CYPHER for business
Guide for administrators

Enroll in course

Add to group

Award certificate

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Introduction

CYPHER Learning is leading the necessary disruption of learning platforms to unleash human potential with modern learning.

CYPHER exists to ignite lifelong passions through personalized, engaging, and limitless learning experiences for all. We give learning and development (L&D) professionals, HR, and trainers more time to train, build human connection into everything we do, and deliver tailored learning experiences that are meaningful and measurable.

Just the way modern learners expect.

The CYPHER platform is easy-to-use, beautifully designed, and infused with AI-powered technology. Every aspect beams thoughtful innovation and engineering that puts people first. Millions of users experience their "just in time, just for me, just the way I want it" approach in 50+ languages with the CYPHER award-winning platform.

We want you to get the best results when using our site, especially when you are just starting out. That is why we created three getting started guides for the main types of users on CYPHER: administrators, instructors, and learners.

Getting started guide for Administrators (this guide) explains topics such as: navigating in CYPHER, using the Help Center, creating accounts, customizing the platform, setting up e-commerce and managing users.

Getting started guide for Instructors explains topics such as: navigating in CYPHER, using the Help Center, creating, and configuring courses, enrolling learners, using automation and gamification.

Getting started guide for Learners explains topics such as: navigating in CYPHER, using the Help Center, enrolling in courses, submitting assessments, communicating with instructors, and more.

This guide covers the most common steps administrators go through when they start using CYPHER. Please consult the table of contents if you want to find a specific topic. If you have any additional questions or want to explore more of your platform's features, please browse the Help Center or visit our support forum.

Navigating the platform

The user dashboard is the first page you see when you log in to your account. Here you can see the carousel with the most important site data, your courses, goals, and widgets. There is also information related to your account such as your calendar, to-do list, notifications, and more.

Icons and navigation

You will see various icons in the platform that are used for adding, editing, deleting, and other actions. Here is an overview of the most important icons:

+	Add content such as courses, rules, or portal pages.
—	Remove items from your platform.
✏️	Edit a page or an item.
⚙️	Configure different areas of the platform.
🗑️	Delete items.
✉️	Access your messages through the message's icon in the top right bar.
🔔	Notifications allow you to keep up with different changes in the system.
🗑️	The trash icon opens a popup with all your deleted content.
🛒	Your shopping cart contains your ordered items.
❓	This icon provides access to the CYPHER Help Center.
🔍	Use the search icon to find specific content on your site.

Left bar

The left bar displays tabs that allow you to quickly navigate to the main areas of the site, such as Home, Courses, Users, Resources, Reports, Compliance, Organizations, and Admin.
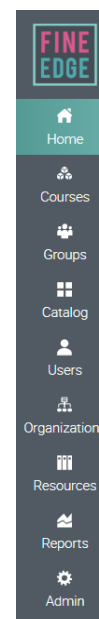
The left bar gives you access to these tabs no matter where you are in the site. If you hover over a tab, a pop-up window will appear with the most important options for that area.
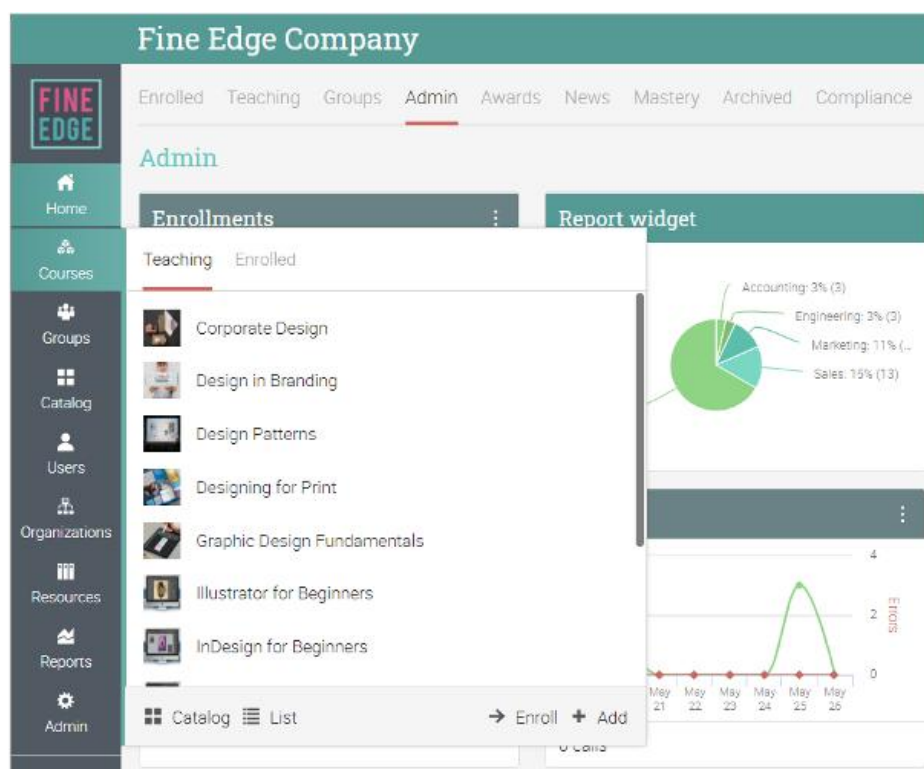
For example, when you visit a course, the main left bar is minimized, allowing you to navigate within any area of the site by simply hovering over the main menu in the top left side of the page. The course left bar shows tabs lead you to course areas such as: start, admin, scores, assessments, and more.
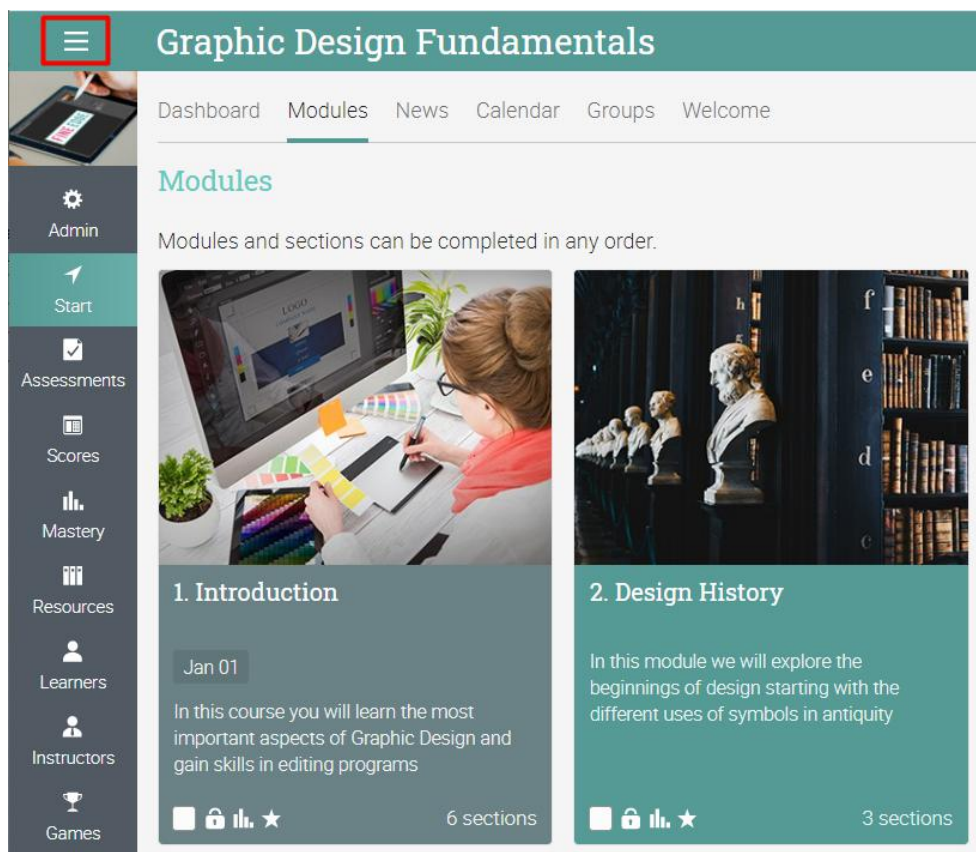
Top right bar

The top right bar displays icons which you can click to access your messages, notifications, calendar, trash can, help center, search, and profile.

Right bar

In the right bar, you can find your to-do list, announcements, upcoming events, and a list of minimized windows. To see more details, just click on an item.

News feed

The news feed aggregates news items from users, courses, groups, and company. Product News announcements usually contain updates from the CYPHER team. By default, a news feed only shows the latest news, and you can scroll down the page for more items.

Help Center

We provide extensive support at every step of our collaboration. To access the Help Center, click the icon in the top right bar.

A pop-up box will open with different options. Use the searchable online help to browse different help topics. If you are on a certain page and need guidance, a help for the current page option will also appear. Here you can also find access to our Support forum and Product news, where we frequently post updates on new features.
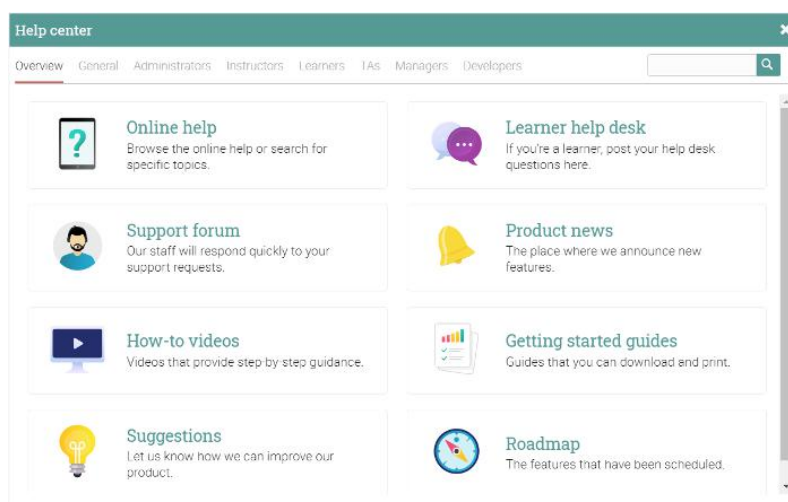
The searchable online help has topics organized by account type, includes detailed instructions with screenshots for most of them and because the Help Center is a pop-up, you can browse through the topics without having to leave your current page.
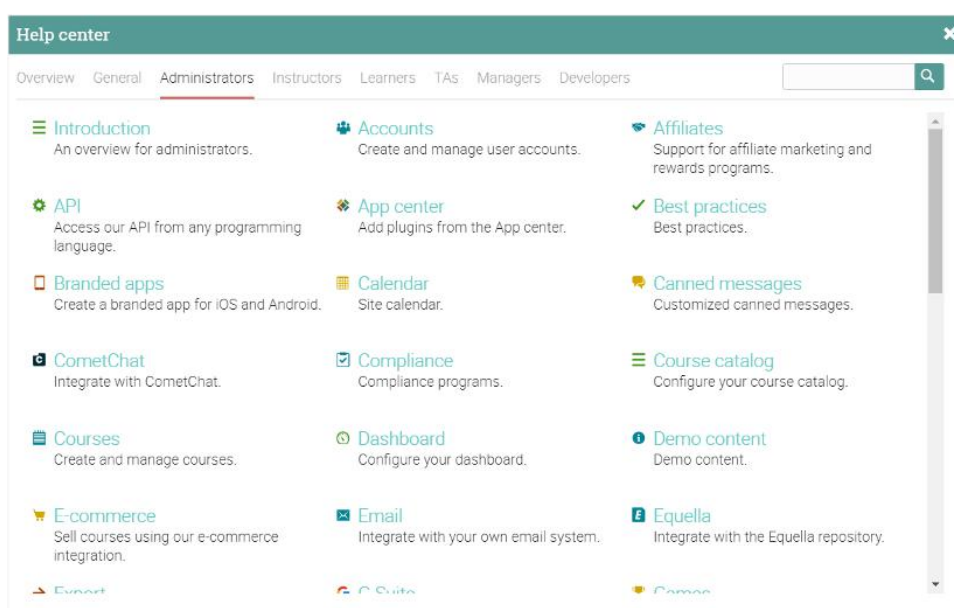
Profile

Your profile page shows your basic information, account details, photos, and more. The information that is visible depends on your account type and the portal's security settings. To start setting up your profile, go to the top right bar and click on the profile button. Then, click on the Edit button.
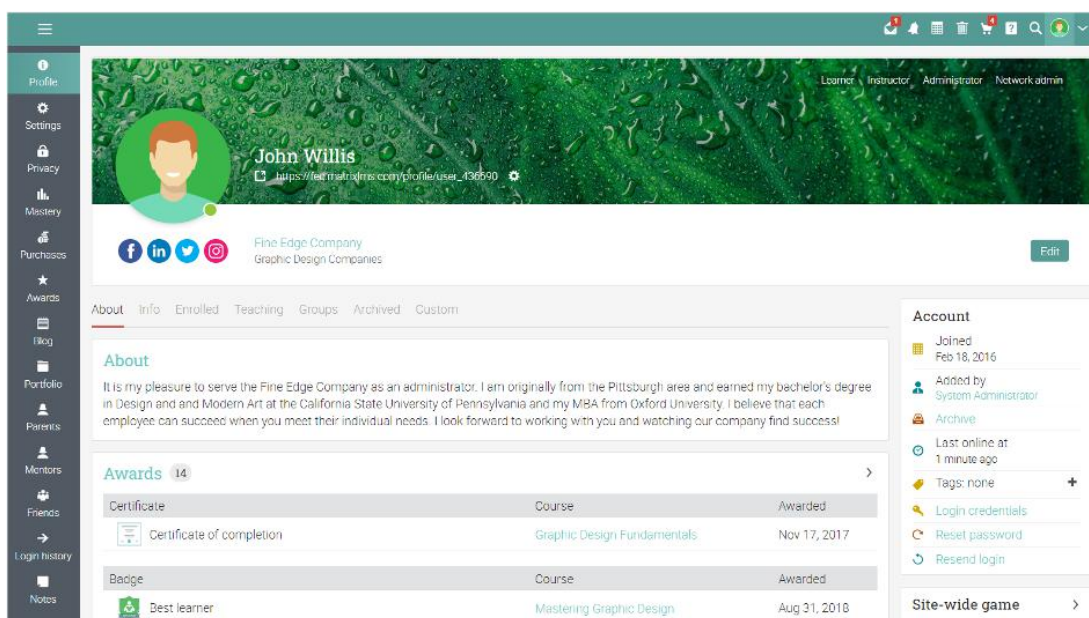
Go to the Settings tab in the left bar to choose different options related to your profile, such displaying your online status for learners or allowing users to request to chat with you.
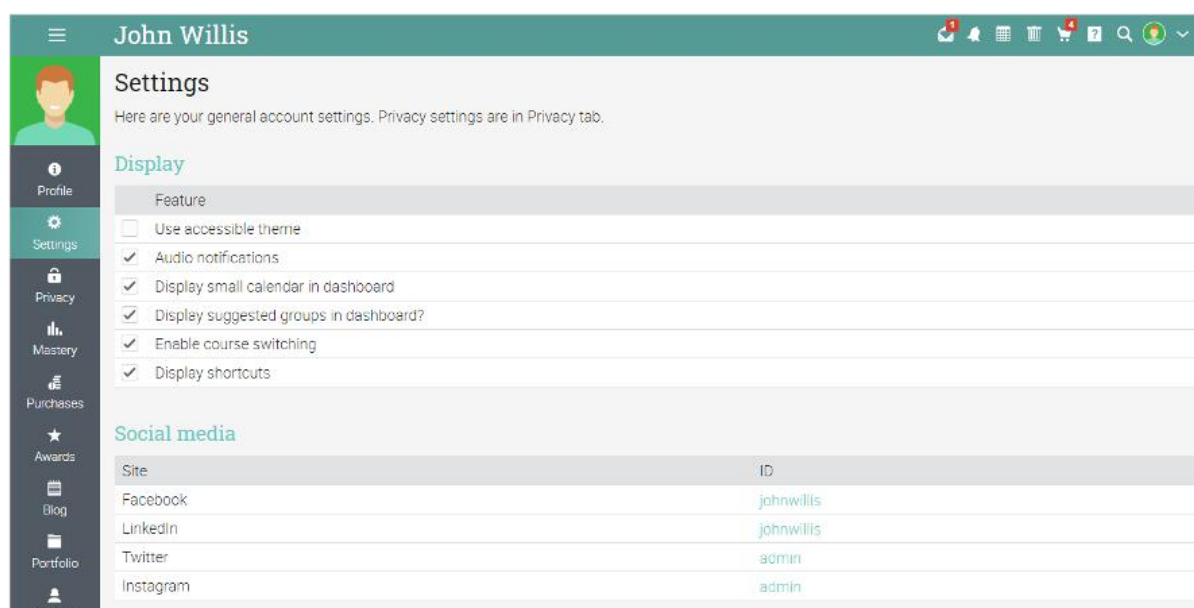
Change your language in the Miscellaneous section:

