ability to use an email address that is already trusted by your internal users, and it

also allows your users a channel of communication back to the team within your organization that can assist them with questions about their training or any issues they encounter.

If this option is selected, we usually recommend an email distro is used as opposed to an individual's address.

A custom email address will also require records be added to the domain used to grant iLMS permission to send communication on behalf of your organization. For example, if your custom email address is "training@mycompany.com", SPF records will need to be added for "@mycompany.com". (this will be a domain owned by your organization, so the IT team can usually assist with this) This ensures higher success of delivery as many security measures will reject messages sent by a system that spoofs a domain without permission.

If you'd like to use a custom email address from your organization, please mention this to your **Technical Account Manager** with Inspired eLearning so they can provide you with the details your IT team will need to add to the SPF records. iLMS has a couple of SMTP service options, so depending on which one is in use for your organization this information will differ.

Email Notifications

Notifications Automatic Reminders Mass Email Templates System Email Header

Always use the selected address in the From: field for emails generated by the iLMS

Email Address

Default Email Address (admin@inspiredims.com) Custom Email Address

Primary Organization Administrator Email (phishproof@demo.com)

Another Email Address

SPF TXT Record v=spf1 ip4:166.78.71.191/32

MAIL WILL NOT SEND UNLESS THIS RECORD IS ADDED TO YOUR DNS. The Sender Policy Framework (SPF) attempts to control forged email by giving domain owners a way to specify which email sources are legitimate for their domain and which ones aren't. For detailed information about SPF, please click here.

Sender's Name

Display Sender's Name on Email as

Save

Display Sender's Name on Email as

This option allows your organization to specify the name that will appear to recipients in the "From" location on an email.

Login Page Customization

Learner Login Page Options

This is the page that will be linked in iLMS email notifications by default and will be the location where users log in to take training.

(Unless using Single-SignOn)

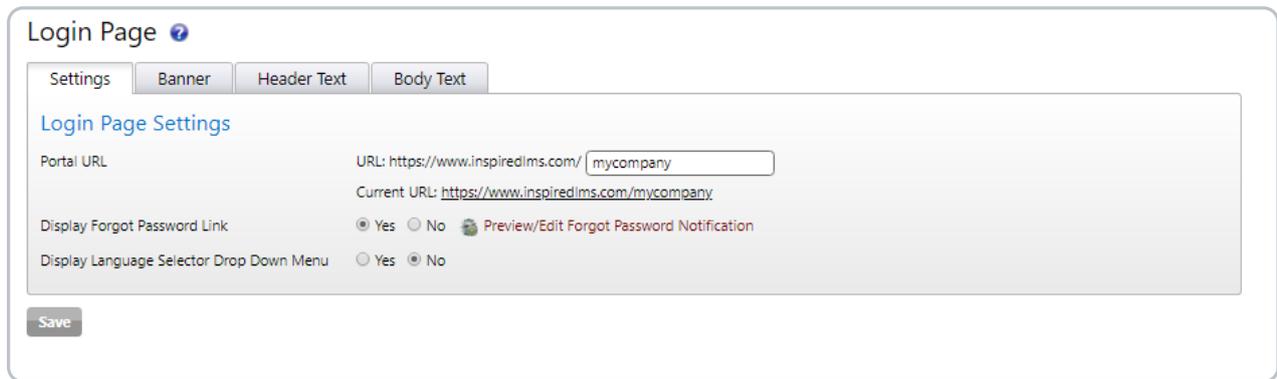
Location:

Settings tab -> Login Page & Learner Center section -> Login Page

Sub-tabs:

- Settings
- Banner
- Header Text
- Body Text

Settings:



The screenshot shows the 'Login Page' settings interface. At the top, there are four tabs: 'Settings', 'Banner', 'Header Text', and 'Body Text'. The 'Settings' tab is selected. Below the tabs, the title 'Login Page Settings' is displayed. The 'Portal URL' section shows a text input field with the value 'https://www.inspiredlms.com/mycompany'. Below this, the 'Current URL' is shown as 'https://www.inspiredlms.com/mycompany'. The 'Display Forgot Password Link' section has two radio buttons: 'Yes' (selected) and 'No'. To the right of these radio buttons is a link labeled 'Preview/Edit Forgot Password Notification'. The 'Display Language Selector Drop Down Menu' section has two radio buttons: 'Yes' and 'No' (selected). At the bottom left of the settings area, there is a 'Save' button.

Login URL:

The first tab displayed for the Login page is the "Settings tab". From this section, you change the URL for your organization's iLMS login portal.

Note: If you are mid-deployment this is not advised as any previous emails sent will contain the old URL.

Forgot Password Link:

The forgot password link can also be enabled/disabled on the Login Portal. By default, the link is enabled so that users have a path forward if they need to recover access to their account.

Note: If your organization decides to handle authentication solely by SSO, then it may be beneficial to disable the forgot password link to prevent users from logging in via the traditional login portal.

Language Selection:

The login page can also provide an option for users to select their own language if desired. The page will display in English by default.

When generating email notifications, users will receive a link to the portal in the languages specified by their user profile.

Banner:

The Banner sub-tab of our Login Page settings allows you to select the Banner image that displays when users access the login page. Your current banner displays at the top of the page.

