

Qlik Learning Admin Guide

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This document is intended for Qlik Learning Subscription Administrators.

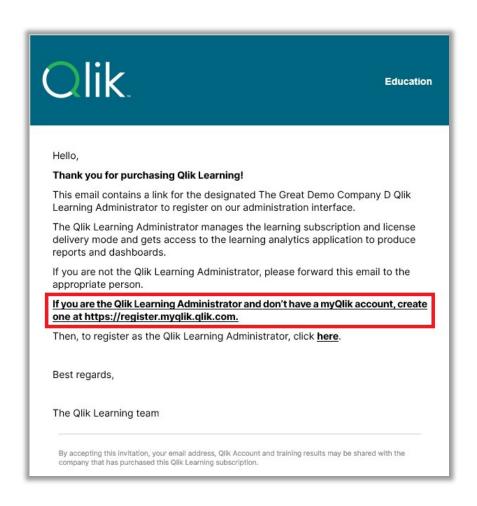


Managing your new Qlik Learning Subscription

When you register, you will have Subscription Administrator permission to manage your Qlik Learning subscription in the Learning Admin Portal.

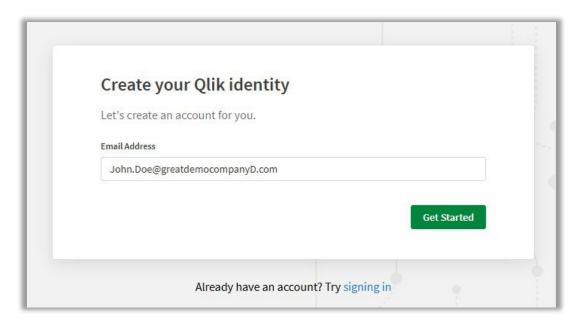
Accepting your Subscription Administrator access

1. Open the email sent from <u>trainingadministration@qlik.com</u> and click the first link.

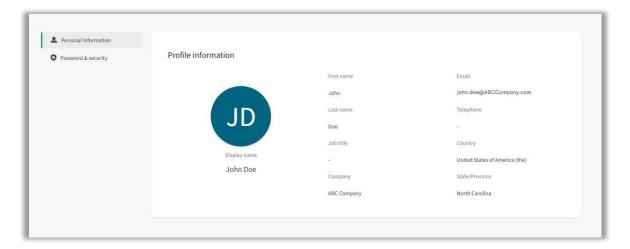




2. You will be prompted to create your Qlik identity. Start by adding your email address and clicking the Get Started button. Follow the remaining prompts to complete the creation of your Qlik identity. If you already have a Qlik Account, you need to login with your user information.

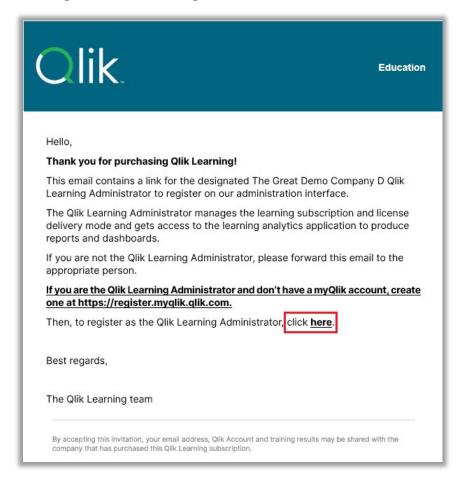


3. After you have successfully created your Qlik identity, you will see your profile information.





4. Next, you need to register as your company's Qlik Learning Administrator. Locate your Qlik Learning Administrator registration email and click the second link.



5. Review the information to ensure it is correct, select the Identity Confirmation check box, and click the Submit button.



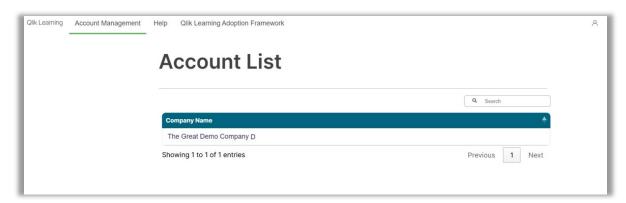


Managing Your Qlik Learning License

Accessing Qlik Learning Using Company Email Domains

NOTE: Partners will use the email domain option only for accessing their licenses.