Configuring features

As an administrator, you are responsible for configuring the site, including enabling or disabling features. It's easy to do so by using the Admin menu in the left bar.
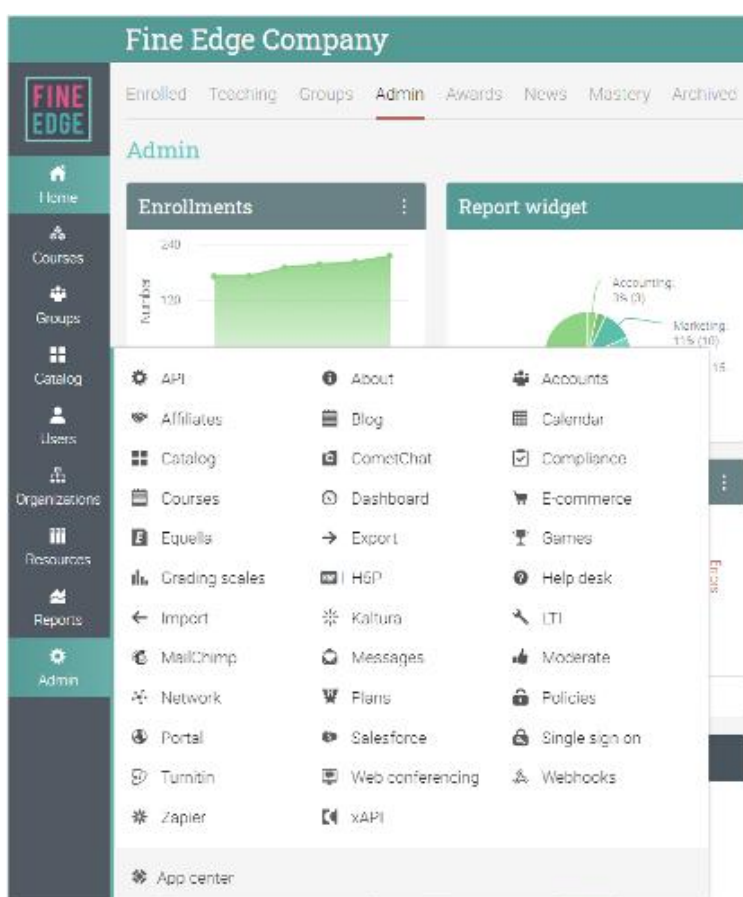
Features can be configured through our App center, which can be found under Admin/App center.
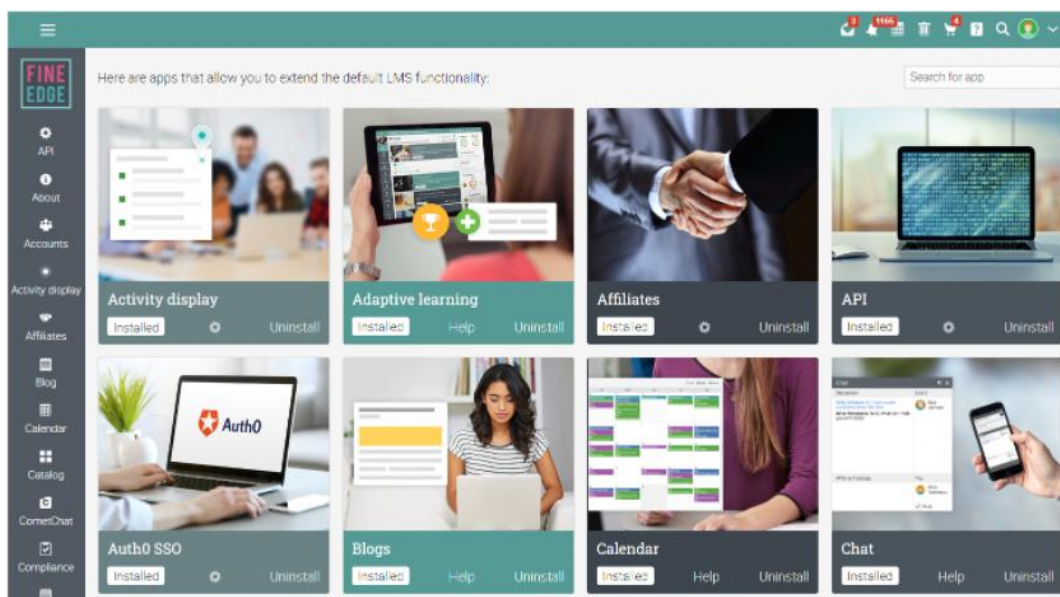
First, you must install the app:
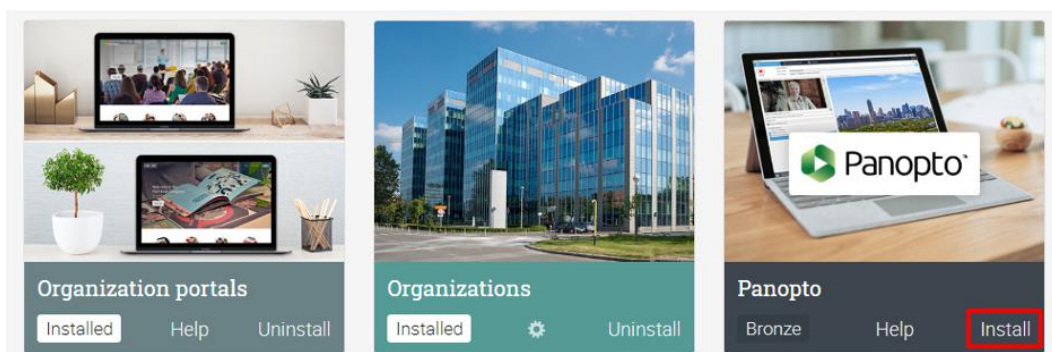
Then click on the Configure button to start setting it up:
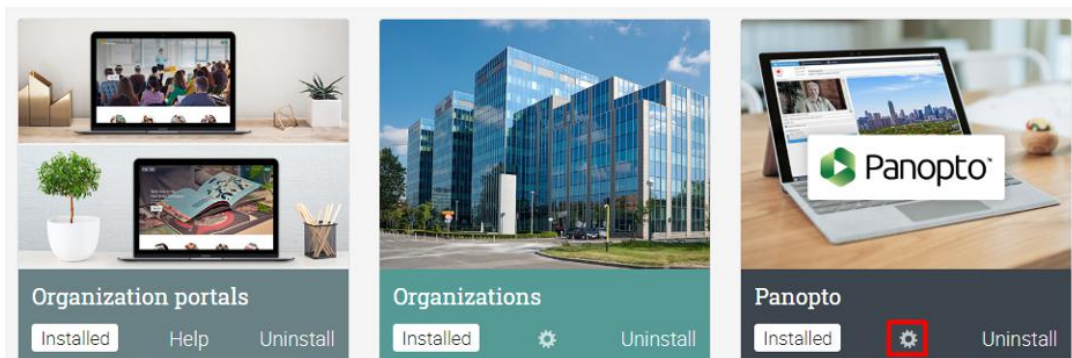
Here you can find features such as Reporting, Adaptive learning, or Teams. You can also find the list of available integrations, including Google Drive, Panopto, or Web conferencing.

Customizing the company portal

You can customize many aspects of your company's portal, including the color scheme, adding your organization's logo, and changing the terminology. In CYPHER, it's easy to configure what visitors and users see and you also have more advanced options such as adding Custom CSS.

Portal name, description, and details

To set up details about your organization, visit the Admin/About section. Here you can edit your organization's name, add a description and website, add a contact email, select your language, and more. To make changes, click the Edit icon.
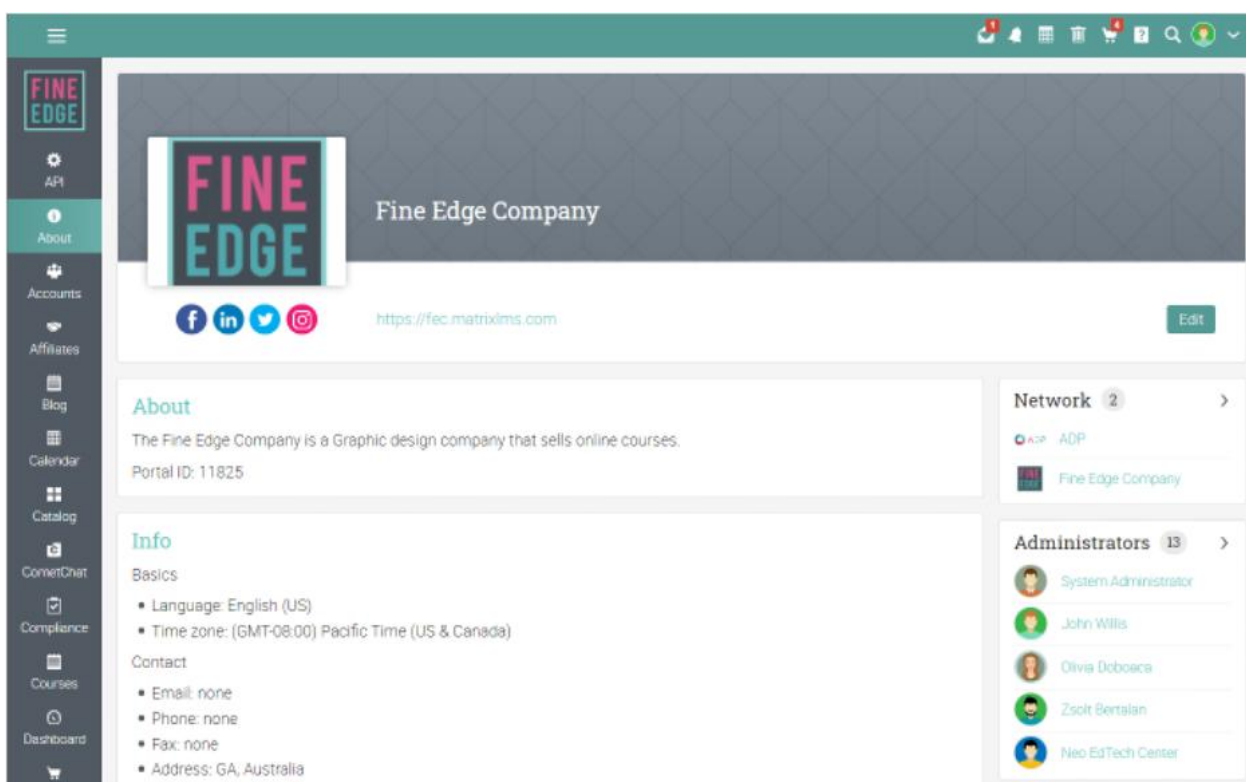
Portal customization

Click on Admin/Portal to start setting up your options.

The portal administrator page is split into separate categories so that it's easier to customize certain aspects of the site:

- **General** - set up your URL, color schemes, logo, and language.

- **Visitor view** - configure how your portal will look for your site's visitors, with options for portal type, title, logo, pages, pictures, menu, panels, and footers.

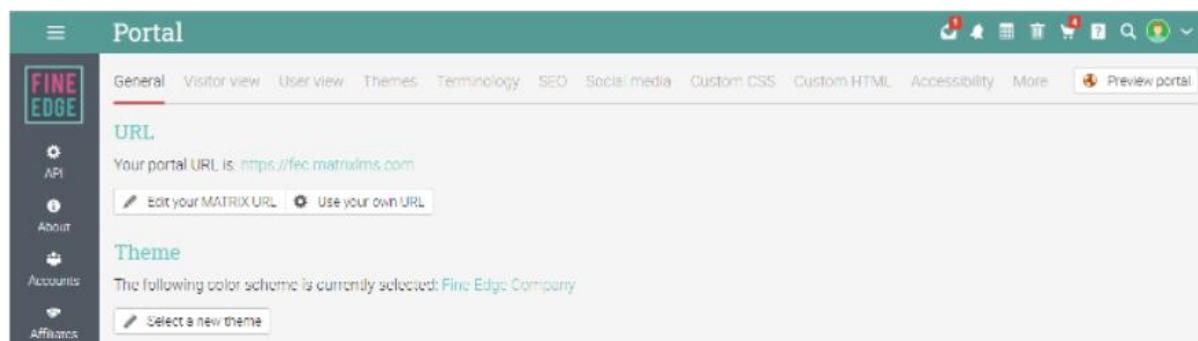- **User view** - configure how your portal will look for logged-in users, with options for avatar display, menu bar decoration, home left bar picture, home tabs, left bar, welcome pop-up, shortcuts and footers.

- **Themes** - customize the color scheme of the site by selecting or creating a new one.

- **Terminology** - customize the terminology of your site by adding one or more substitutions.

- **SEO** - choose if you want your site to be indexed or not, set up a meta-description, catalog URLs and keywords.

- **Social media** - set up which social media icons you want to show up on your portal, in both the visitor and user view.

- **Custom CSS** - you can use custom CSS in order to give your site a more personalized look.

- **Custom HTML** - you can use custom HTML to customize the site.

- **Accessibility** - enable portal accessibility options for users with disabilities.

- **More** - configure options session timeout, default video dimensions, Google Analytics, URL redirection, bottom HTM and Whitelisted IP addresses.

Now we will go over the most important options from these tabs that administrators need to know in the first phase of customizing the portal.

URL

This section displays the current URL of your portal. To change it, click "Edit your CYPHER URL", and select a new subdomain. We also provide a way to use your own URL, for which you can find instructions under the Portal topic in the Help Center.
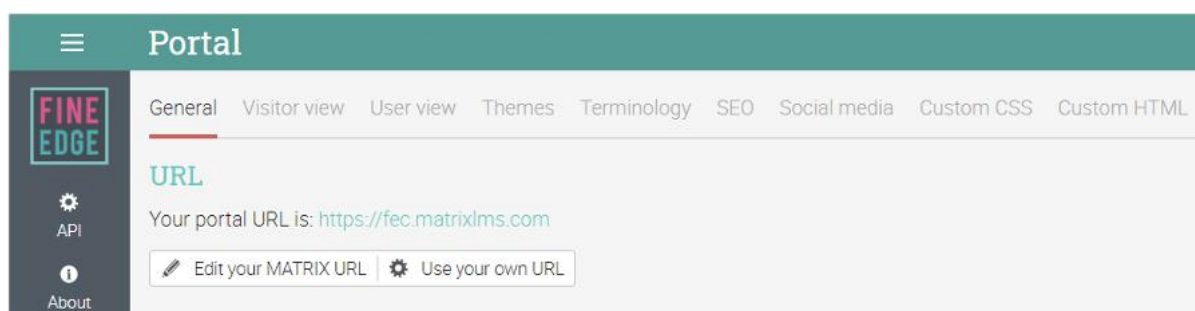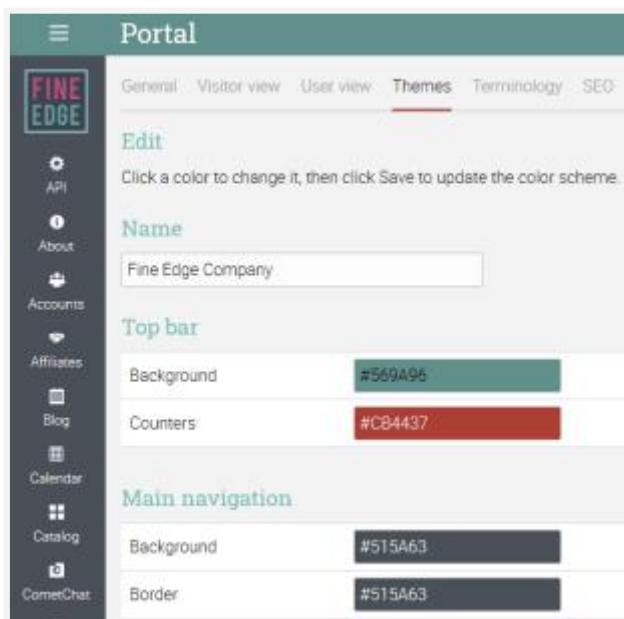

Themes

Choose between our built-in color schemes or you can create/edit your own custom scheme using the "Add custom theme" button:
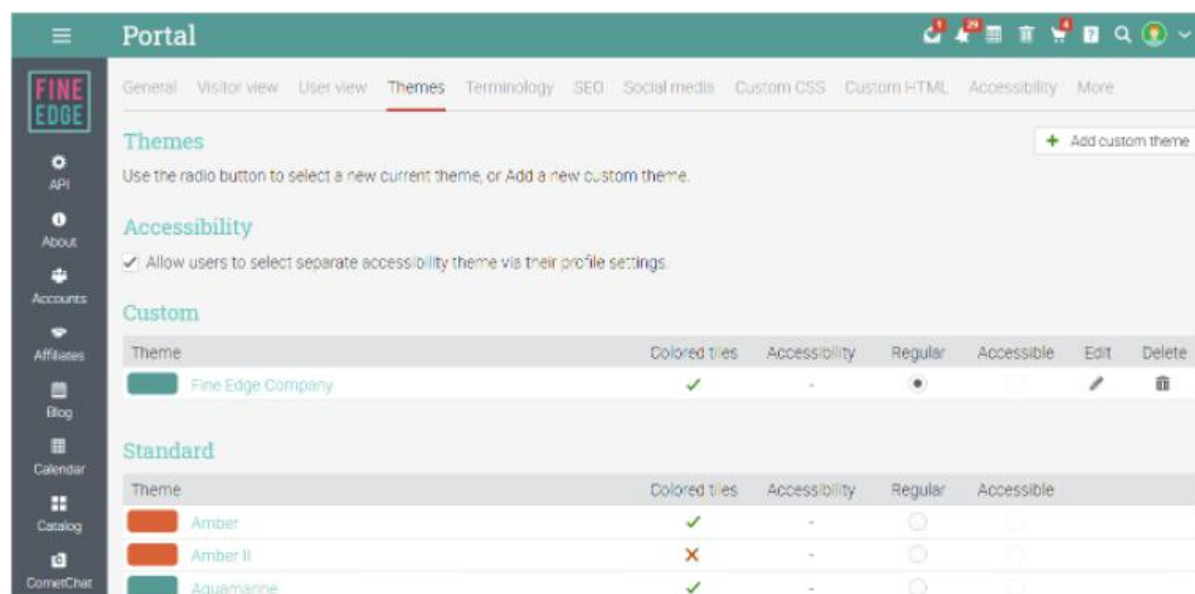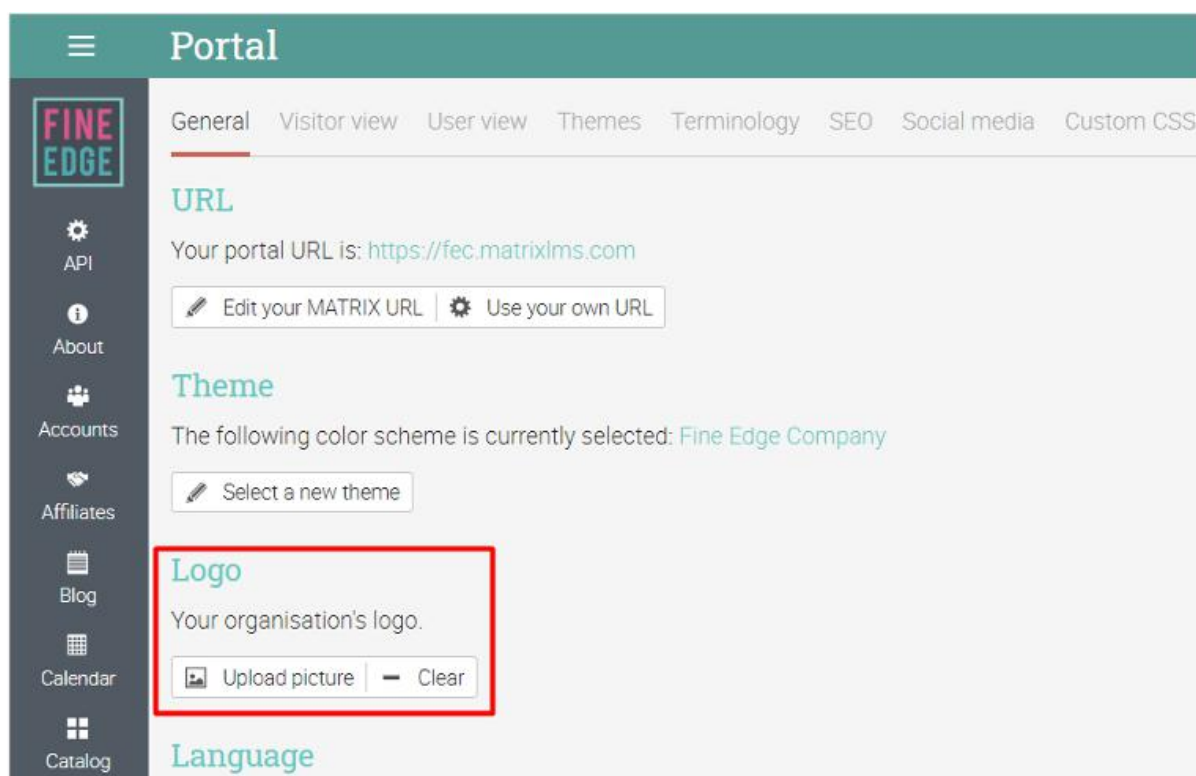
Then select the color values for each graphic element using either the color picker or by directly entering the hex values into the input boxes.
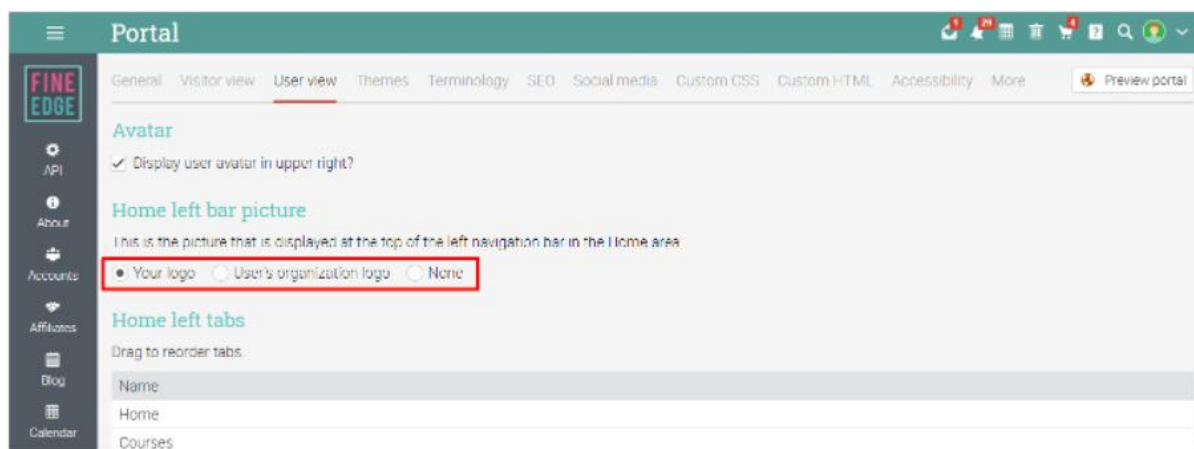

Logo

To upload a logo, select it from your computer, then click Save.

You can select if the logo should be shown in the home page left bar by clicking the appropriate check box in User view.

Portal pages

You can configure Portal pages under Visitor view. Portals have default pages such as Calendar, Catalog, News, or Contact. Only pages that are enabled show up in the carousel and each one can be edited separately. You can also click on Add to create a custom page.

Portal visual editor

The visitor portal can also be customized using panels, changing the header, and adding a custom footer. To customize your portal, click Edit under "Portal visual editor".