Login Page [?](#)

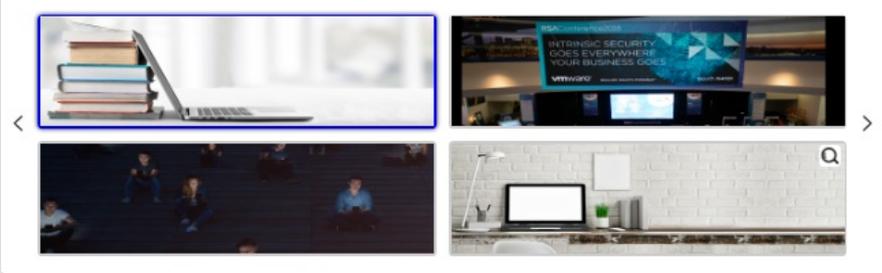
Settings Banner Header Text Body Text

Current Banner



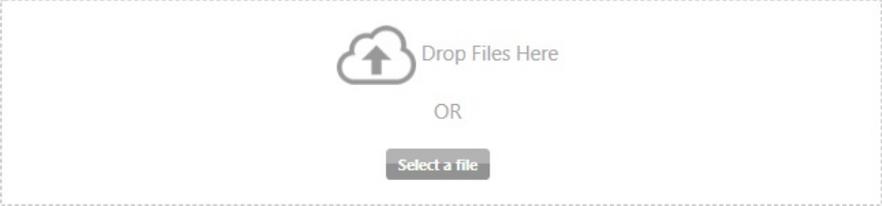
Change Banner

Select an image from the gallery



or

Upload a new image



OR

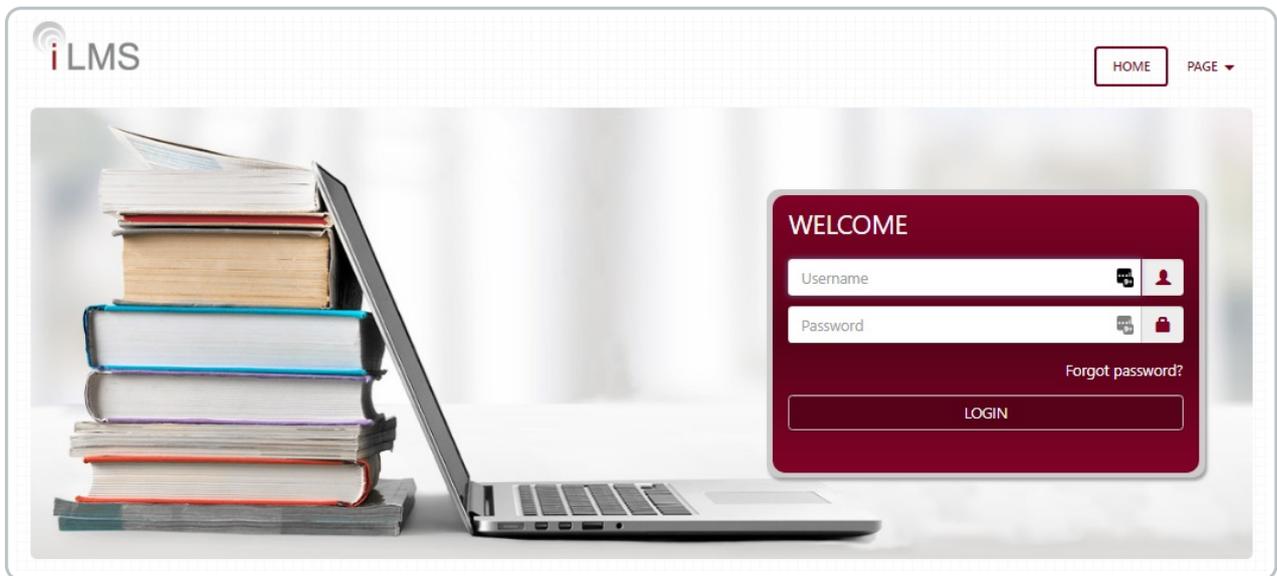
Select a file

[Dimension 1140 X 424 pixels in jpeg, png, gif format]

Save

To change the banner click the Change Banner button.

Here you can choose from one of our default options, or you may upload your own by simply dragging the image file into the drop zone.



Note: For the best image quality, please upload a jpeg, png, or gif that is 1140 pixels wide by 424 pixels high.

To view the full-size image of any of the prefab banners, hover over the image, click the magnifying glass in the upper-right and this will allow you to zoom and enlarge any image.

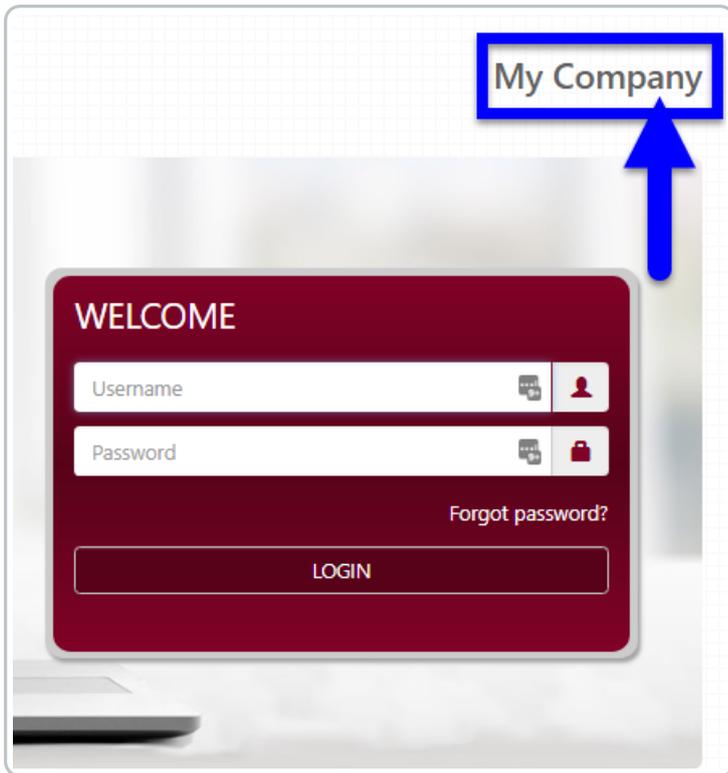
Click anywhere on the screen to return to the main window. When you've made your final selections, click Save.