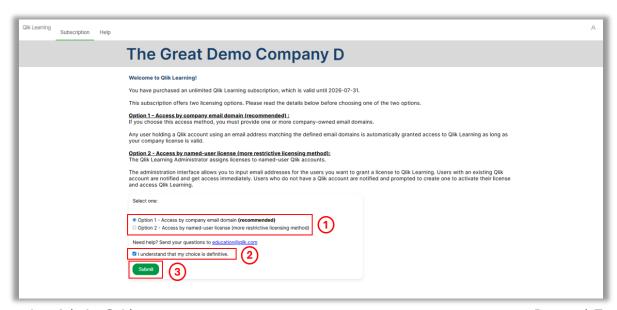
 After you accept/activate your Qlik admin access, you will be taken to the Account List screen. Click your company's name.



2. When you click your company's name, you will be presented with a screen to choose your licensing options. The administration interface allows you to input email addresses for the users you want to grant a license to Qlik Learning. Users with an existing Qlik account are notified and get access immediately. Users who do not have a Qlik account are notified and prompted to create one to activate their license and access Qlik Learning.

Complete the following:

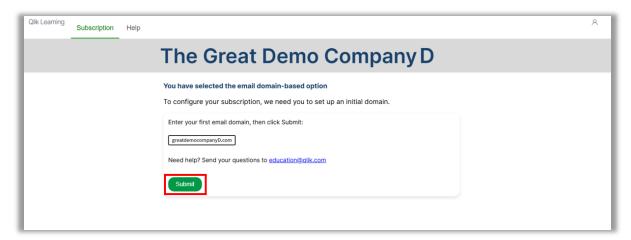
- 1. Select Option 1.
- 2. Check the box that you understand your choice. NOTE: This choice is definitive, and CAN NOT be changed once submitted.
- 3. Click the Submit button.





3. Next, add your company email domain name (everything after the @ symbol) and click the Submit button.

NOTE: You will also want to add all variations of your email domain if you have more than one (ex: greatdemocompanyD.com and greatdemocompanyD.ca, etc.).



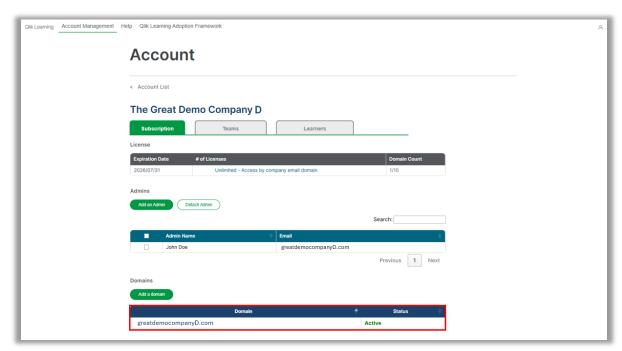
4. You will receive notification that the Status is Pending Domain Creation.





5. Once it is approved, the Status becomes Active.

NOTE: Please allow at least 24 hours for approval.

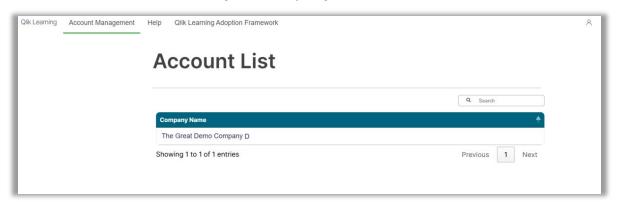


NOTE: The Learners tab is where administrators can view who has logged in with their email domain.



Accessing Qlik Learning Using a Named User License

 After you accept/activate your Qlik admin access, you will be taken to the Account List screen. Click your company's name.

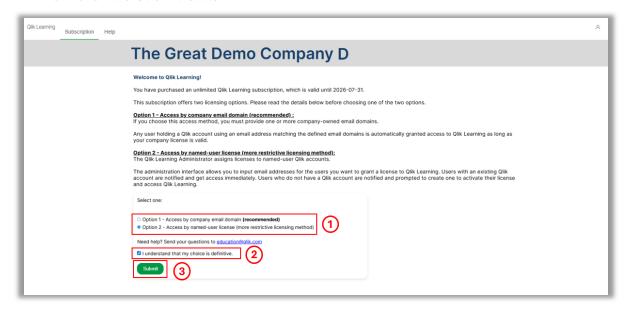


2. When you click your company's name, you will be presented with a screen to choose your licensing options. The administration interface allows you to input email addresses for the users you want to grant a license to Qlik Learning. Users with an existing Qlik account are notified and get access immediately. Users who do not have a Qlik account are notified and prompted to create one to activate their license and access Qlik Learning.