Portal panels

Currently, we have support for the following types of panels:

Carousel

The carousel option allows you to add custom pictures, text, HTML, and action buttons. To add a new slide, click Add slide.
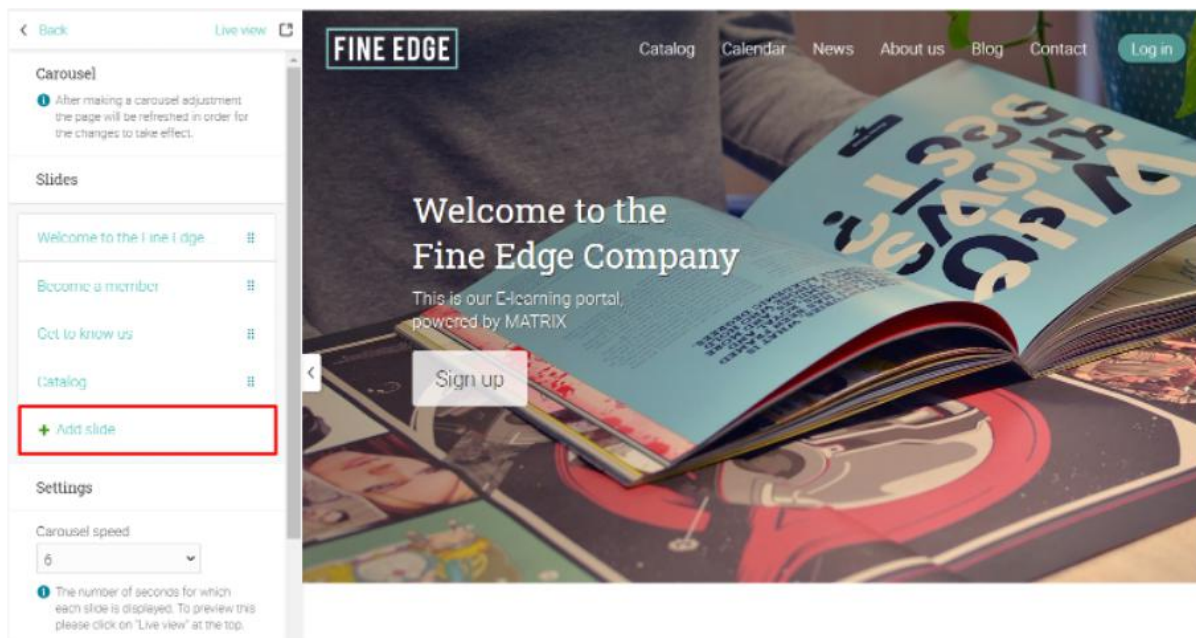
Counters

This option allows you to add a graphical background with up to three counters with relevant information for your company. Enter the text and the numbers for each counter, choose a picture of and click Save.
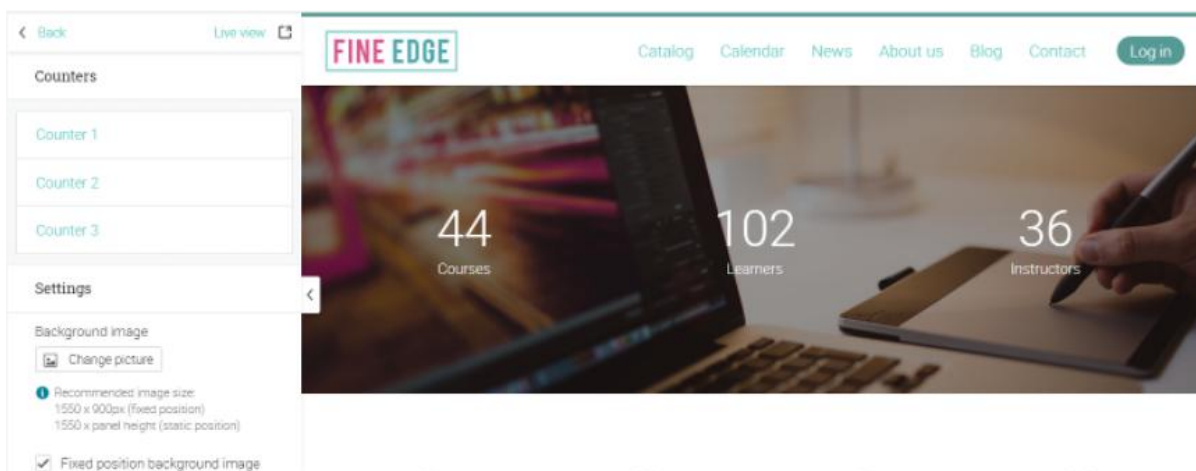
Simple text and button

If you want to separate two panel types that are very graphical, you can add a colored background with text and an optional button.
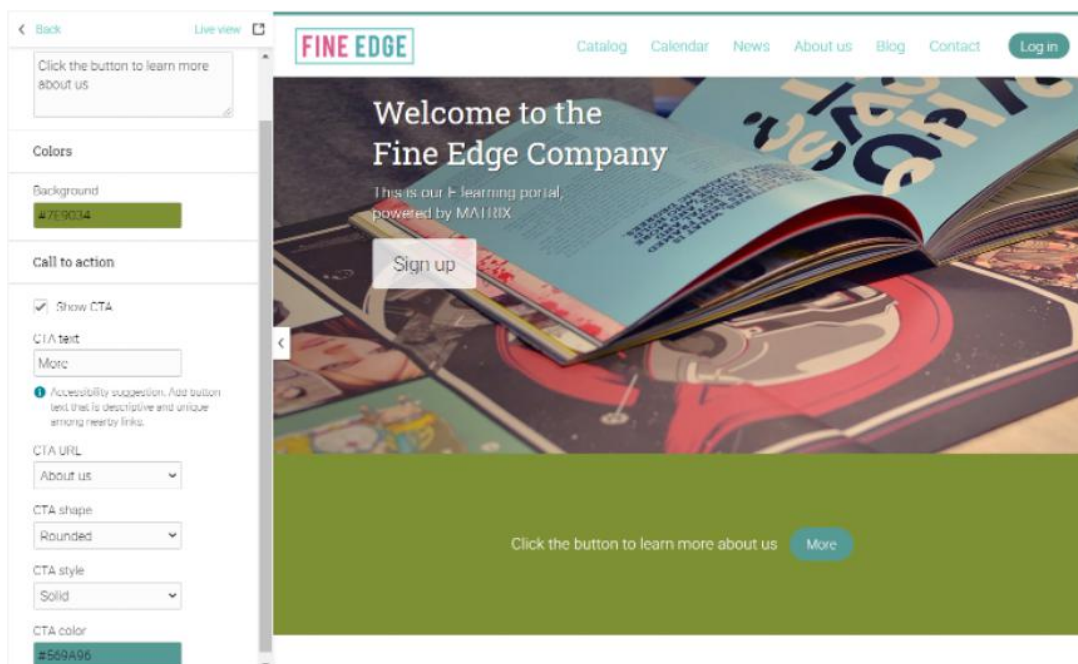
Image blocks

You can add a panel that contains image blocks with text and call-to-action buttons. You can upload your images, add the text, and you can select the destination page of the buttons.
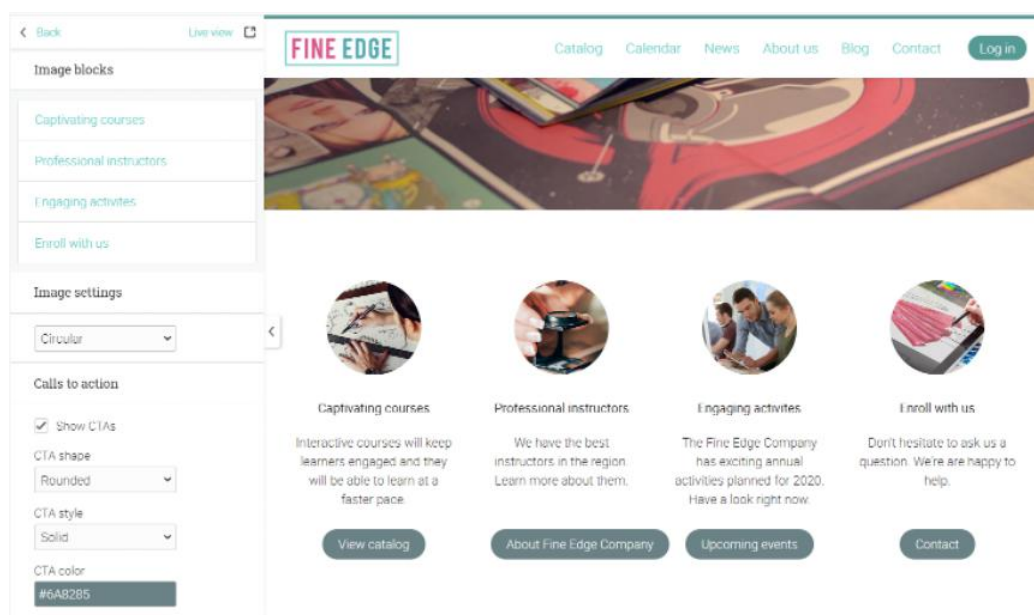
Footers

You can customize the footer area of your portal. To add a new footer, click on Add, enter its name, URL, and choose whether or not a new window is displayed when the footer is clicked, then click Save.

Terminology

You can customize the terminology of your site by adding one or more substitutions under the Terminology tab. These substitutions apply to all built-in text which appears on tabs, buttons, headings, instructions, and tips. Click on Add, then enter the original text and its replacement.
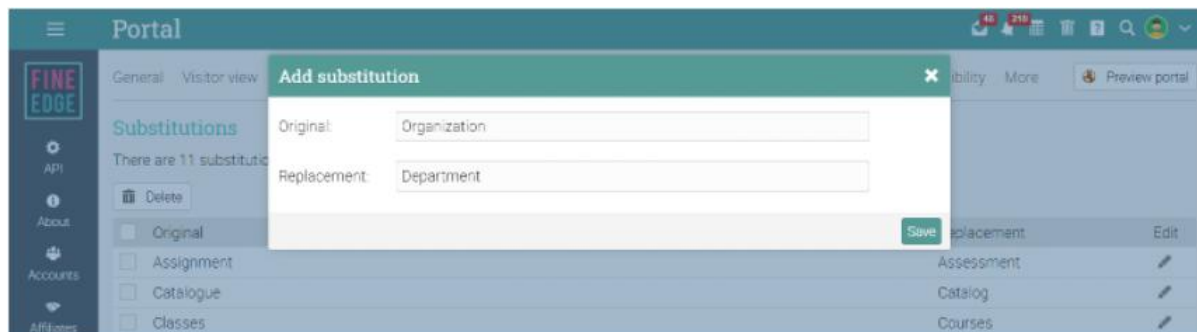
Here is how a business portal can look for visitors:
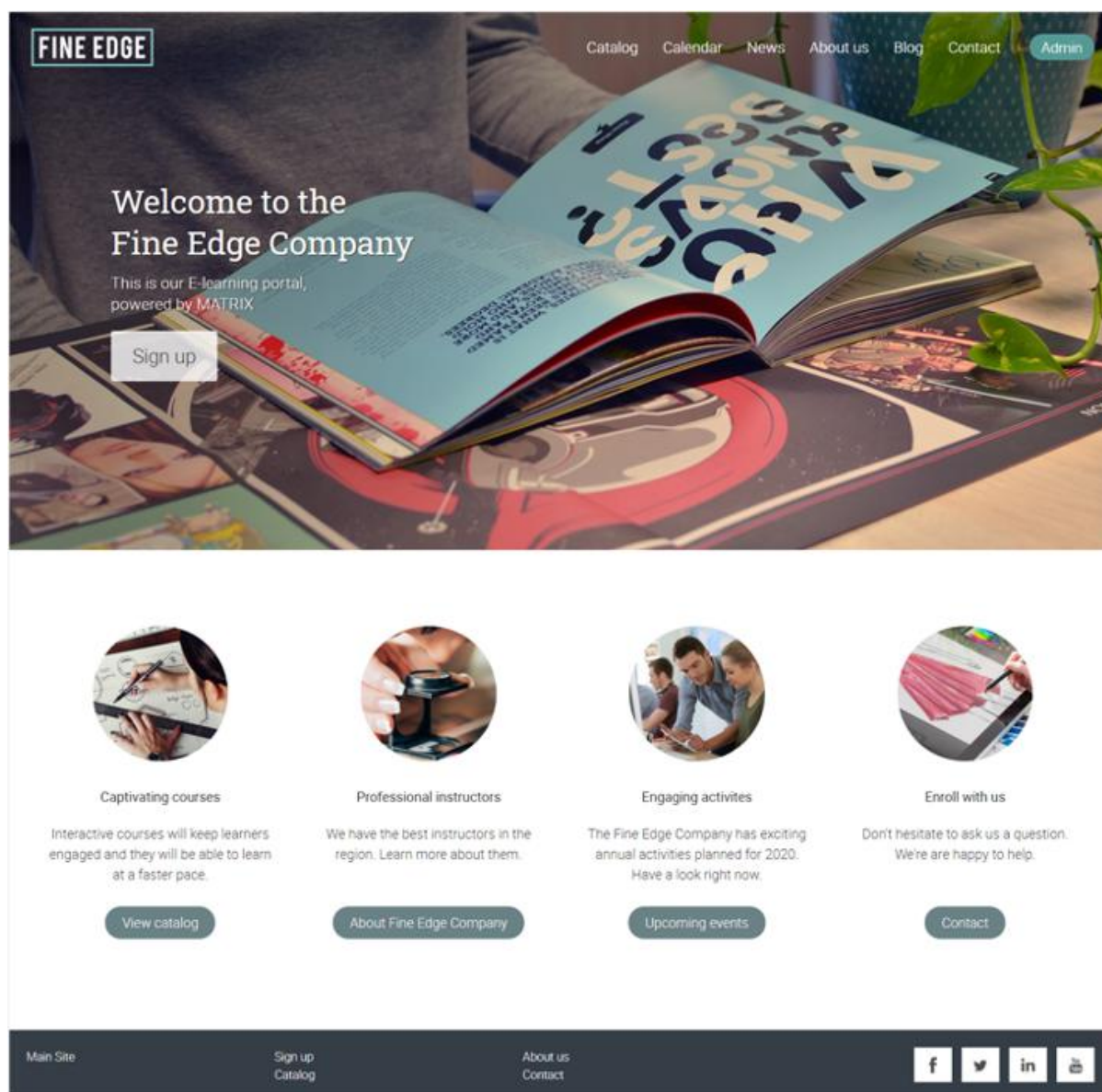
Setting up policies

There are many policies that you can set for your site, such as the features that learners and instructors can access. It is one of the most important things for an administrator to do. Go to Admin/Policies to start setting up your options.
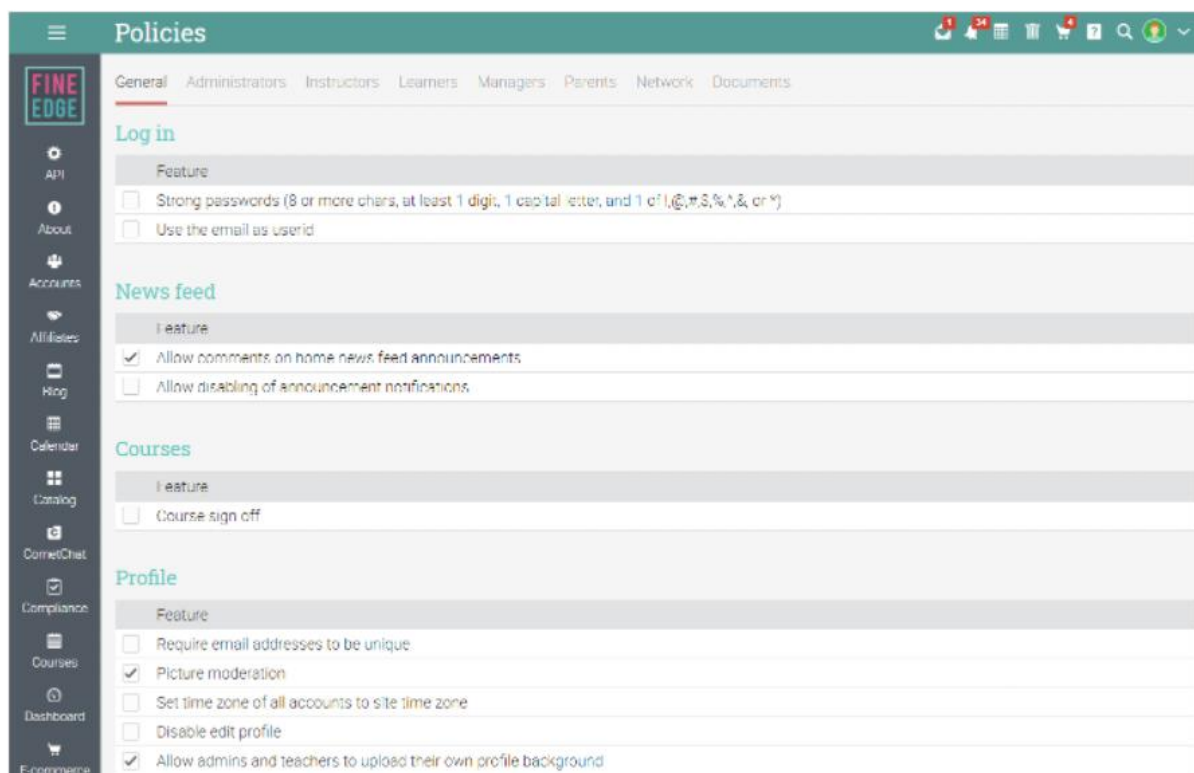
Here are more details on some of the options:

Monitoring

If enabled, you can create monitor accounts. Monitors are read-only administrators that can access most pages of a site but cannot change anything. If you enable monitoring, you can also enable it for use by instructors, in which case they can monitor the communications of learners in their courses.

Prevent simultaneous logins

If this feature is enabled, a learner can only be logged on via a single session. When they start a new session, any of their previous sessions are automatically terminated.

Let members know that communications are monitored

If you check this option, members will know that their communications are being monitored. They will see a small notification: "your company monitors communications for offensive language" when composing messages or using chat.

Set time zone of all accounts to site time zone

If enabled, you can set all user time zones to the time zone of your company.

## Allow disabling of announcement notifications

If enabled, users will be able to turn off notifications from announcements.