Header Text:

Header Text allows you to display text above the banner and login form. You can display the organization name or custom text if desired. An example of the location where the header text displays on the login page is provided below.

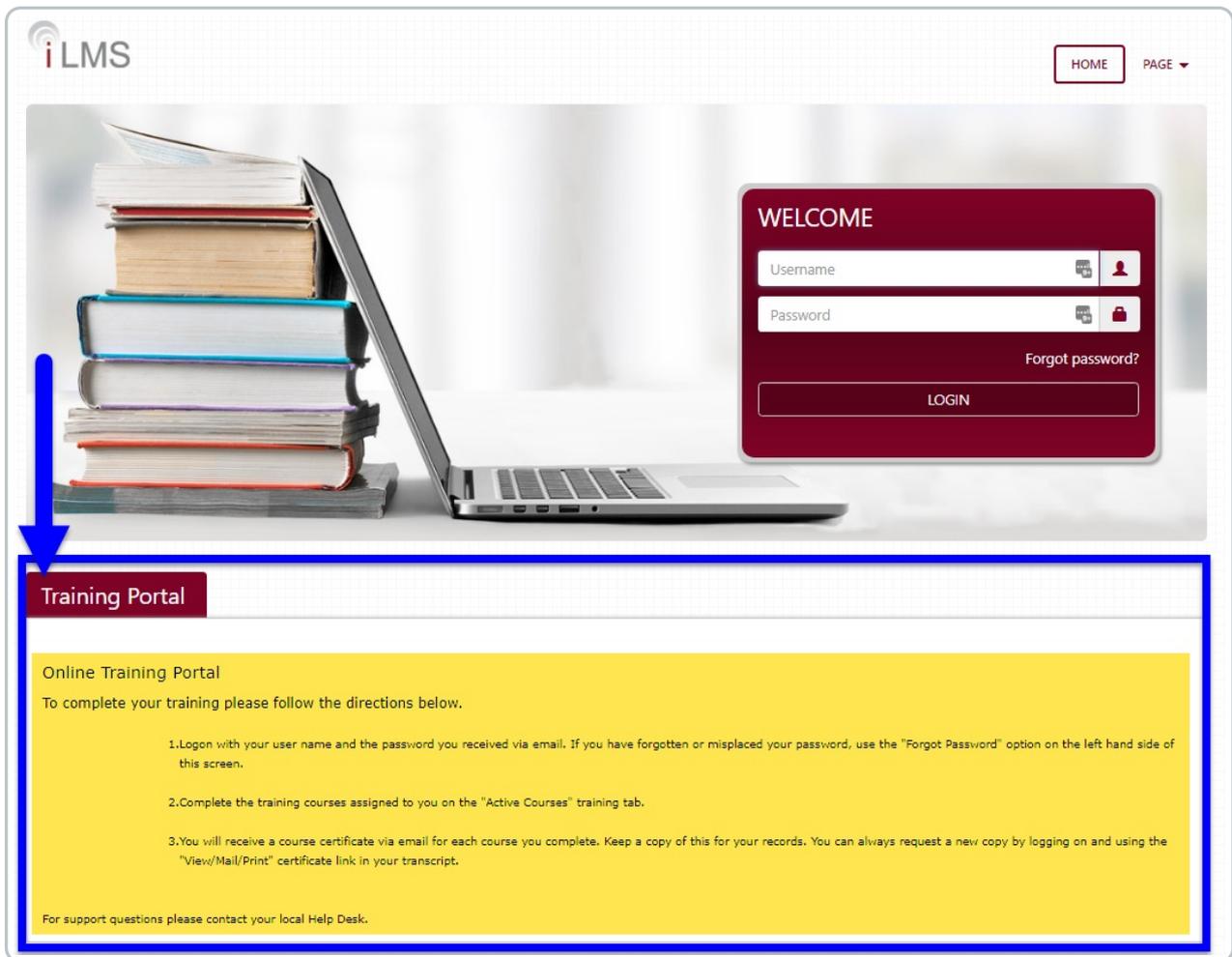


An example of the location where the header text displays on the login page is provided below.



Body Text:

If you would like to display additional texts on the Login page, please click on the Body Text sub-tab, insert the message in the editor box, and enable it by checking the box above the editor.



Learner Center Customization

Learner Center Options

Location:

Settings tab -> Login Page & Learner Center section -> Learner Center

Sub-tabs

- Banner
- Logout
- Support
- Business Rules

Banner:

The Banner sub-tab of our Login Page settings allows you to select the Banner image that displays when users access the login page. Your current banner displays at the top of the page.