Complete the following:

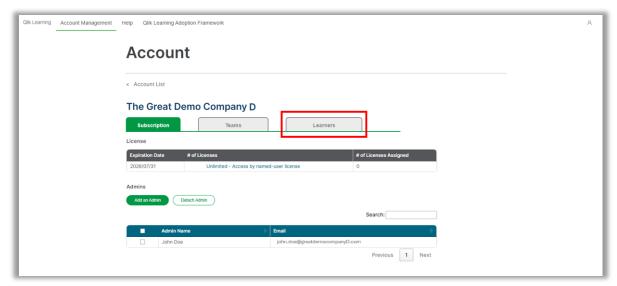
- 1. Select Option 2.
- 2. Check the box that you understand your choice.

 NOTE: This choice is definitive, and CAN NOT be changed once submitted.
- 3. Click the Submit button.

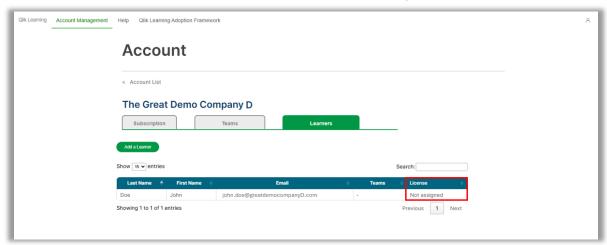




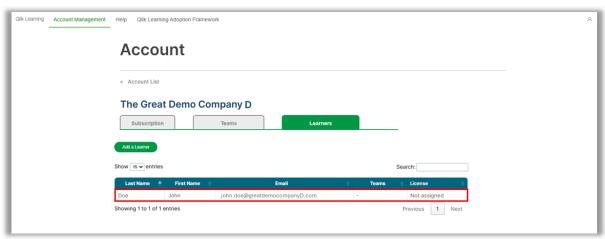
3. Click on the Learners tab on the next screen.



4. Here you will see that a license has not yet been assigned.

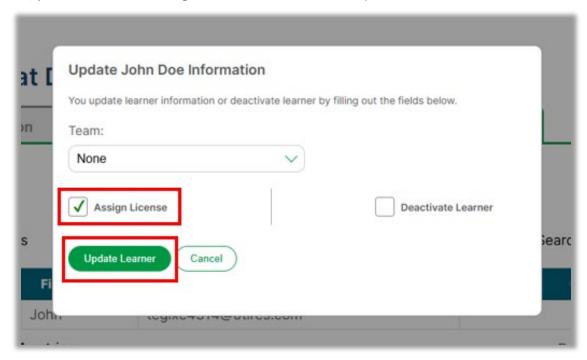


5. To add a license to the learner, you may click on either the learners first or last name, email address, or the Not Assigned wording.