Configuring the course catalog

The course catalog lists all the courses that you wish to offer learners. If you have e-commerce enabled, training items may be purchased directly from the catalog. To browse the catalog, click Courses/Catalog.
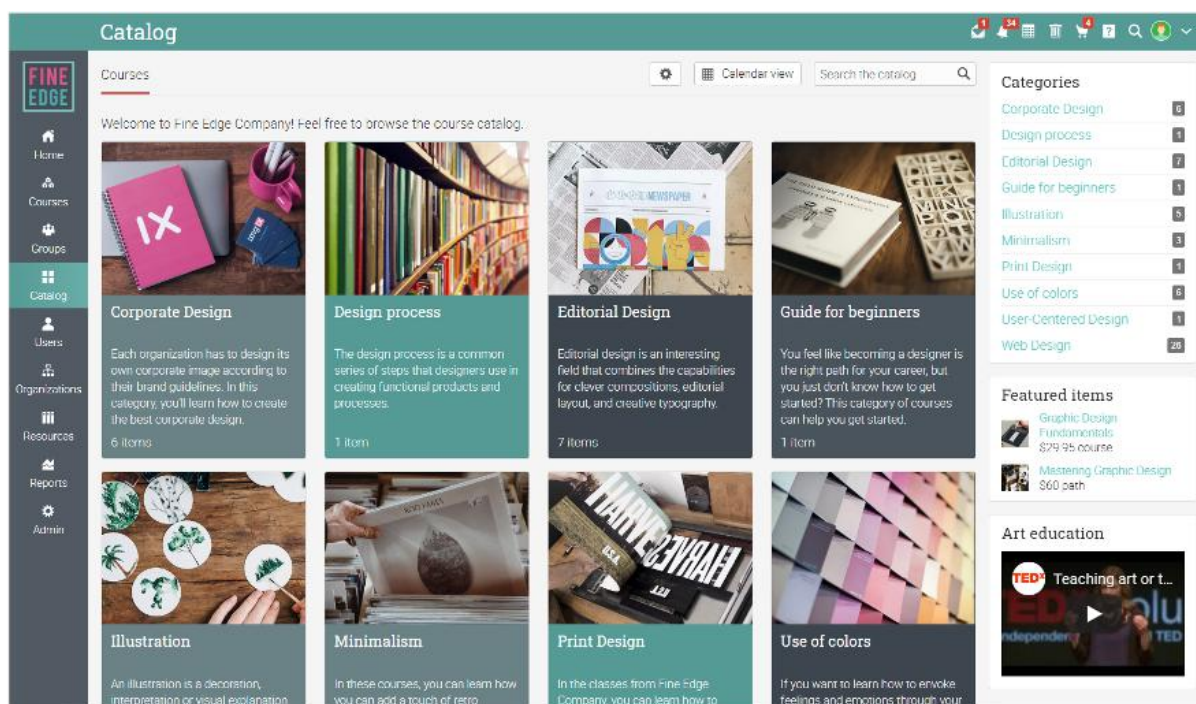
Items are organized by categories and subcategories.
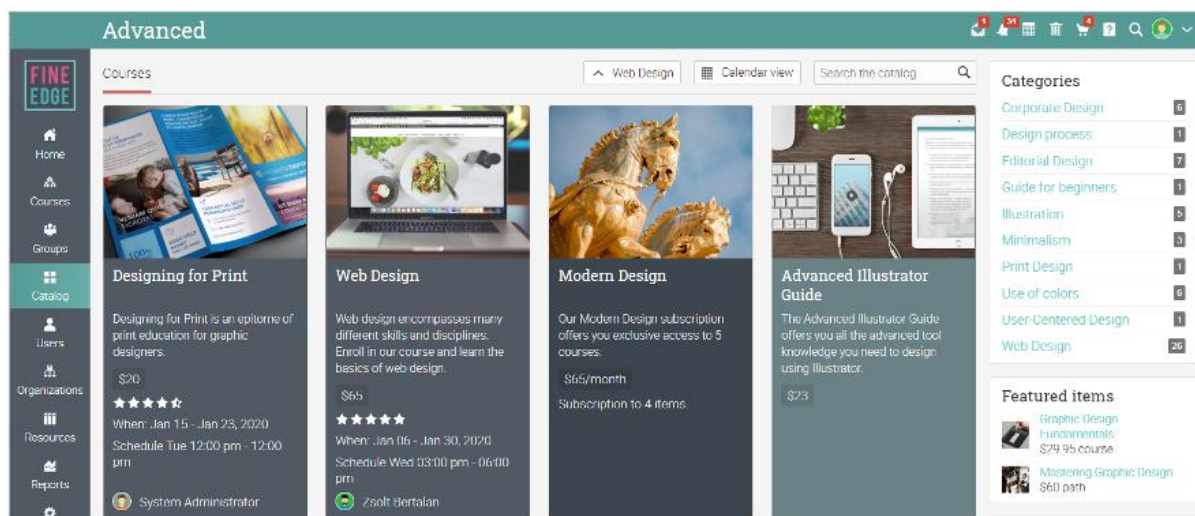
To configure the course catalog, visit the Settings area. Your options are as follows:

- **Options** - you can enable catalog search, the catalog calendar, and location filtering.
- **Format** - choose between Flat, Hierarchical, or Graphic.
- **Category ordering** - choose between Alphabetical or Custom. If you choose Custom, you can reorder the categories using drag and drop.
- **Course ordering** - choose between Alphabetical or Custom. If you choose Custom, you can reorder the courses using drag and drop.
- **Displaying short descriptions** - you can choose to display the short description of categories and items on their tiles.
- **Show sections in each module** - if enabled, the list of sections will be displayed on the catalog page of the course.
- **Only show open enrollment courses in visitor catalog** - you can set courses to have an open enrollment for visitors of your site. With this option they can only see what is available to them.
- **Hide old courses** - hide courses that have started over a week ago.
- **Show time zone** - include the course time zone in the listings.
- **Display courses for default organization in all catalogs** - if you have enabled multiple organizations for your platform, the default organization's courses will appear in all catalogs.
- **Only show pricing on catalog page, not on tiles or listings** - if you have e-commerce enabled, only show pricing on catalog page, not on tiles or listings.
- **Right column** - you can enable the right column in the catalog to show the list of categories, featured items, and boxes.
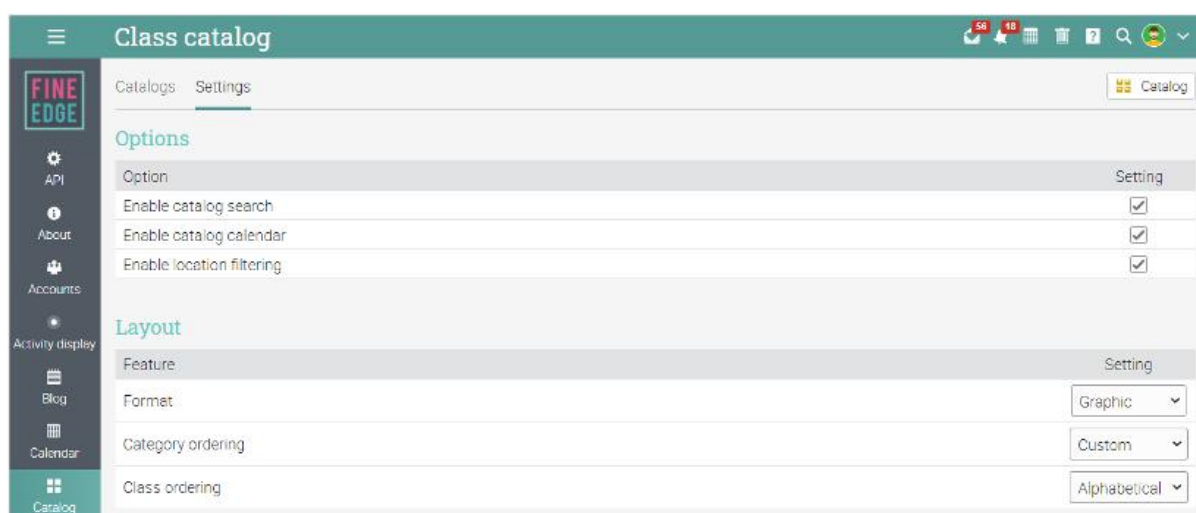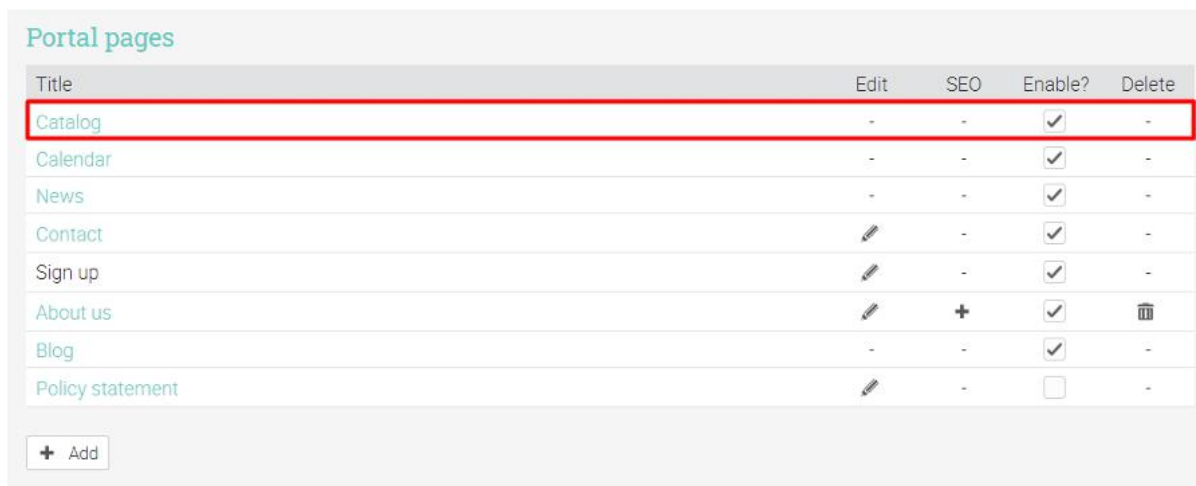
Categories

All currently used categories and subcategories are listed in the Categories section of the local catalog. You can change the descriptions and the picture associated with a category. You can even add a metadata description and keywords for a category, under SEO Metadata.
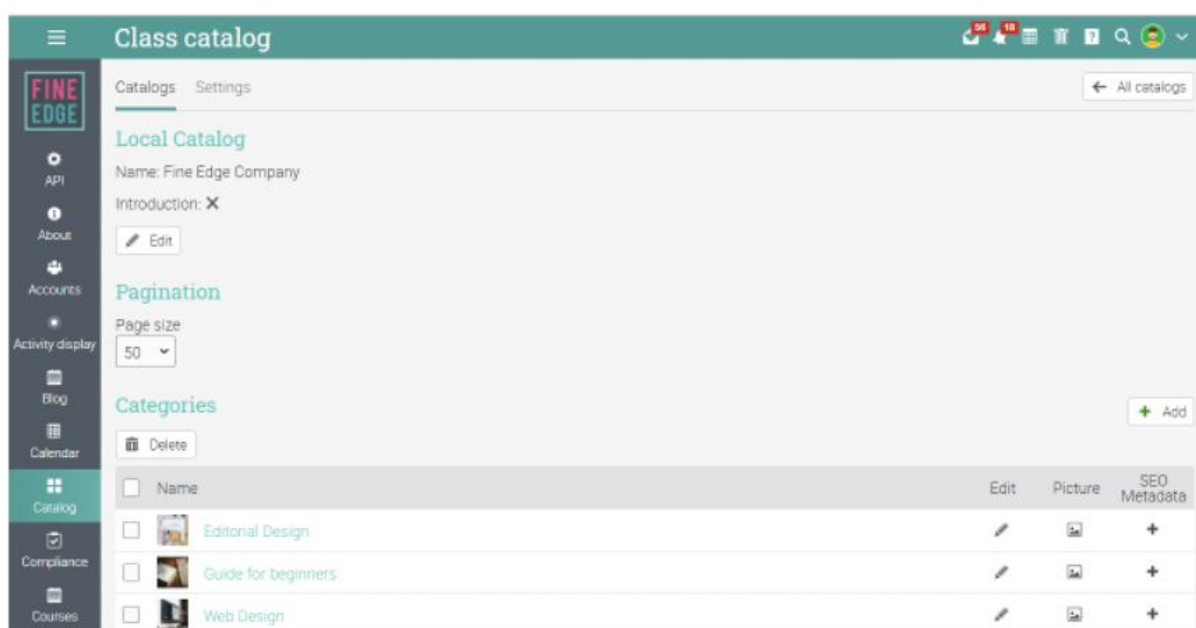
Browsing the catalog from your portal

To allow portal visitors to browse the catalog, go to Admin Portal and find the Visitor view tab. Enable Catalog from the Portal pages section.

Portal pages

| Title	Edit	SEO	Enable?	Delete
Catalog	-	-	✓	-
Calendar	-	-	✓	-
News	-	-	✓	-
Contact	✏	-	✓	-
Sign up	✏	-	✓	-
About us	✏	+	✓	🗑
Blog	-	-	✓	-
Policy statement	✏	-	☐	-

+ Add

Creating accounts

Everyone who wants to use your site must have an account. The type of accounts that can be created in CYPHER are:

- **Learner** - can enroll in courses, communicate with instructors and friends, use collaboration tools.
- **Instructor** - can create and teach courses, create and grade assessments, communicate with learners.
- **Administrator** - has full privileges on the site, can customize the site, set policies, create accounts.
- **Partial administrator** - can administer only certain aspects of the site.
- **Teaching assistant** - can help instructors run courses but cannot change course content or delete a course.
- **Manager** - can generate reports for all the learners in the same organization but cannot change content or create courses.
- **Monitor** - read-only administrator that can access most pages of a site but cannot change anything.
- **Mentor** - users that primarily provide personal assistance to other users.

Adding accounts

Go to Admin/Accounts to find your options for adding accounts:
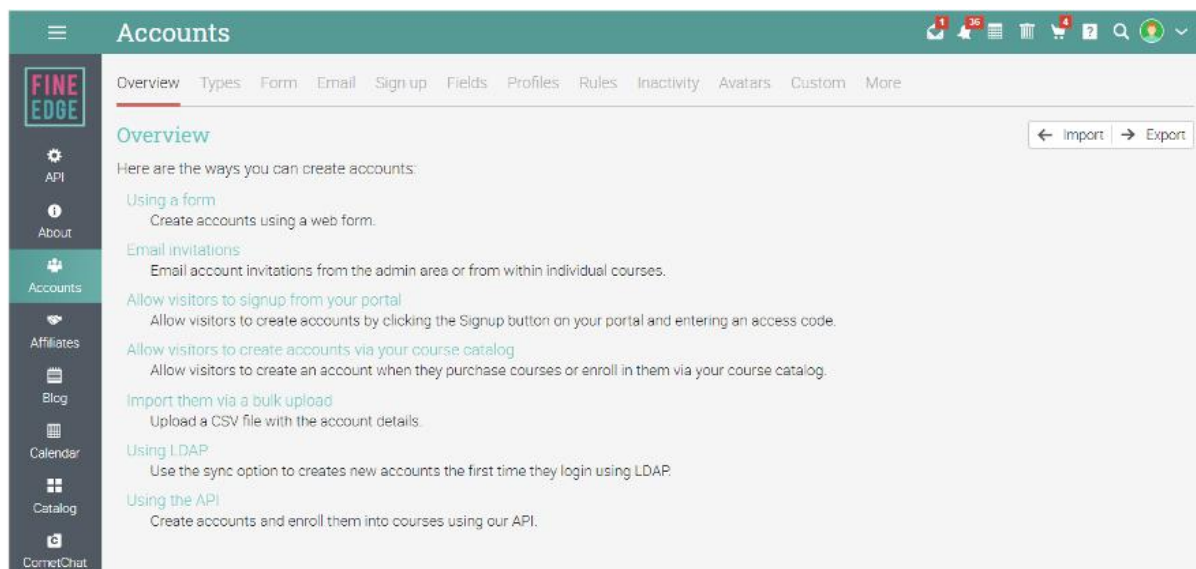
Add accounts using a form

This option allows you to quickly add accounts using a form. To start adding accounts visit the 'Form' tab. Select the initial type of account you want to create, whether you want to send login instructions, whether you require the users to change their passwords when they first log in, and the approximate number of accounts you want to add.
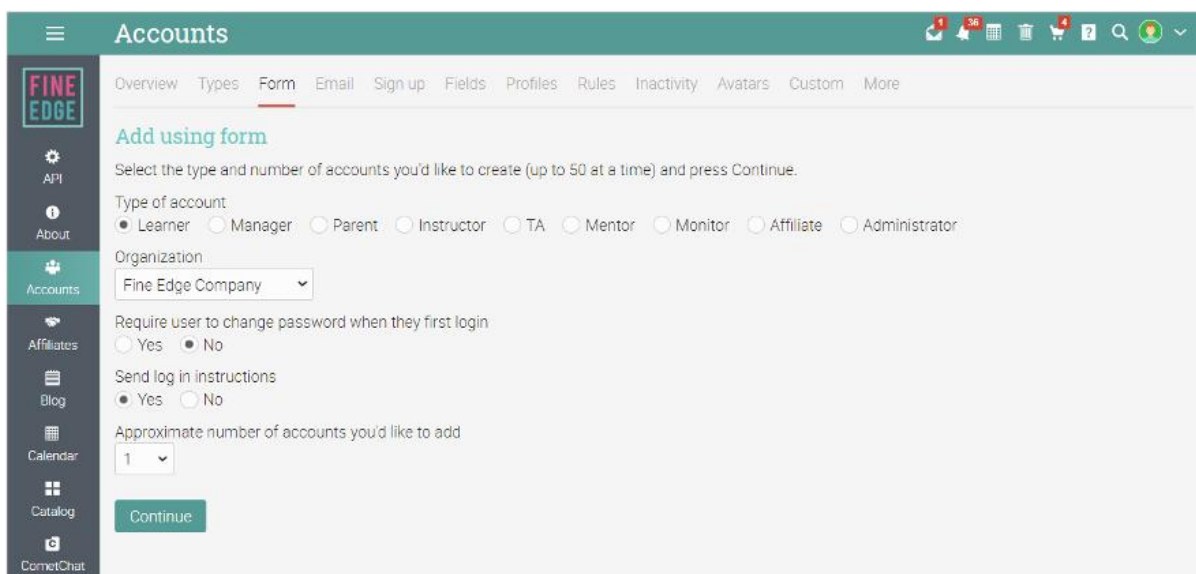
Email invitations

To invite users via email, visit the Email tab. Select the initial type and approximate number of invitations that you want to send, then click Continue.

The email invitation is sent but the account is not created until the user accepts the invitation and then goes through the normal sign up process. You can see a list of invited people by going to the Users catalog in the left bar, under the Invited tab. Resend the invitations if needed.