Learner Center 

Banner Logout Support Business Rules

Current Banner



 Change Banner

Select an image from the gallery



or

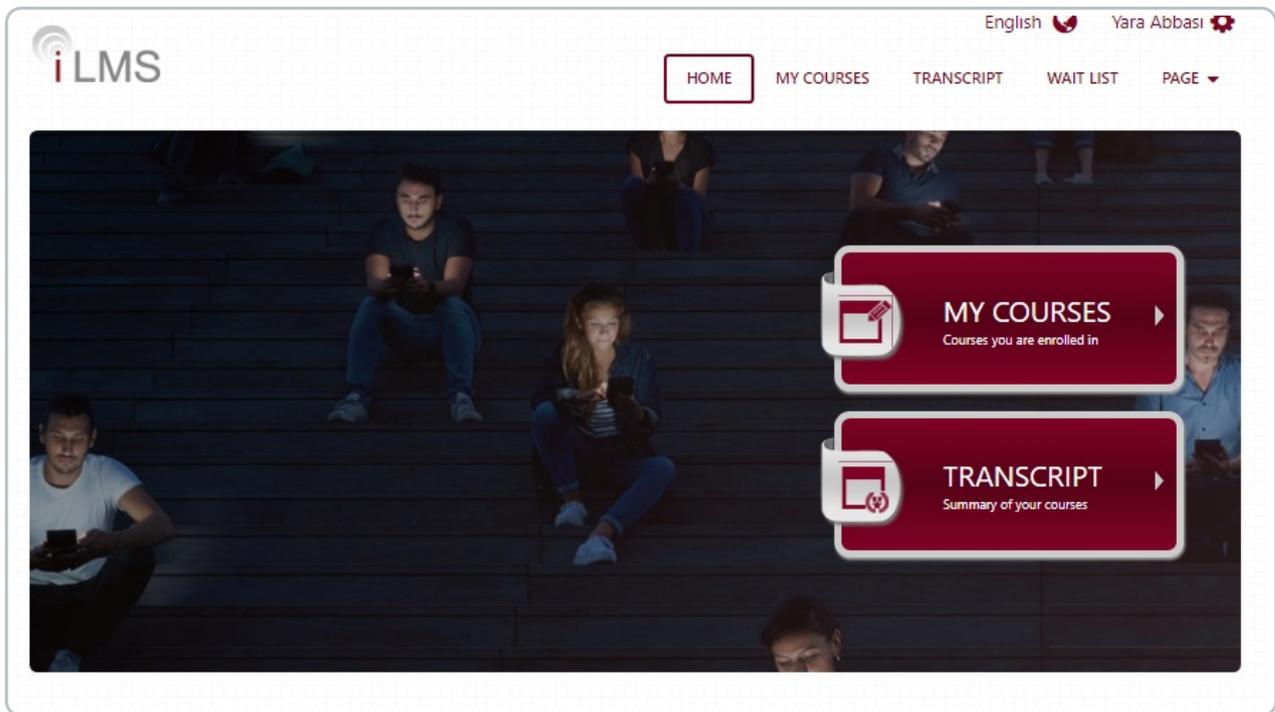
Upload a new image

 Drop Files Here
OR

[Dimension 1140 X 424 pixels in jpeg, png, gif format]

To change the banner click the Change Banner button. Here you can choose from one of our default options, or you may upload your own by simply dragging the image file into the drop zone.

Note: For the best image quality, please upload a jpeg, png, or gif that is 1140 pixels wide by 424 pixels high.



To view the full-size image of any of the prefab banners, hover over the image, click the magnifying glass in the upper-right and this will allow you to zoom and enlarge any image. Click anywhere on the screen to return to the main window.

When you've made your final selections, click **Save**.

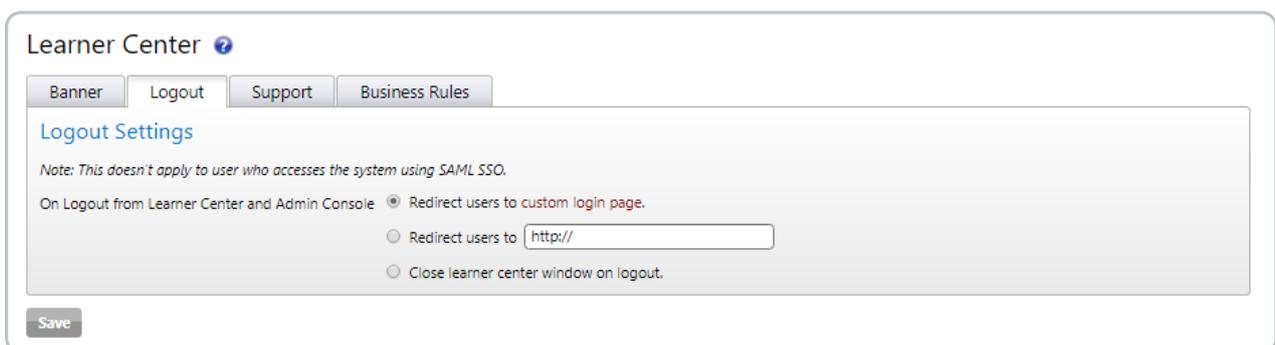
To preview the Banner on the Learner center, you can log in as a user.

To do this go to the Dashboard tab.

1. Click active users to bring up the full list of active users.
2. Click the name of a user to bring up their profile.
3. In the upper-left just below the user's name, click "Login as User "

Logout:

This section allows your organization to specify a page Learners will land on upon logging out of their iLMS account.



Support:

There will, of course, be times, when Learners need to reach out for assistance during training. To direct them to the correct internal teams or resources, the Learner Center provides a Support link at the bottom of the page.

Your organization can specify whether this link leads to one of three options:

The screenshot shows the 'Learner Center' interface with tabs for Banner, Logout, Support, and Business Rules. The 'Support' tab is active, displaying 'Support Settings'. The settings are for the 'Contact Support' link. There are three radio button options: 1. 'Send support questions to the primary organization admin email (My Company)'. 2. 'Send support questions to the email address(es) below:' with a text input field and a note 'Separate email address with a comma (,)'. 3. 'Send support questions to the web page below:' with a text input field containing 'http://' and a note '(Maximum 250 characters)'. A 'Save' button is at the bottom left.

1. The Primary Org Administrator's email address
2. A different email address(es) specified in the blank provided.
3. A URL provided by your organization.

Business Rules:

This section allows you to specify how courses are handled by your organization's account in the Learner Center.

The screenshot shows the 'Learner Center' interface with tabs for Banner, Logout, Support, and Business Rules. The 'Business Rules' tab is active, displaying 'Business Rules'. There are three main sections: 1. 'Auto-Reset on Failure' with a checkbox and the text 'Automatically reset courses to "Not Started" on course failure. Each reset is logged in the course footprint.' 2. 'How to Handle Failed Courses' with two radio button options: 'Count failed courses as incomplete in the Learner Center.' and 'Count failed courses as complete in the Learner Center.' 3. 'Default Toggle Setting to Filter Completed Courses' with a toggle switch set to 'Show Completed Courses' (checked) and a checkbox for 'Override admin default toggle settings to filter completed courses at the learners' level. (If checked, learners will be able to control whether completed courses are displayed in their My Courses list.) A 'Save' button is at the bottom left.

Auto-Reset on Failure

Courses generally have their own allotted number of attempts for passing score, but if you'd like to give users unlimited chances to pass a course without having to reconfigure settings per course, then you can have the learner center automatically reset the course to not started upon receiving a failed status.

Auto-resets are logged in the user's launch history on the transcript.

How to Handle Failed Courses

Another option for failed courses is to have them marked as "incomplete" as opposed to complete upon receiving a failed status.

Default Toggle Setting to Filter Completed Courses

As users complete several courses over time, completed courses can clutter up the course list and make it difficult to locate training that still needs to be taken. This option filters out completed training by default so that users can focus only on the courses they've not yet completed.

Override admin default Checkbox

This option allows users to set their own preference on the completed course filter, overriding the admin default if the learner has an alternate preference. If unchecked, the learner will see courses displayed the way the admin settings for the filter dictate any time they log in.

Themes

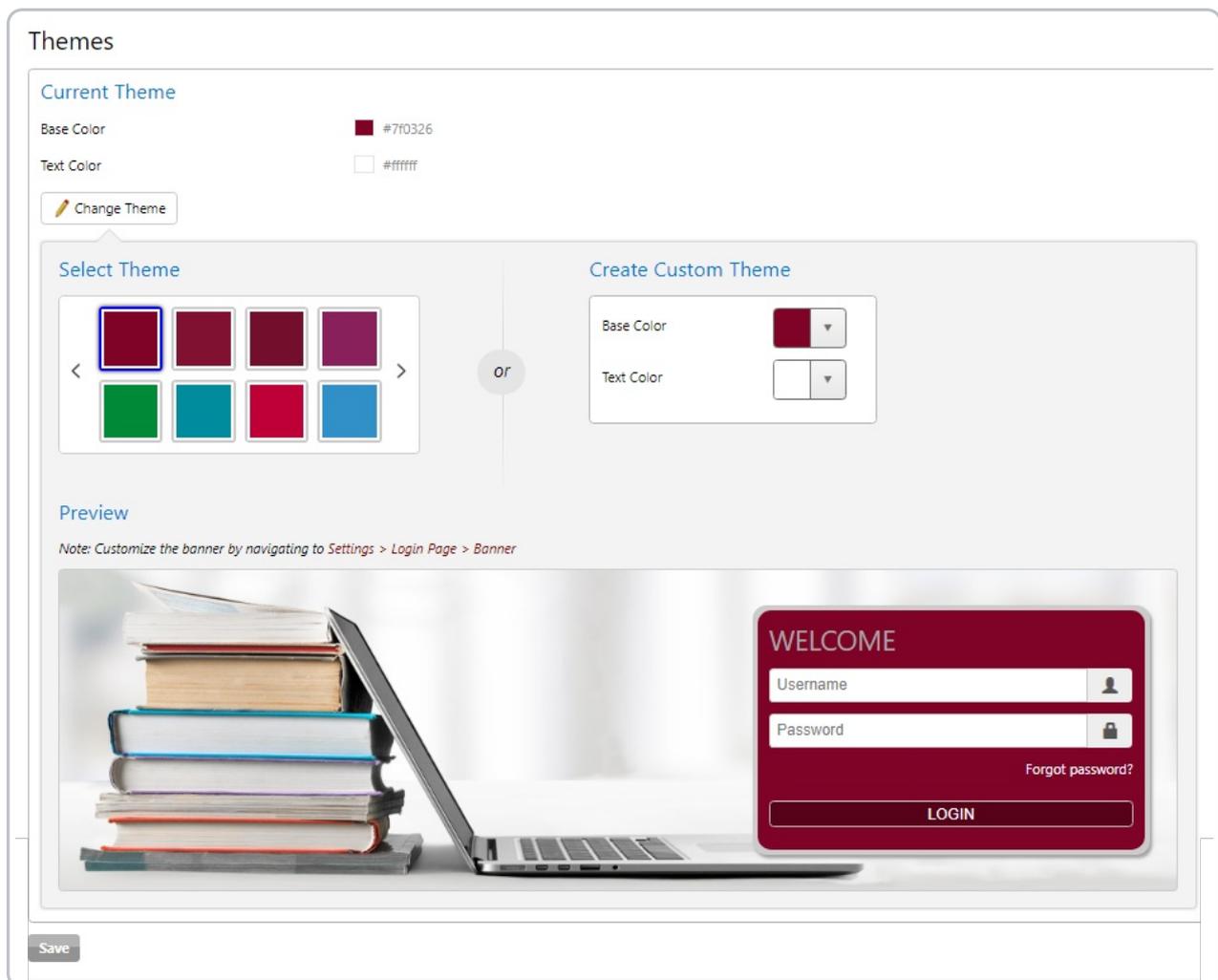
Adding a Theme to Login Page and Learner Center