Configure sign up

Generate access codes that allow users to create accounts. To start configuring sign up, visit the Sign up tab under Admin/Accounts.
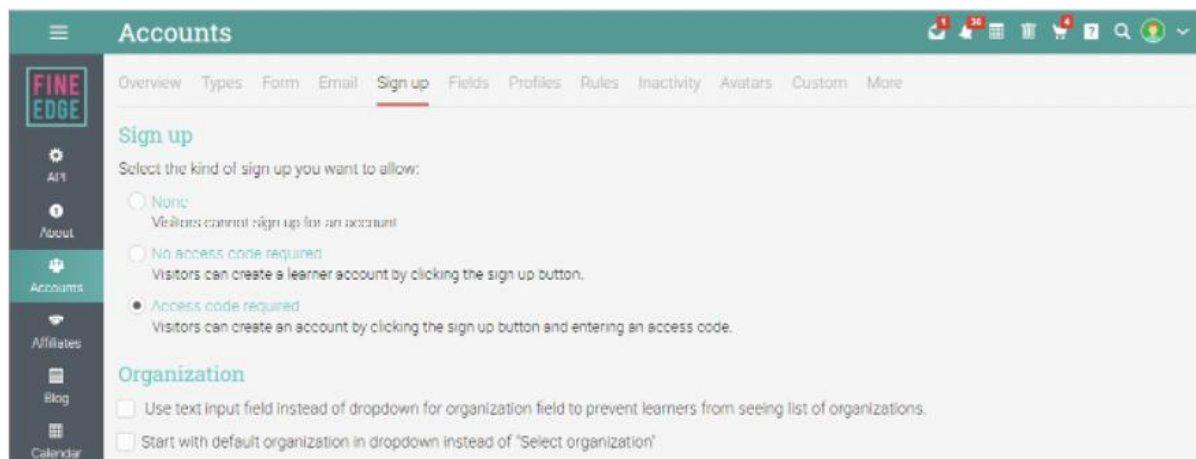
If you choose the sign up option without an access code, users can create accounts just by clicking the Sign up button, then entering their account details. If you want to use access codes, you can set them up in the Access codes area. Each user type can have its own access code. Codes can be either active all the time or for a limited period.
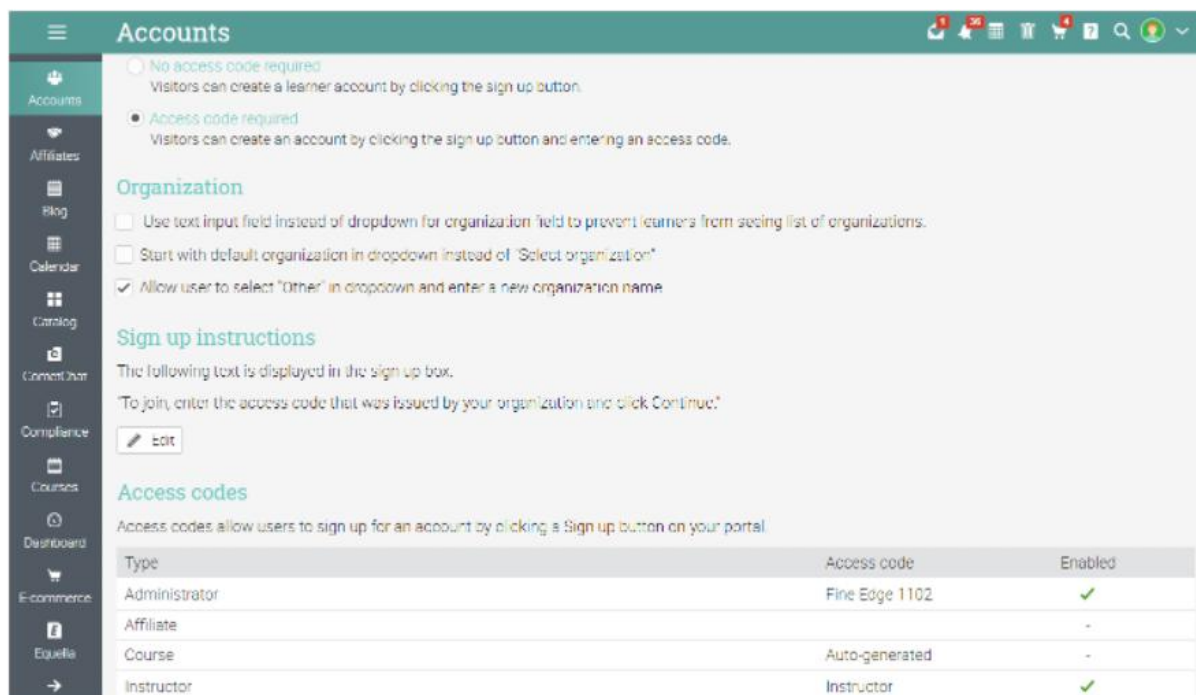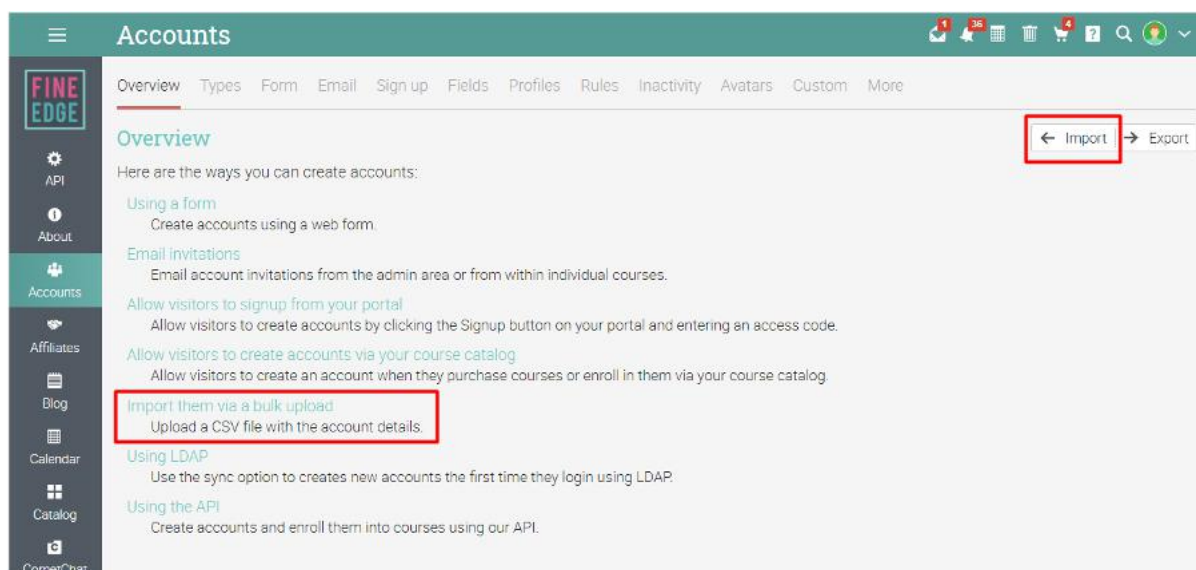
People can then join your site by clicking the Sign up with an access code option, entering the code and the required account information.
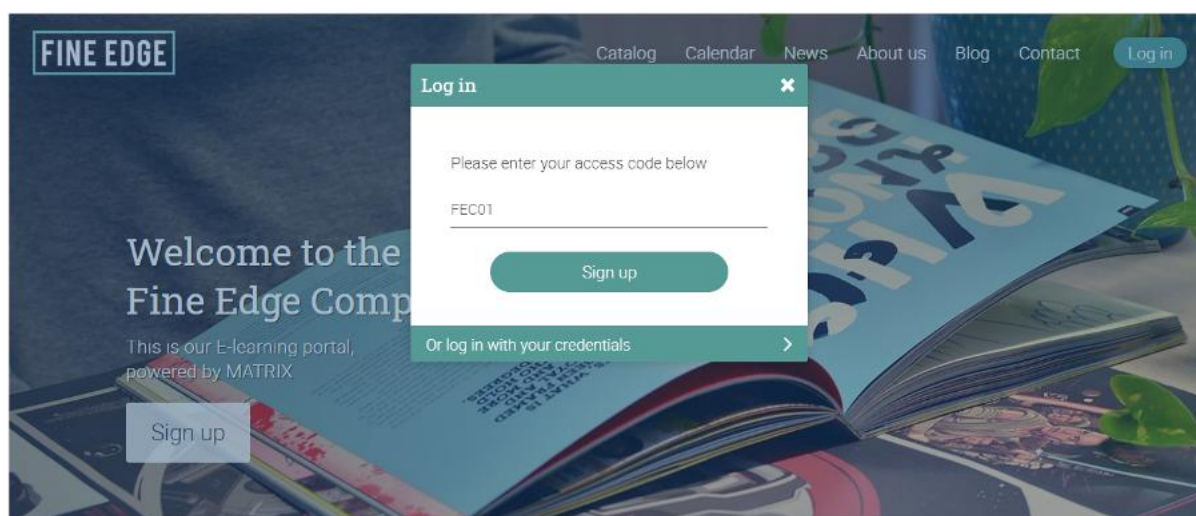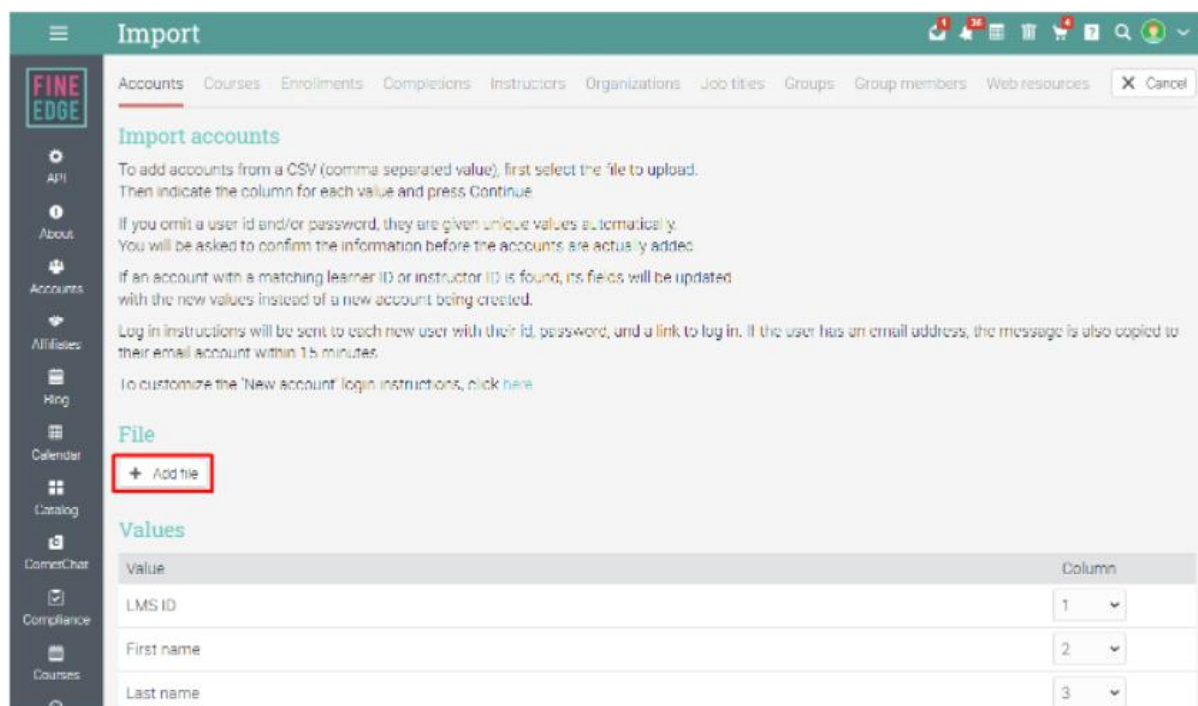


Import accounts from a file

This option allows you to quickly create or update accounts by importing the information from a comma-separated value (CSV) file.

Select the initial type of account you want to create, then choose the file from your computer that contains the CSV rows and indicate which value is in which column.

Every field except for the first and last name is optional. If you omit a user ID and/or password, they are given unique values automatically. You have a few more options such as requiring users to change password on their first login, then click Continue.
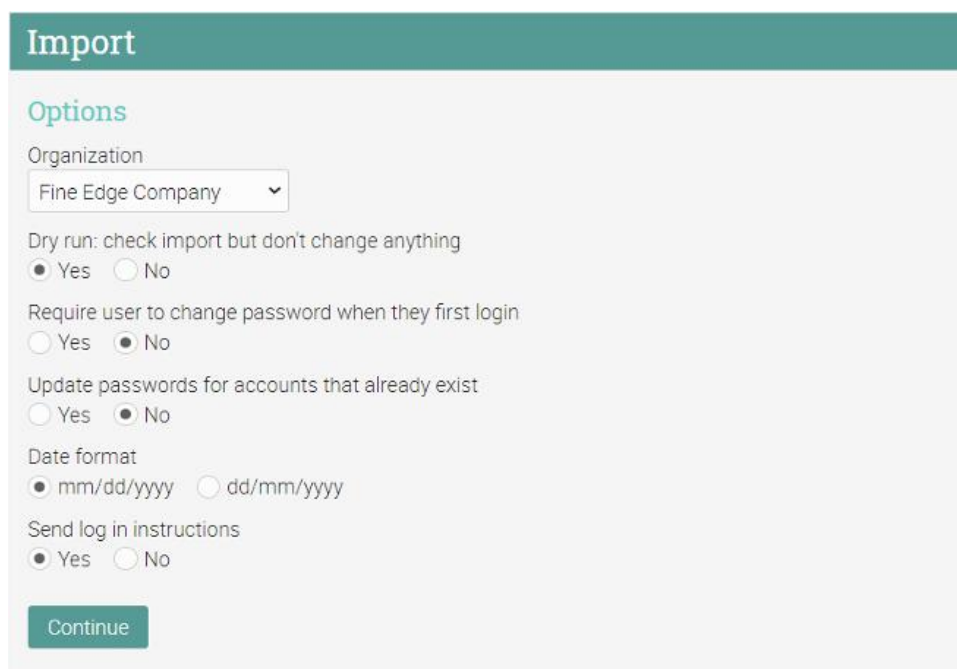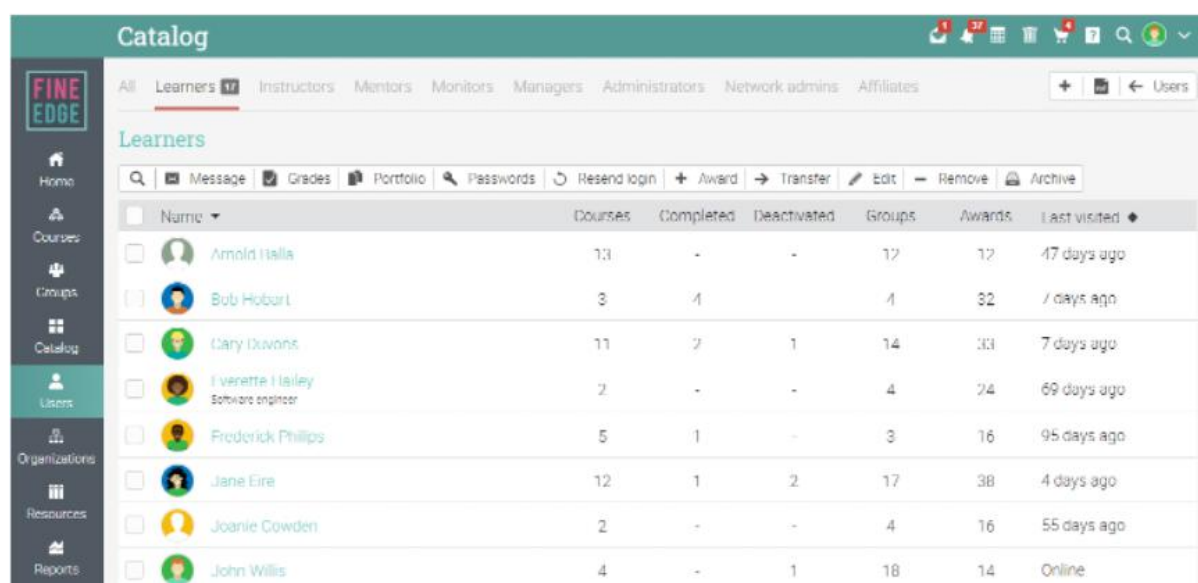
Managing users

You can see an overview of all users in your company by visiting the Users Catalog. Click on a category to see more details about a user group.


For example, if you click on Learners, you can perform several actions such as: sending messages, viewing their scores, award badges and certificates, archive learners or even removal from the platform.

Using automation

Automation allows you to set up rules that should be performed when learners enroll in groups, complete courses and learning paths. For example, you can define rules that trigger actions such as sending a custom message when learners enroll in a course or sending a notification when an account becomes inactive. Administrators are usually responsible for setting rules for accounts, while instructors add rules for courses and learning paths.
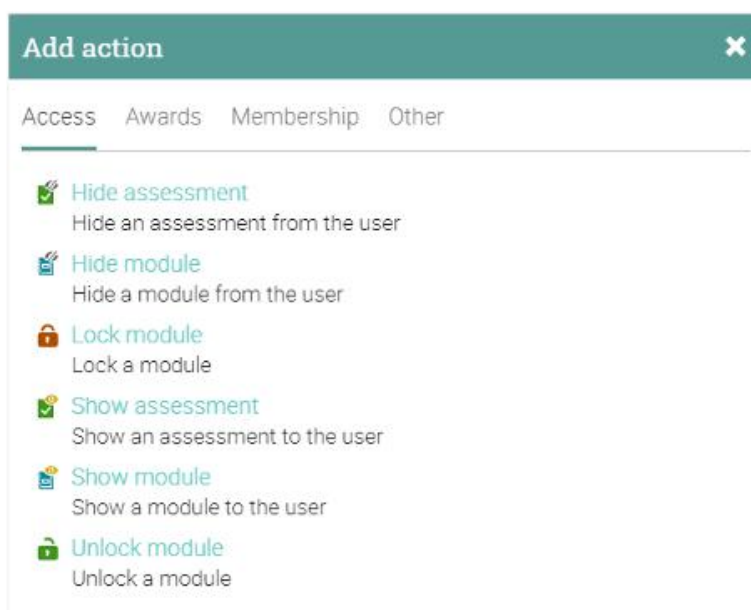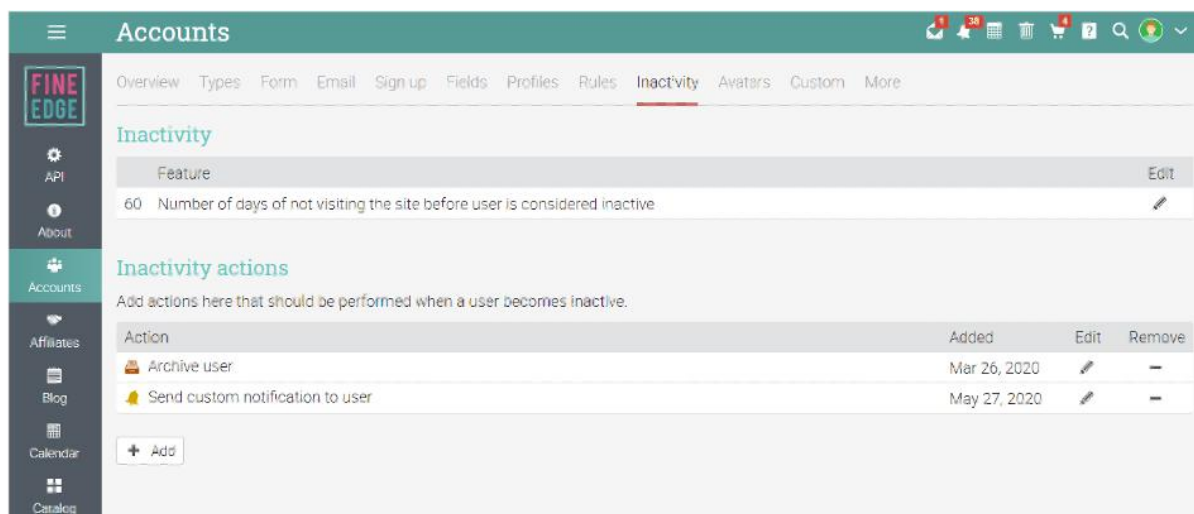

Adding rules for accounts

You can define actions that occur when accounts are created. Accounts rules include actions that are triggered when users are added and when users are inactive. To add rules, visit the Accounts/Rules" section.
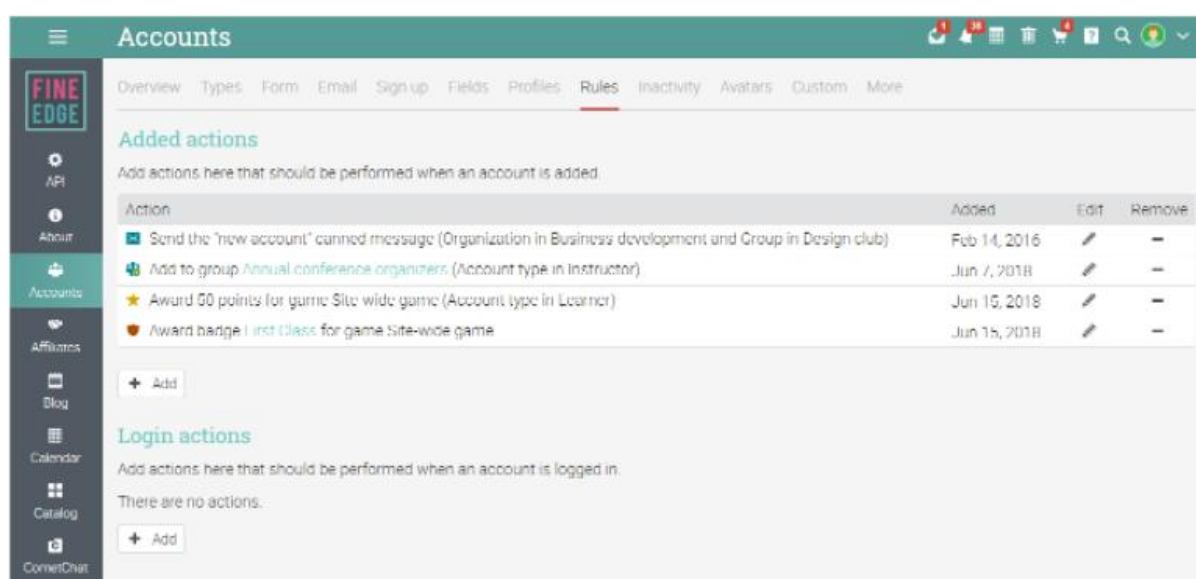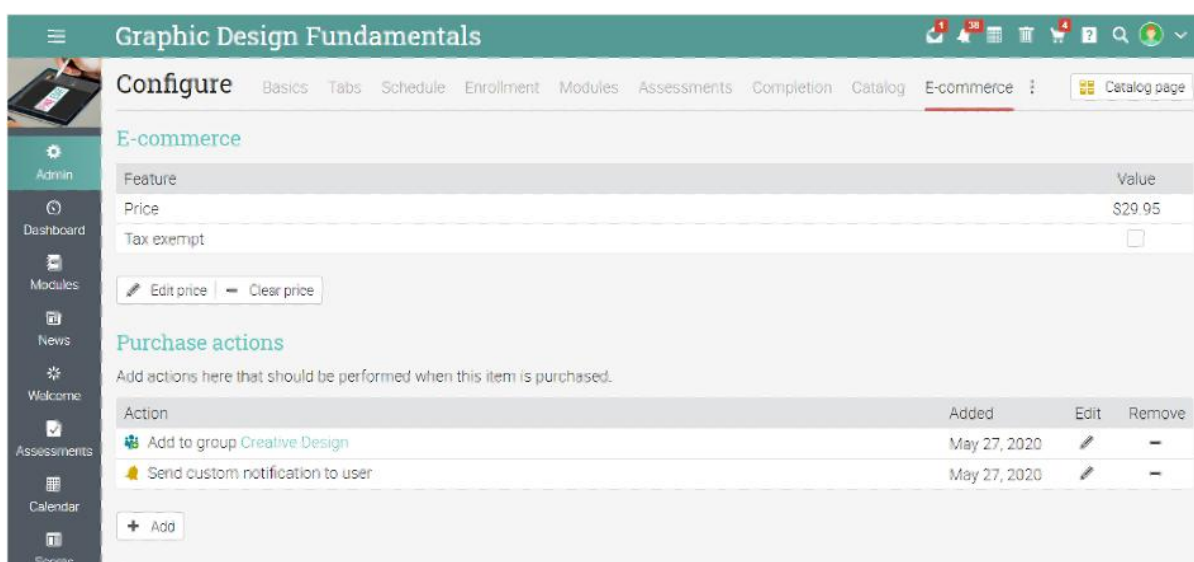
To add inactivity actions, visit the Inactivity tab:

Adding rules for e-commerce

If you have e-commerce enabled, you can also set up e-commerce rules for courses, subscriptions, bundles and so on. For example, to add a purchase action from the E-commerce tab in the course configuration area.
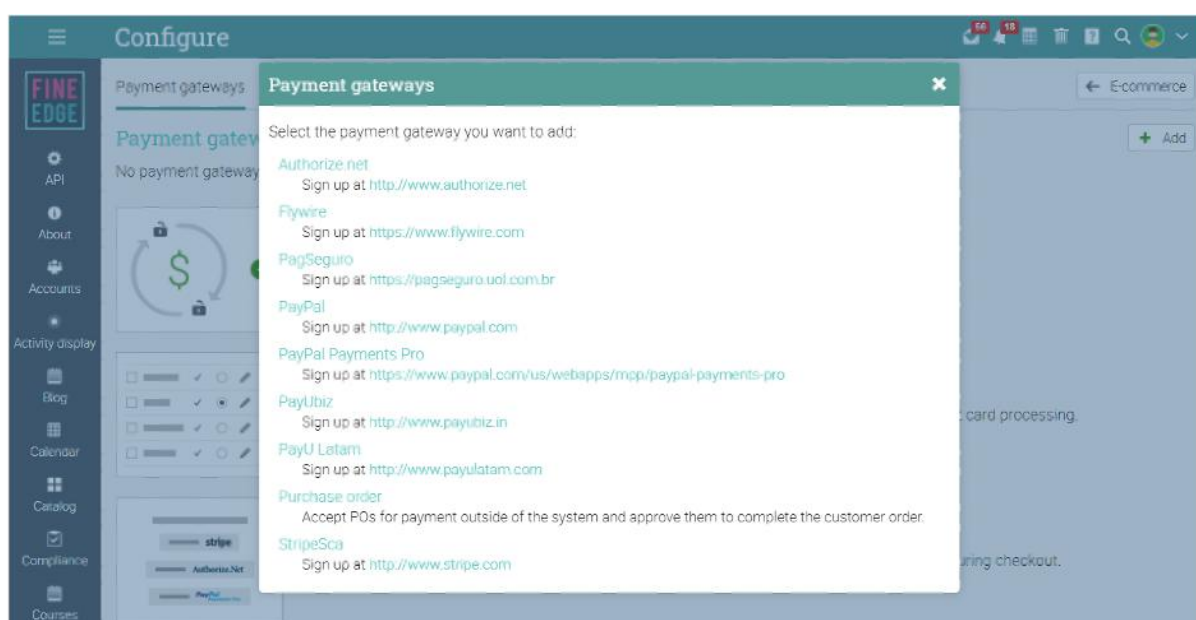
Configuring e-commerce

The e-commerce feature allows companies to sell courses, subscriptions, bundles, and digital media through their CYPHER portal. Visitors and users can browse the course catalog, see a detailed description of the items that are offered, use coupon codes and more. To enable E-commerce, go to Admin/App center and install E-commerce.

Payment gateway configuration

To configure the payment gateway, go to the Payment gateway tab. We currently have support for PayPal, PayPal Payment Pro, Authorize.net, Stripe, PayU LatAm, PayUbiz, PagSeguro, Flywire, and Purchase orders as payment gateways.

Choose one of them and link your existing account. More details on configuring each payment gateway can be found by visiting the Help Center under the E-commerce topic.

Setting prices for courses

To set a price for a course, go to the course configuration area and visit the E-commerce tab. Here you can add the price for the course and coupon codes.
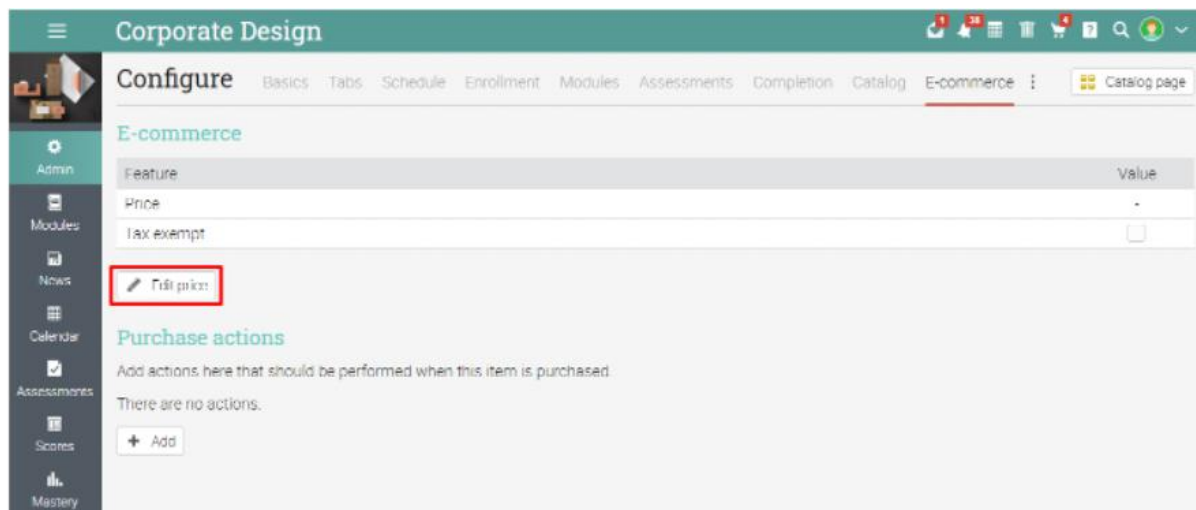

Bulk purchases

Users can also buy items in bulk. After finishing the checkout process, you can either enroll others using the seats you have purchased, or you can transfer seats to another account. Go to Admin/E-commerce/Configure and click Enable under Bulk purchases.
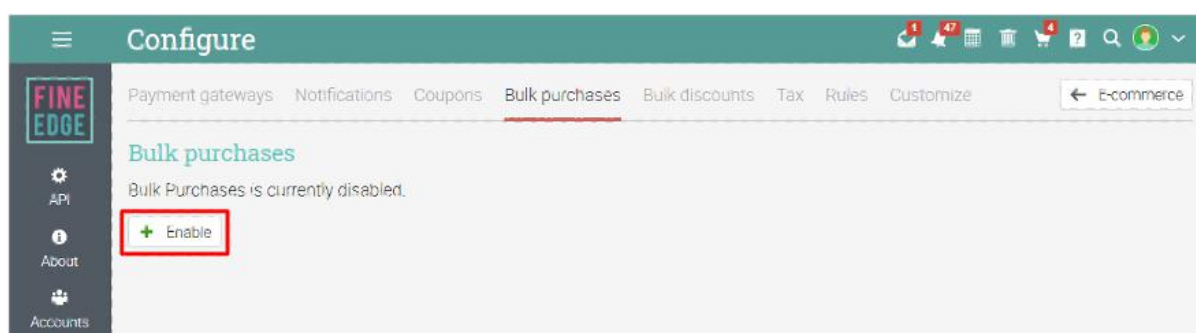
When bulk purchases are enabled, the shopping cart allows you to select a quantity and also whether the item(s) are for someone else. Note that if the items are for someone else, then the purchaser is not auto-enrolled into the course after the purchase.

Adding coupons

After the price is set, you can also add coupons for the course. To add a coupon, click Admin/Configure in the left bar, go to the E-commerce tab, and click on Add under Coupons.
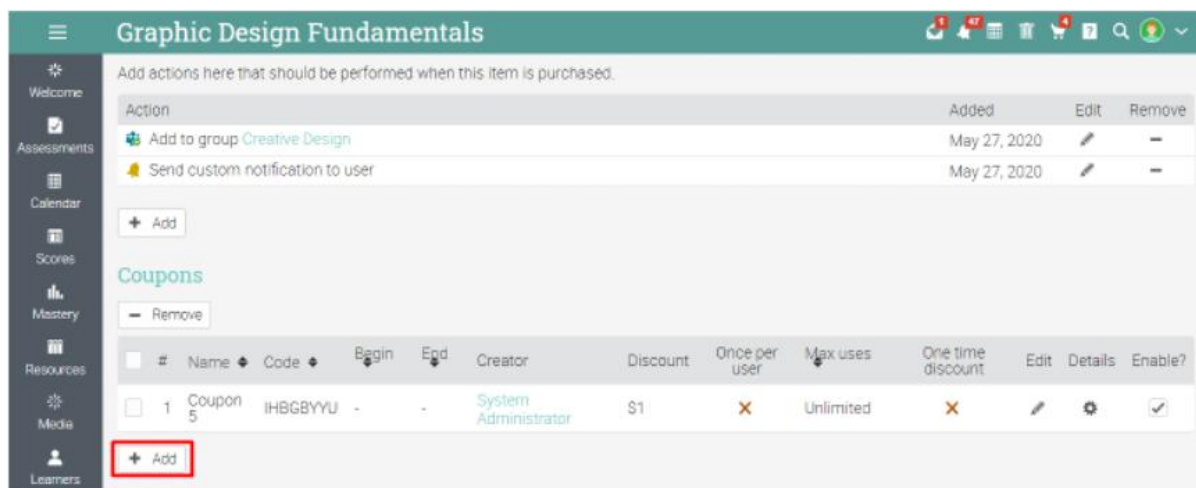
Then you will see different options for configuring the coupon, including name, a maximum amount of uses, the discounted amount (a fixed sum or a percentage) and the coupon code. Please note that if you want to enable the coupon for a limited time, you can select Enable time.

Add bulk discounts

This option allows you to add one or more bulk discount rules that apply to the entire shopping cart. To do this, click Admin/E-commerce/Configure/Bulk discounts, then click Add in the top right.

You can then set up a rule based on the number of items ordered or on the cost of the items. For example, if one visitor has at least 3 items in the shopping cart (quantity), they could receive a 10% discount. If the total value of the items is at least $40 (amount) they receive a 5% discount.

Add bundles

You can combine courses and digital media into a bundle and sell them as a package. To create a new bundle, go to Admin/E-commerce and visit Bundles under Items then click Add.
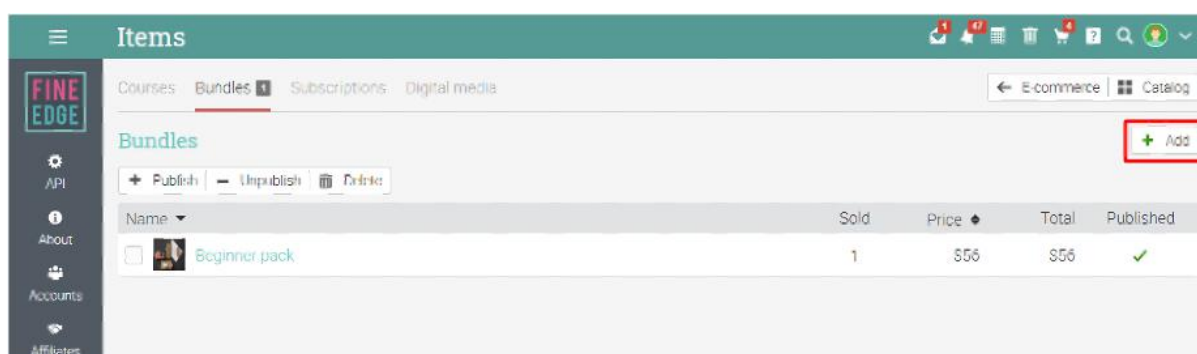
Choose a name for the bundle and then you are ready to add items.
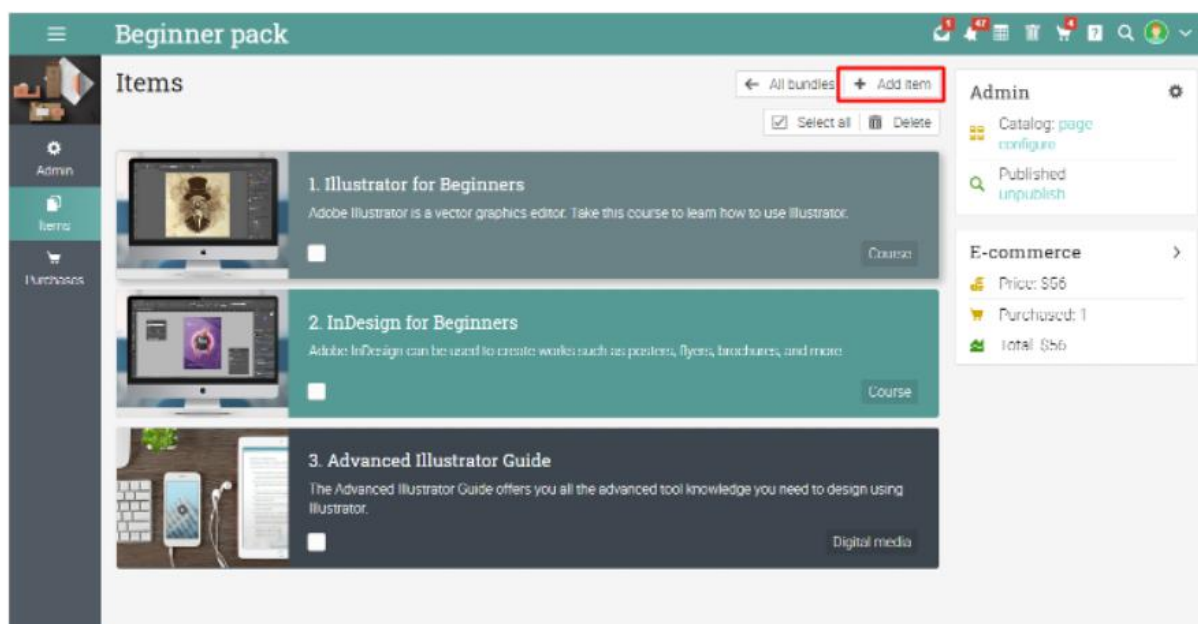
Select Admin/Configure to configure your bundle. Click on E-commerce to set a price and Coupons for the bundle. Please note that you must click on Publish under Admin (right bar) to publish the bundle to your catalog or click Publish under Admin/Configure.
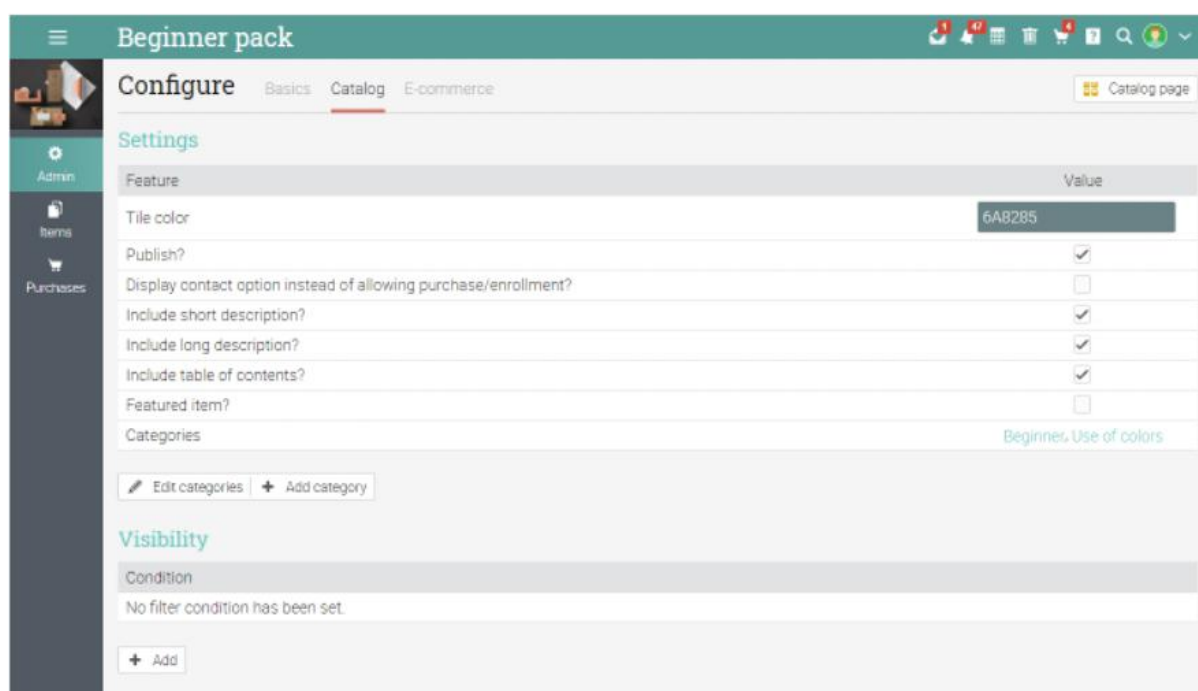
Adding subscription plans

You can create subscription plans consisting of courses and digital media that visitors can purchase for a monthly or yearly fee. To create a new subscription, go to Admin/E-commerce and visit the Subscriptions tab.
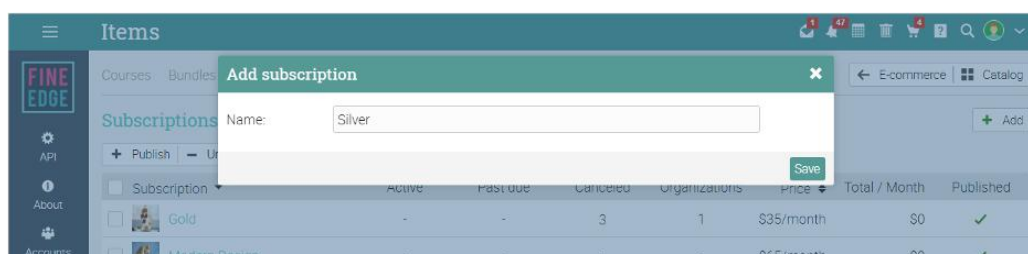
Digital media

You can also sell digital media items such as videos, audio files and pdf documents, just as you would sell courses. To add your files, visit the Digital Media tab under Admin/E-commerce.
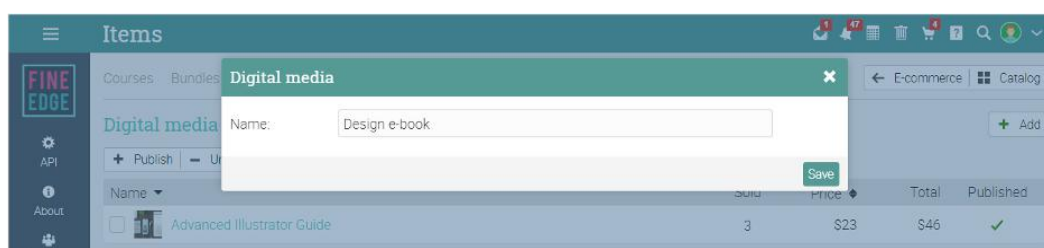
Shopping and checkout experience

Site visitors can browse your courses and other learning items by accessing the course catalog on your main portal. Users who already have an account can also purchase courses, digital media, bundles, or subscriptions through the course catalog.
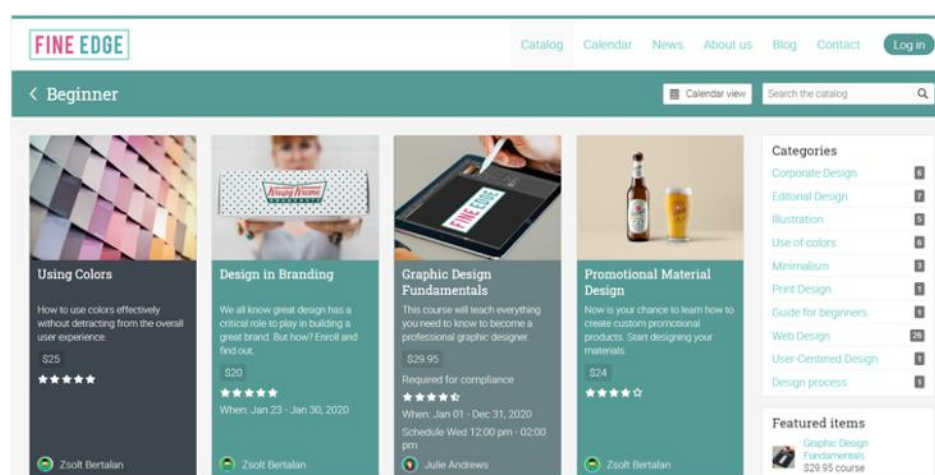
Purchasing items