This tool allows your organization to select a color palette that will be used for both the login portal and learner center.

Location:

Settings tab -> Login Page & Learner Center section -> Themes

Choose from one of our default color palettes, or create a custom theme that compliments your banner.



The page will open, displaying the current Learner Center base and text color.

Prefab Color Palette

1. Click on the [Change Theme](#) button
2. To choose one of the default color palettes, simply click on a color box.
(The Preview section below will display your selection against your chosen banner.)
3. Click Save once you've made your final selection.

Custom Theme

1. Click on the [Change Theme](#) button
2. To create a custom theme, simply click on the down arrow next to the "Base Color" square.
3. Select a color from the main color ribbon below and adjust the tone by selecting a color shade within the palette box.
4. Repeat these steps for the Text Color.

Note: choose a darker text shade against a lighter base color selection and vice versa.

To preview the Banner on the Learner center, you can log in as a user.

To do this go to the Dashboard tab.

1. Click active users to bring up the full list of active users.
2. Click the name of a user to bring up their profile.
3. In the upper-left just below the user's name, click Login as User

Additional Pages

Add Additional Pages to the iLMS user login portal or Learner Center

If your organization would like to provide user's with additional information, you can add additional pages to both the iLMS login Portal or Learner center.

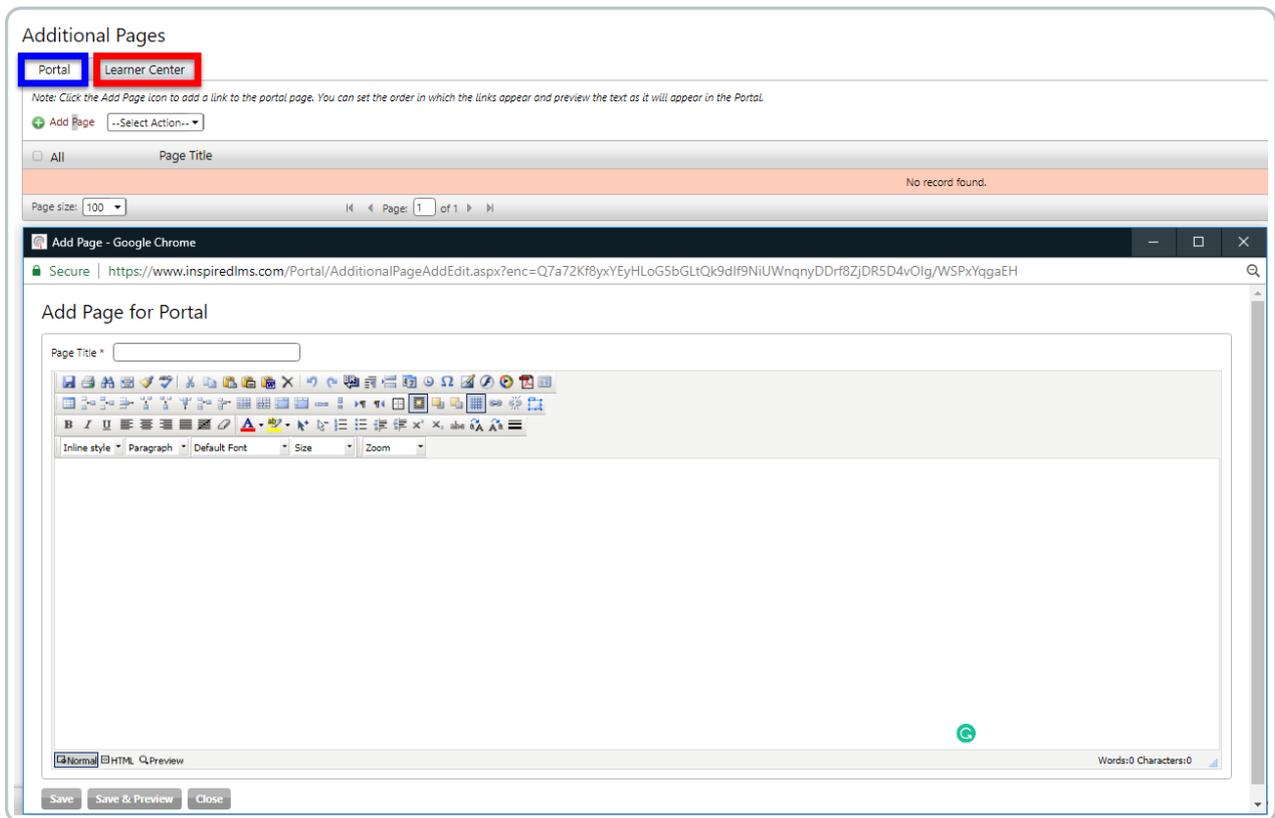
Location:

Settings tab -> Login Page & Learner Center section -> Additional Pages

If you'd like to add any additional information to the Login Page or Learner center for display to your users, you can add pages or text here.

- Select **Portal** to create pages for the Login Portal
- Select **Learner** center to create pages to be added to the Learner center which will be visible after login.

Use the editor to create your pages, and once completed hit **Save & Preview** at the bottom of the editor to see your work.



By default, the pages displayed in the Learner center are Home, My Courses, and Transcript. These cannot be removed, but this tool allows you to add pages in addition to these defaults.

Login Page Notification

Create a Login Page Notification

This tool allows you to create and display a notification that will be visible to users on the login page. This is great for messages that need to be displayed and relayed to users for a short duration prior to training. These settings are located under the settings tab. Click the name of any section above, or click a tool in the image below to learn more about customizing the learner experience.

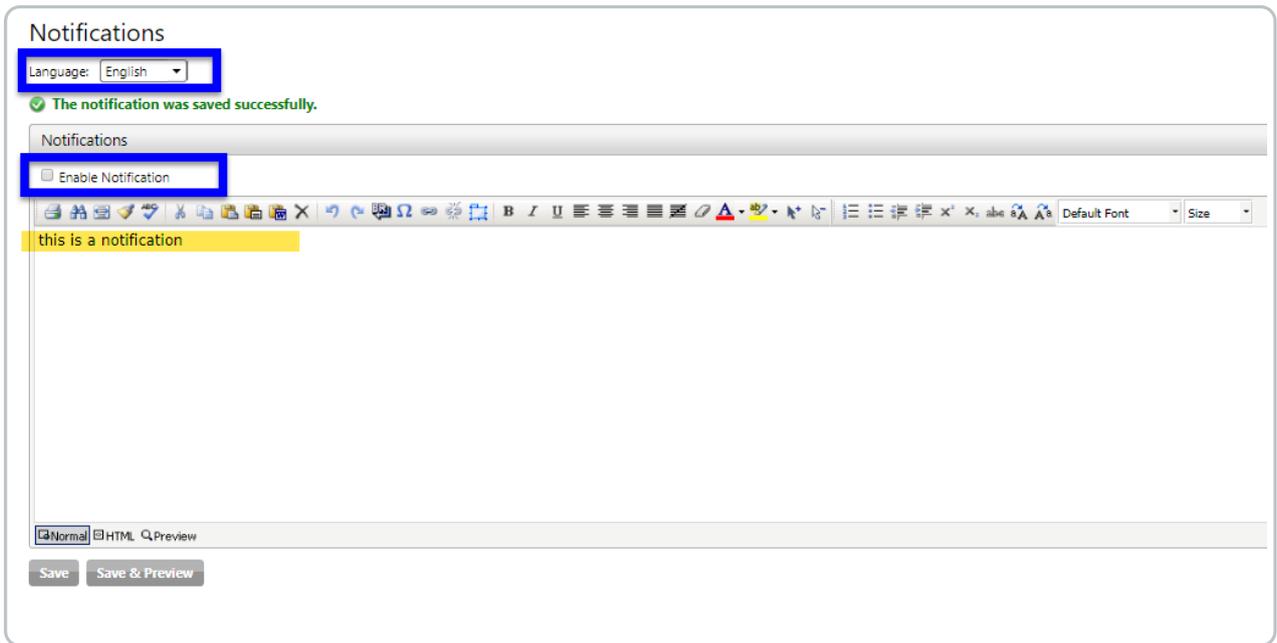
Location:

Settings tab -> Login Page & Learner Center section -> Notification

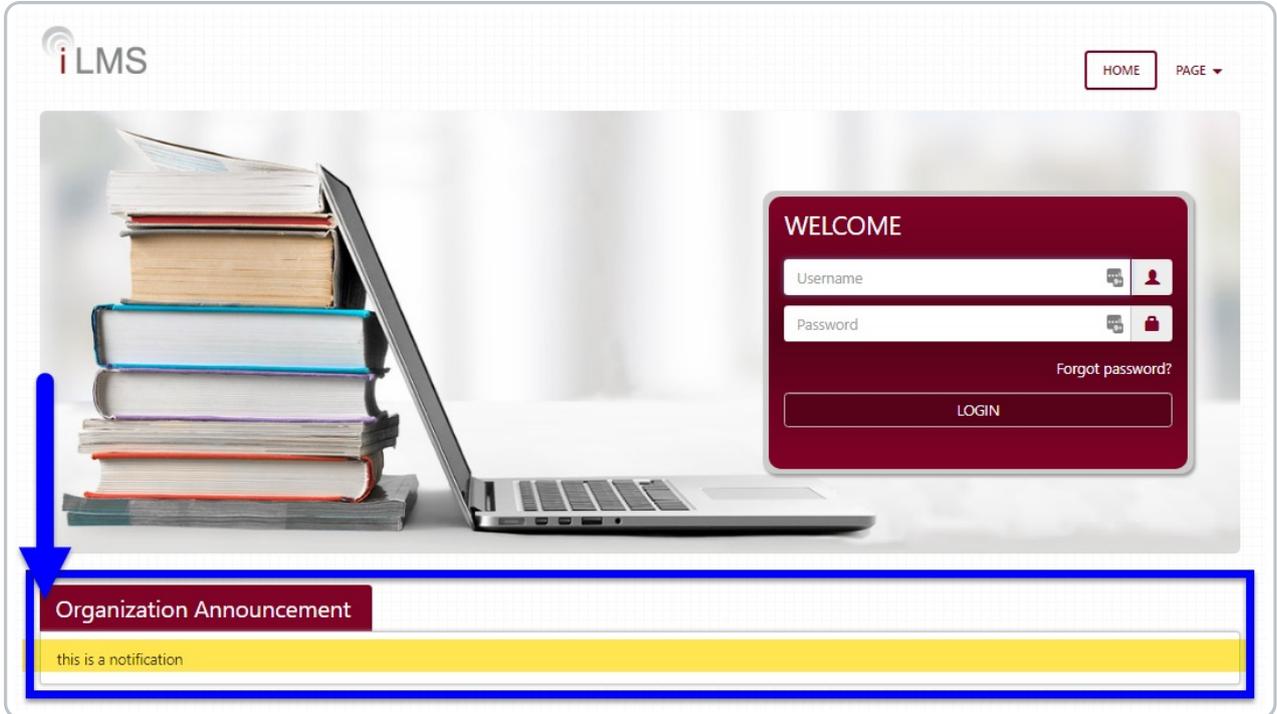
If your organization has a message they'd like learners to see upon logging in, then you can create a notification.

The login page notification section can quickly be enabled and disabled from this page.

Use the editor to create the text and formatting to be used in your notification, and click **Save & Preview** to review and save your work.



An Example of the notification is displayed in the image below:



Pilot Testing Recommendations

To ensure the smoothest training deployment we recommend conducting a pilot test with a small group of users.

As a best practice, we recommend a pilot test with a small group of users (more for larger groups and locations) to test email delivery, and test course(s) for bookmarking and completion in the organization environment.

This is not a content review, but a function test.

The group should include a sample of learners representing those who will take the course during full deployment, including different technical environments, computer builds, languages, various locations, etc.

This will help identify any issues that may arise in your technical environment, so they can be resolved before your full deployment.

Below are a few points you might find useful for your pilot test group email (edit appropriately):

Thank you for participating in the training pilot test group for our course, **[COURSE # AND TITLE]**. Pilot testing is a very important step before we deploy to all our colleagues.

You'll receive a registration email so that you can access the Learner Portal and set your password. This will be followed by a course Enrollment email later the same day. Please test for the following and send us your feedback confirming each step:

- **[OMIT IF USING SSO]** Received Registration email (registration into the Learning Management System).
- **[OMIT IF USING SSO]** Able to set your password and login to the Learner Portal.
- Received the Enrollment email for the course.
- Able to access learner portal and see courses under My Courses.
- Course launched and ran as a pop-up window.
- Bookmarking – close the course early, perhaps the 3rd page. Relaunch and confirm that it begins at the page where you closed.
- Complete the course and check that your status shows completed in your Transcript.
- Received the course completion certificate by email.

Please let me know if you have any questions.

[Contact Person]

Training Announcement

Training Announcement for Full Deployment

Before the training roll-out, we recommend that you send out a mass-email announcement about the upcoming training. This will allow you to inform your learners that they should be expecting communication from the iLMS in the near future and lessen the chances that they will delete or disregard emails assuming they are spam/junk.

Timing the Announcement

Although you may discuss training and plans with your staff earlier, we recommend that the official announcement go out within 1 week prior to the training deployment.

The goal is to ensure your learners have enough time to view the announcement and mentally prepare for the upcoming training and expect iLMS notifications, but not so much time that they forget.

Suggested Email Template

The template below might be useful as a starting point for your announcement message.

Dear Staff,

[ORGANIZATION] is implementing [TYPE OF TRAINING] training for all employees hosted by Inspired eLearning at their website (www.inspiredlms.com). The training should be completed by [Date].

Please watch for a registration and enrollment emails from [iLMS email address] which will contain instructions for accessing the Learning Management System (LMS).

Key Points About This Training:

- You may logout at any time during the content portion of the course and login again at a later time at the same page where you left off.
- Your browser session will automatically timeout after a period of two hours of inactivity.
- Once you have reached the exam portion of the course, log out only after completing the exam.
- Logging out during the exam or allowing the course to sit for 30 minutes of inactivity will result in one failed attempt.

This training program will allow us to focus on [TYPE OF ISSUES] issues company wide and better meet our mission and goals. If you have any questions, please contact [Contact Email Address].

Thank You,

[Contact Person]