The checkout process is the same for buying all learning items. Visitors can add it to their shopping cart by clicking on the Purchase button:

They will be directed to the Checkout page. If you set up a discount, your visitors will be able to apply the discount (see adding a coupon code section) when purchasing a course:
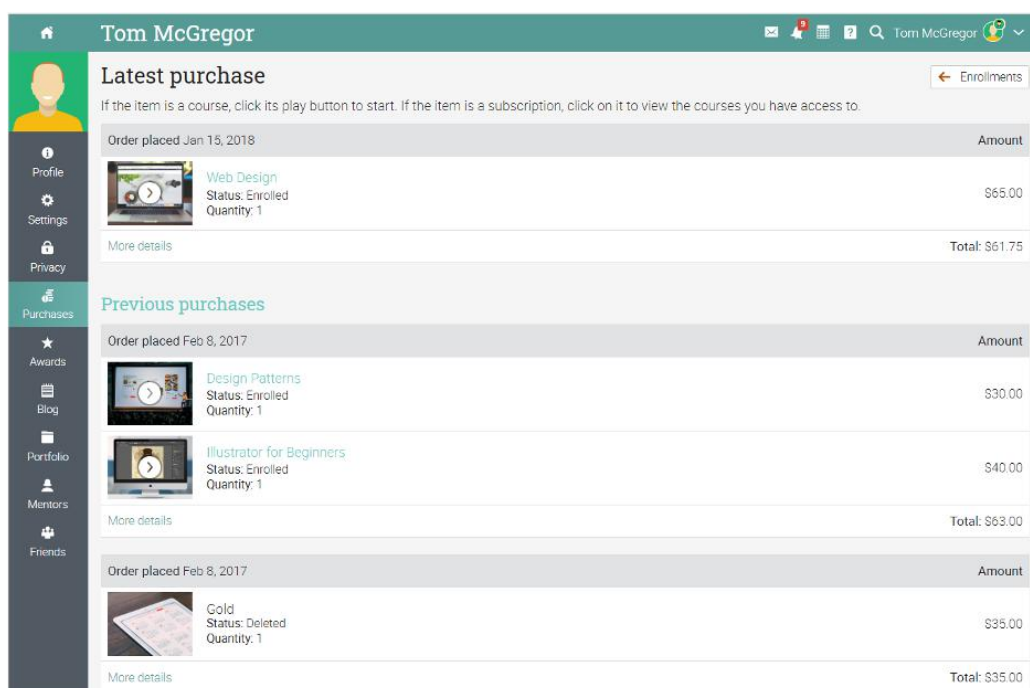
If visitors already have an account, they can click on Log in to proceed with the payment. If not, they will have to create a learner account by filling out the form under "Account".
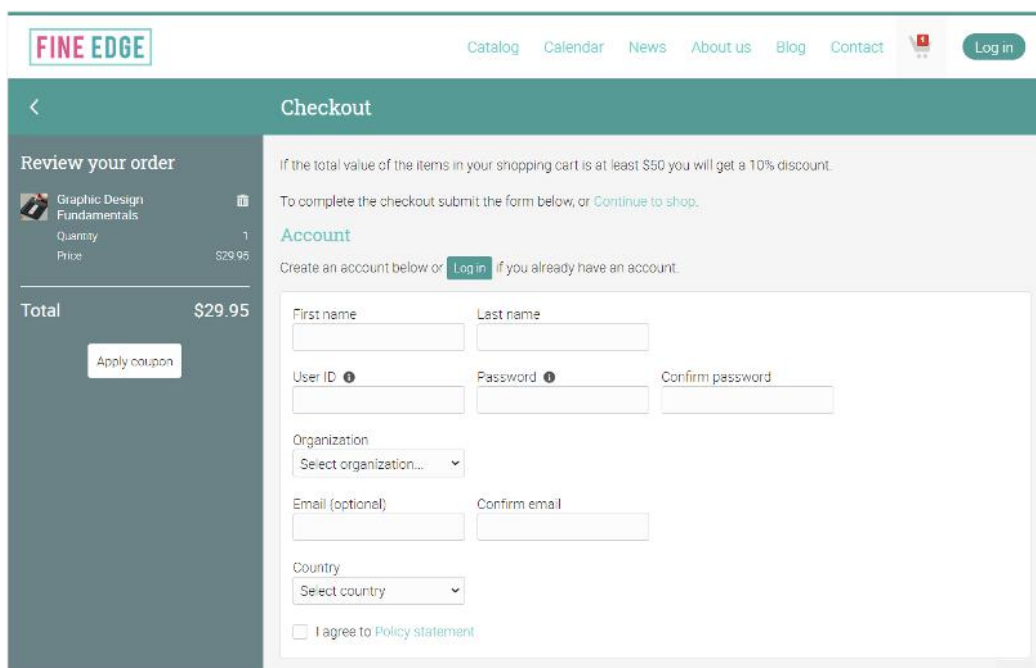
After the purchase, users can see the purchased items in the Purchases area of their profiles and they can enroll in the courses or access the items:

For a detailed report of the platform revenue, affiliates, and site statistics, visit the Reports area of your platform. More details can be found in the Help center under the Reports topic.

Using marketing tools

We provide various tools to help companies market their courses, such as SEO features, affiliate marketing, integration with Mailchimp, and more. Currently, administrators can configure SEO for the portal, set up an Affiliates program and use Mailchimp. You can also promote courses by encouraging learners to rate and review training items.

Configuring SEO for the portal

Go to Admin/Portal and select the SEO tab. You can choose if you want the site to be indexed and shown in search engines, set up a meta-description, and keywords.
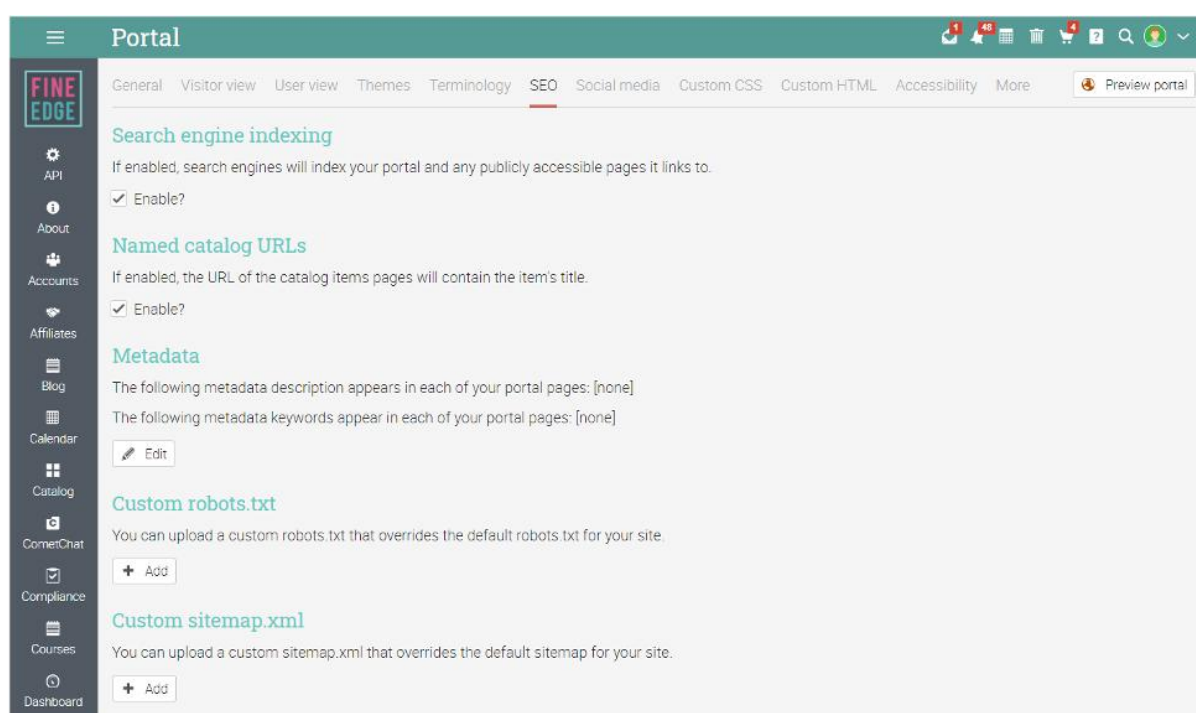
Configuring SEO for courses

You can also update the meta description and keywords for each individual course. Go to the Course page, click Admin/Configure and go to the Catalog tab. Select Add under SEO.

Add a meta description, relevant keywords and Save.

Affiliate programs

You can set up an affiliate program for the portal by creating affiliate accounts. An affiliate is a person that can advertise your training items on their own platforms such as blogs and social media. Affiliates can get a commission on referral. This feature must be first installed via the App center.

Each Affiliate user has its own affiliate link which they can use to bring visitors to the portal. For each converted visitor, the Affiliate will get a commission which is defined by you as a percentage of the purchase value.

Mailchimp integration

Mailchimp is an email marketing tool that allows you to design and send marketing emails. You can import Mailchimp contacts into the portal and export user lists from your portal to Mailchimp.

Ratings and reviews

You can allow learners to rate and review courses they are enrolled in.
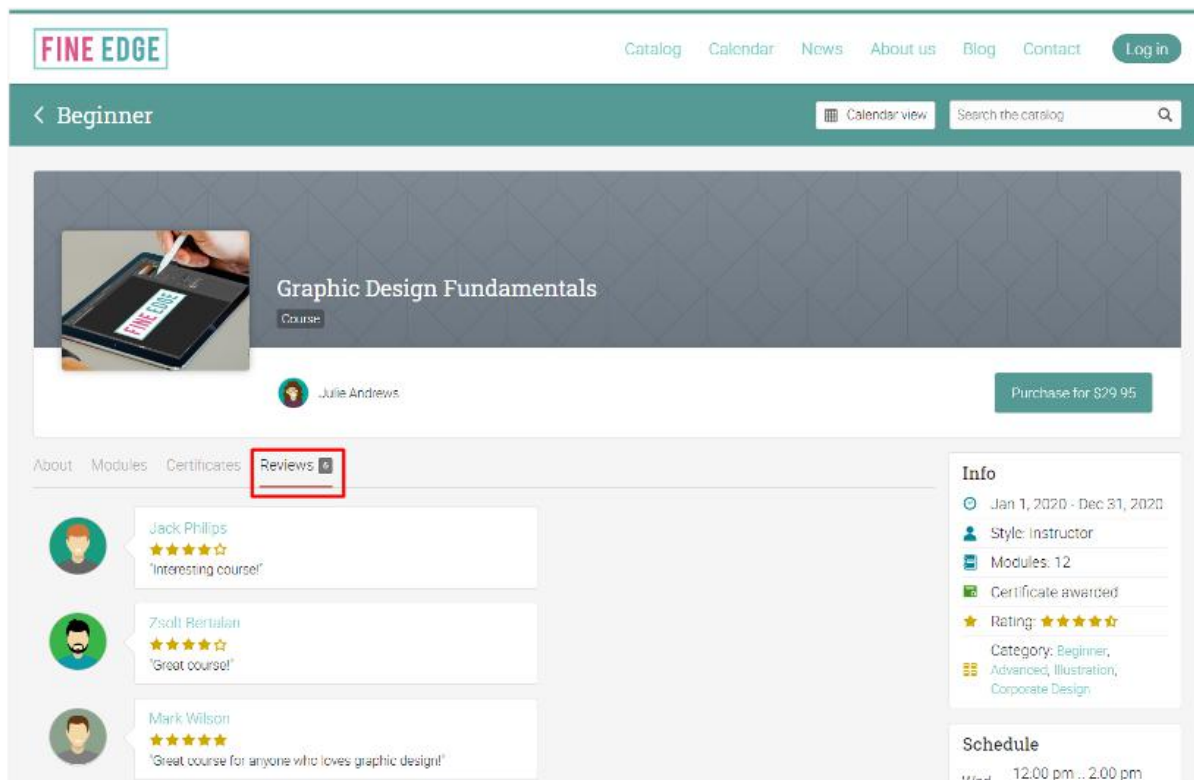
You can choose to accept or dismiss reviews. When a learner submits a rating/review, you will receive a notification of the submission. To moderate the rating, click on the link in the notification or go to the course's Reviews tab in the left bar. If you want to publish the rating, click the publish checkbox.
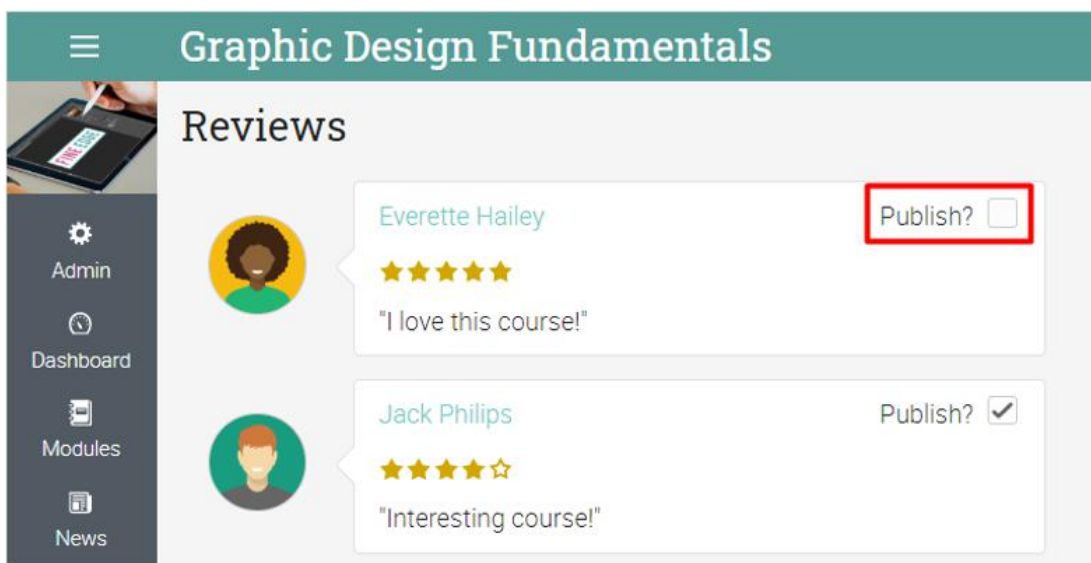
Configuring compliance

Compliance is a useful feature for companies that offer compliance training for their employees. You can select the courses that are required for compliance, then set up for how long the learner is in compliance once they've completed them. You can also set up periodical renewal of compliance.

First, Compliance must be installed via the App center. Then visit the Admin/Configure area of a course and find the Compliance tab. Click the 'Require for compliance' button to make the course required for compliance:
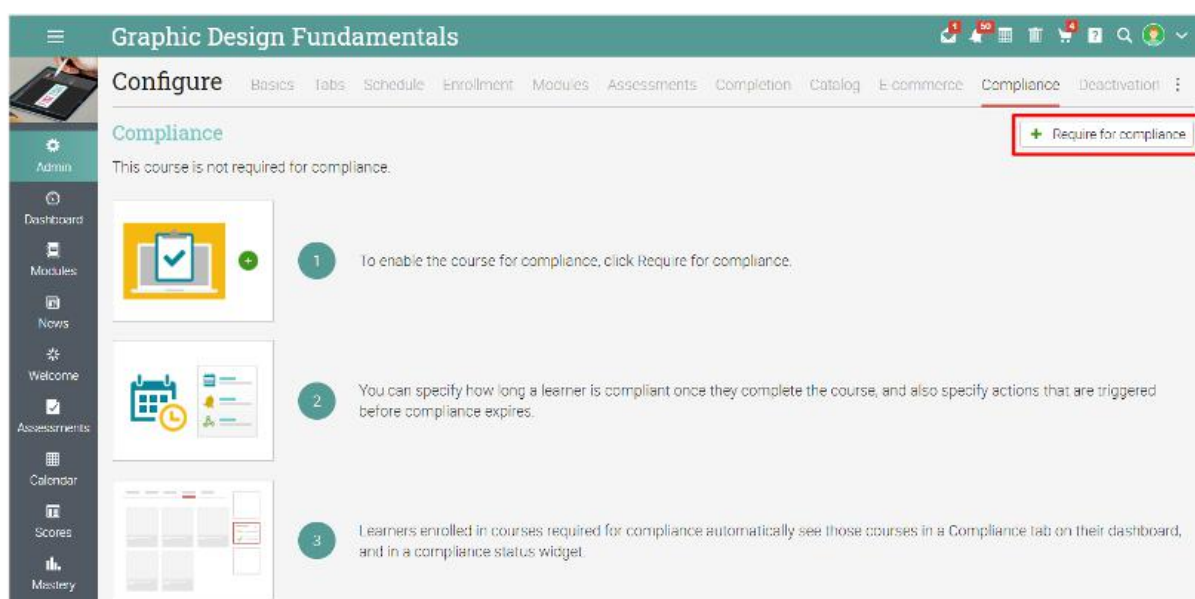
After enabling this option, when a learner completes the course, they are deemed compliant for a specified period of time. By default, the period is "forever". To change it, click on Edit. The following options are available: Forever, Specific duration, Until a specific date, and For date period. For example, if you want compliance to be available for 3 months choose a specific duration:

You can then add rules that specify what happens before compliance expires. For example, you might choose to start the countdown 30 days before expiration and choose to reenroll learners in the course:
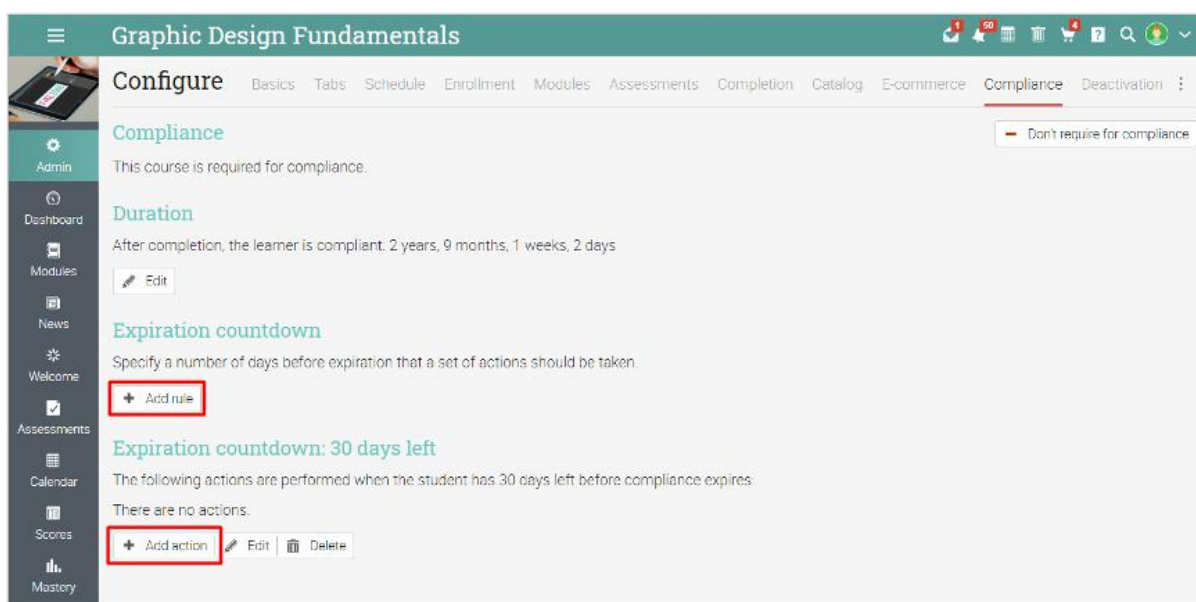
To see all the courses required for compliance, go to Courses/List and visit the Compliance tab from the top bar. Here you can see the number of learners who are compliant, in progress or non-compliant. If you click on any of the numbers, you will be redirected to the Learner/Compliance section of the course.
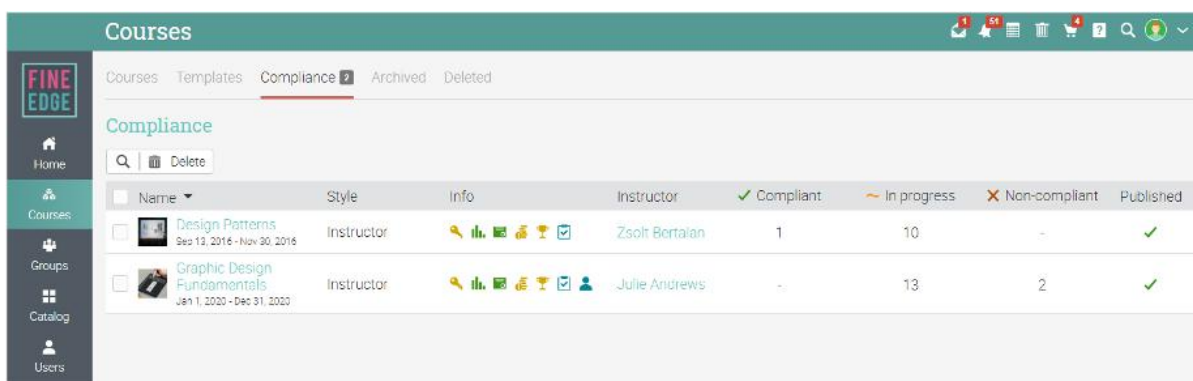
Setting up canned messages

Many actions that users take in the platform such as enrollment, unenrollment and deactivation have associated messages that are sent to them. The content of these messages can be customized by going to Admin/Messages.

To change the canned message associated with an action, click on its Edit option, then enter the new subject and content.
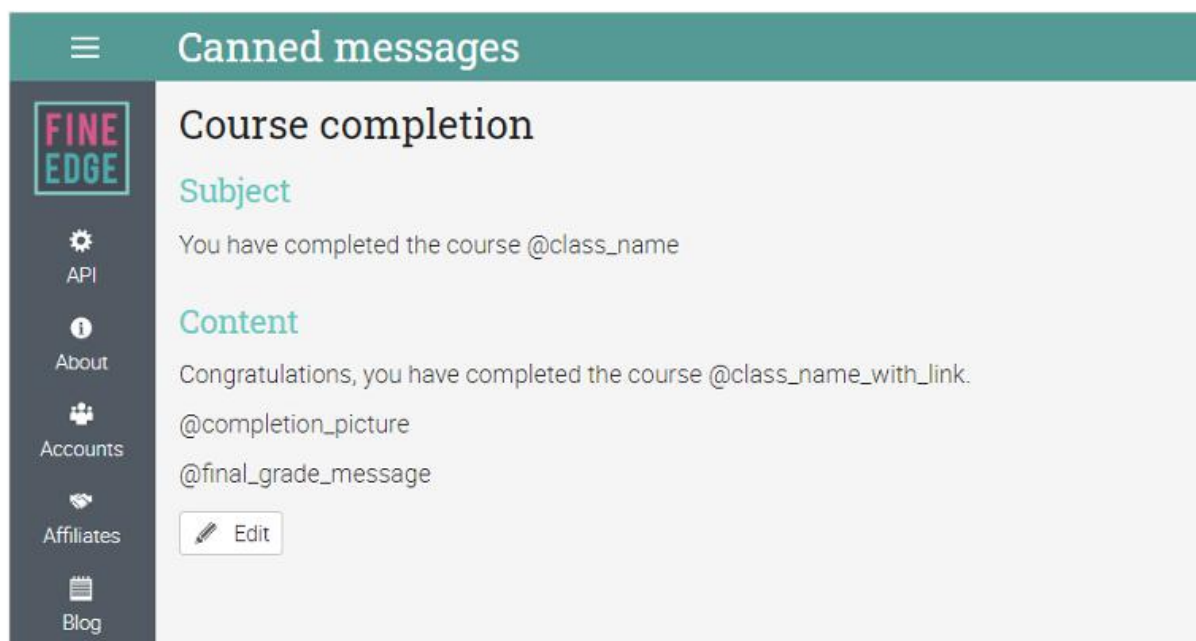

Each action has variables associated with it that can be inserted into the canned message using the "@" syntax.
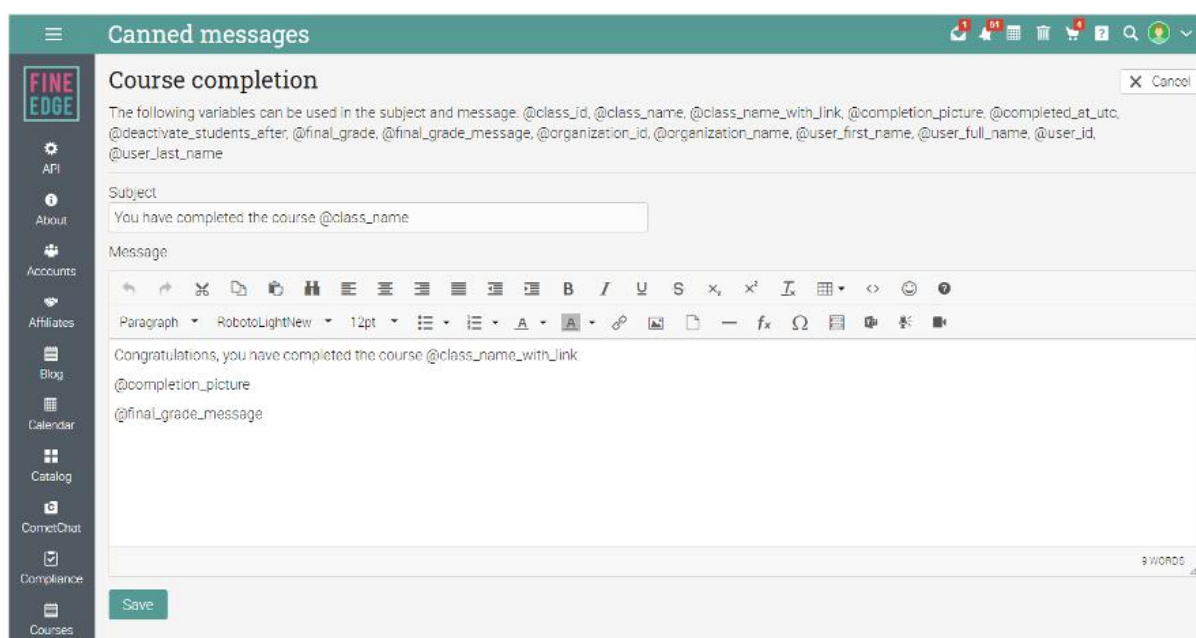
Creating reports

You can create reports about many aspects of the platform such as system statistics, course completion and course enrollments. CYPHER also provides custom reports, which you can configure yourself.

Please note that this feature must be installed first via the App Center. Then go to the Reports menu in the left bar and click Catalog.
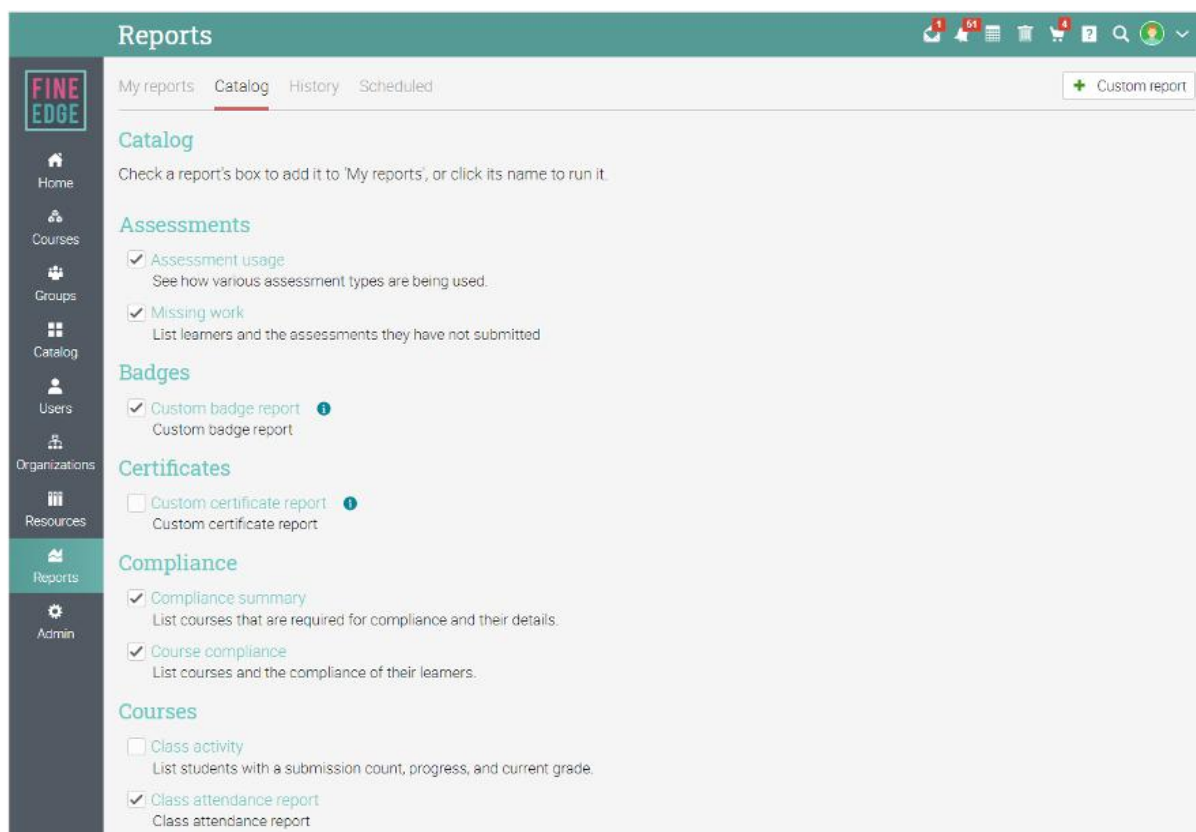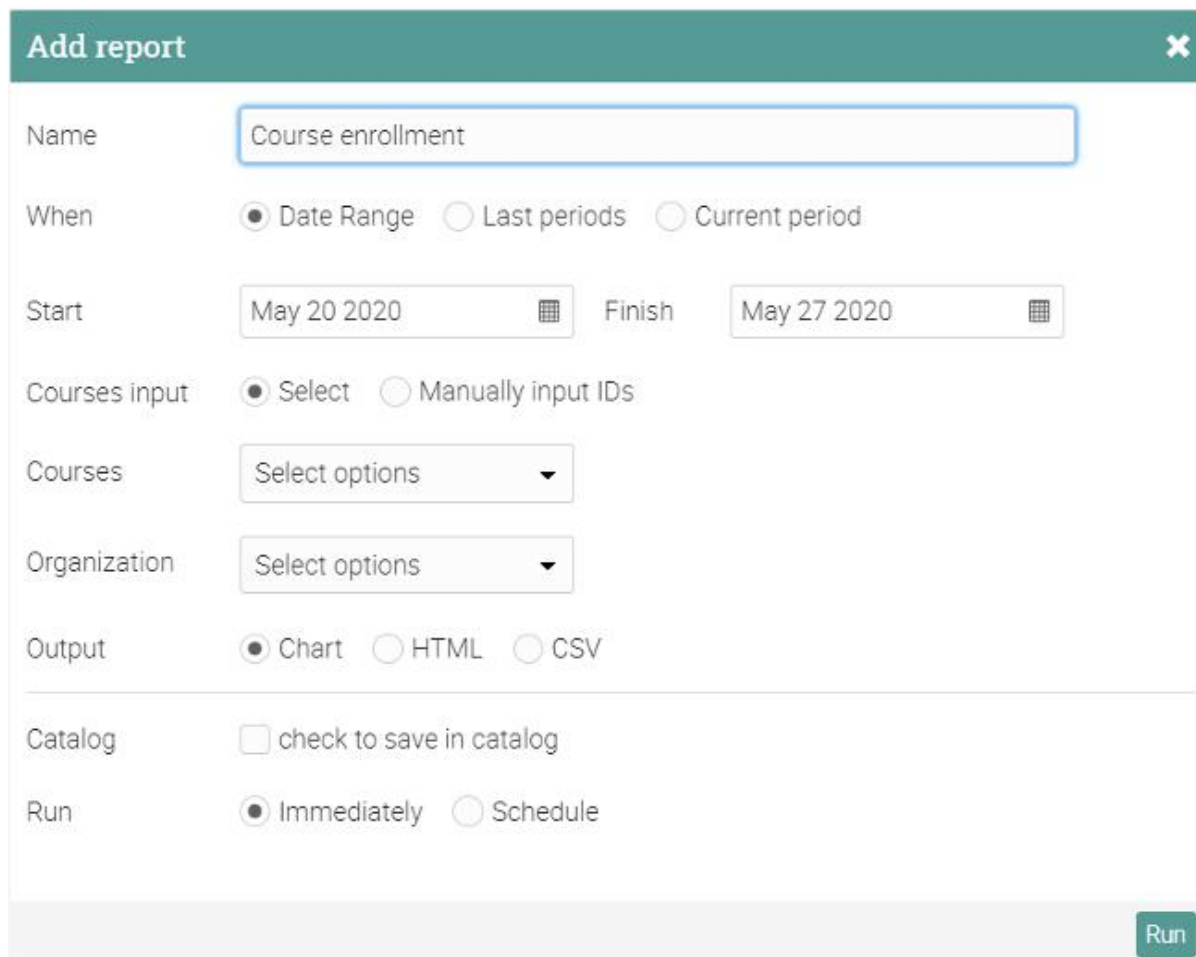

Here are some reports to get you started:

Site statistics

In this report you will see statistics about the number of users, courses, enrollments, assessments, storage, and more. To generate the report, enter a name and click Run. When the report is generated you will get a notification. In the notification you will have a link to the details of the report.

Course enrollment

In the Course enrollments report you can see the enrollments for a course within a timeframe of your choice.

Course status

In the Course status report, you can see the enrollment status of the learners of a particular course and the number of assessments that they have to do.

Course completion

In the Course completion report you can see the number of completions for a course in the period that you choose. When you want to generate the report, enter the name of the report, and choose the courses and the organization, then select the output format and click Run.

Revenue

In the Revenue report, you will see statistics for the revenue generated through e-commerce. To generate the report, enter the name of the report, the analyzed time period and the output format, then click Run.

Compliance summary

The Compliance summary report lists the courses that are required for compliance and their details.

Saved and scheduled reports

Under the Scheduled tab, you will see all scheduled reports. When you add a new report, you have the option to run it immediately or schedule it. You can define the time when the report will be executed and if you want it to be generated repeatedly.

Custom reports

Custom reports allow you to select the data that you want to report on such as users, courses, paths, organizations, and more. To add a custom report, click on Custom Report in the top right.

Select from a variety of fields, use filtering options, sort, and group data by different parameters, and choose the chart output:
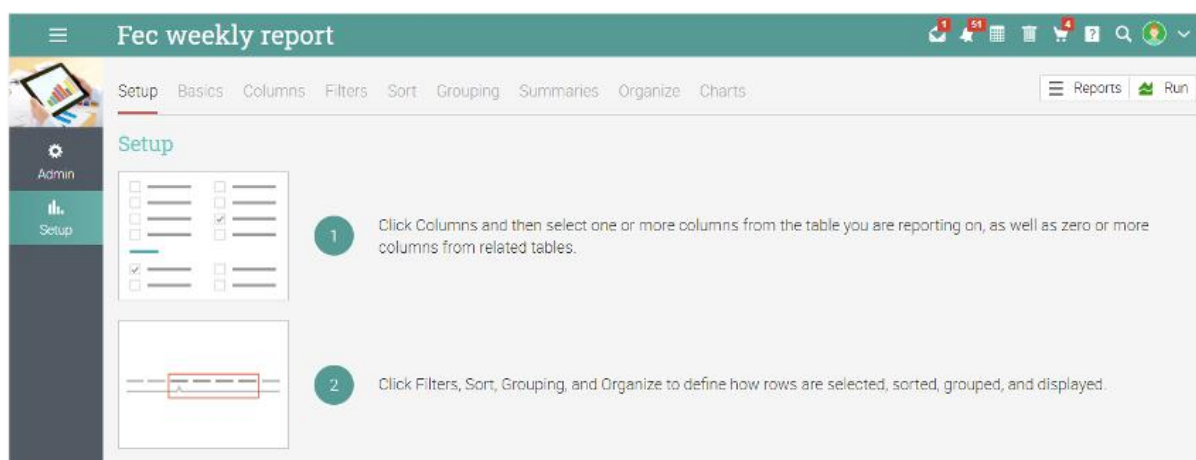
In the Columns tab, you can select which columns you want to report on, including your own custom account fields.
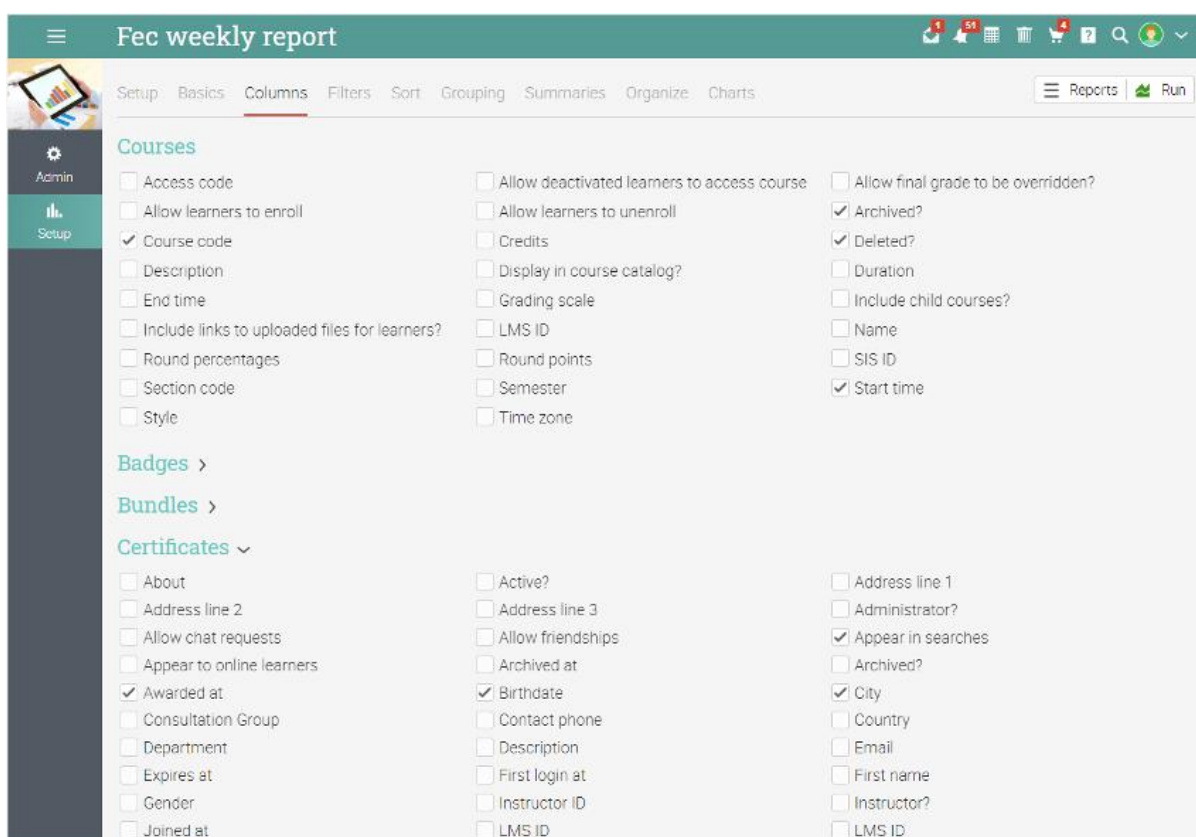
Summary

The Getting started guide for Administrators provided the basic information that administrators need when they first start using CYPHER. The topics we covered were: navigating in CYPHER, using the Help Center, customizing the company portal, creating accounts, setting up policies, configuring the course catalog, setting up e-commerce, using automation and compliance, and more.

If you have any additional questions, please browse the Help Center or visit our support forum.

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www.cypherlearning.com

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