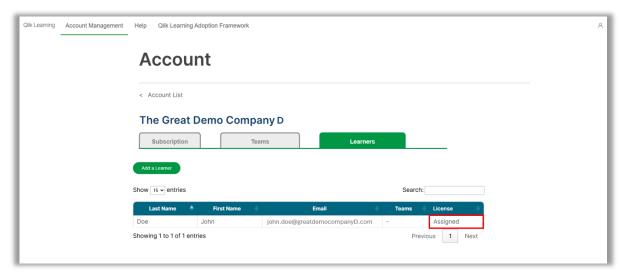




6. Next, you will click on Assign License and then the Update Learner button.

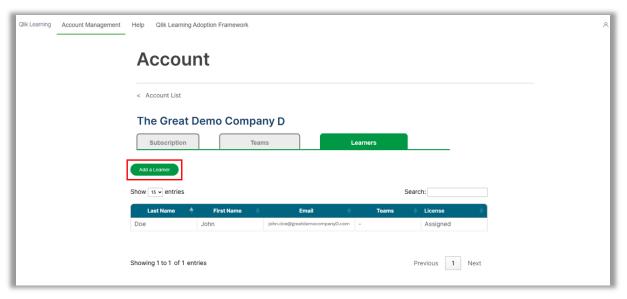


7. The license status has now been updated to Assigned.

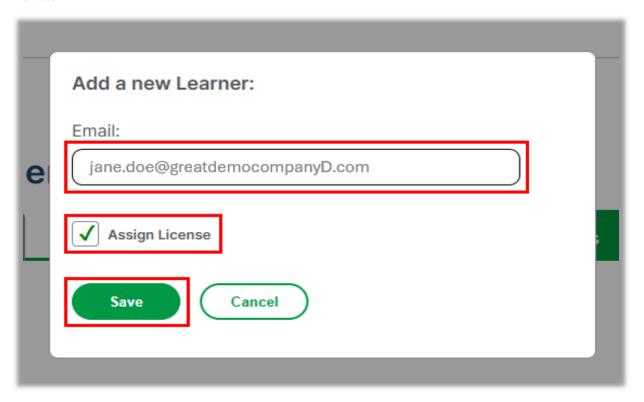




8. To add additional learners who need an assigned license, click the Add a Learner button.

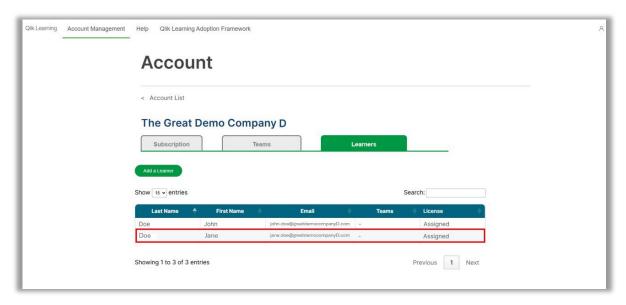


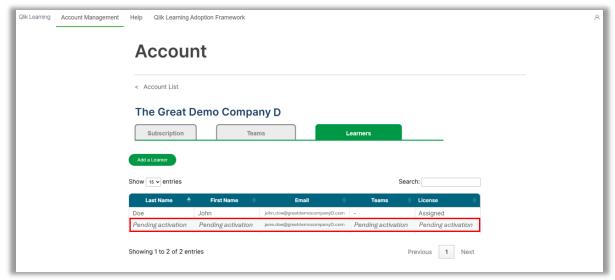
9. Enter the email address of the learner, click on Assign License and then the Save button.





10. If the added learner has already created their Qlik Identity, they will show as accepted. However, if they have not, they will show as Pending activation, and an email will be sent to them to accept.

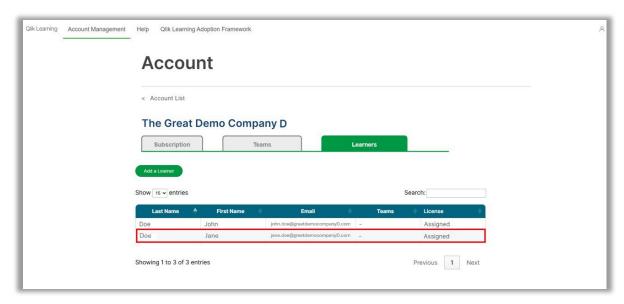






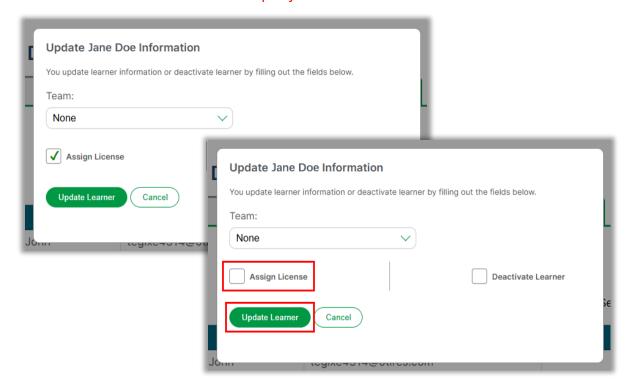
Removing Assigned Licenses for Named User Licenses Only

1. You can remove a learner's subscription after the user accepts the invitation. Locate the learners name under the Learners tab and click on their name.



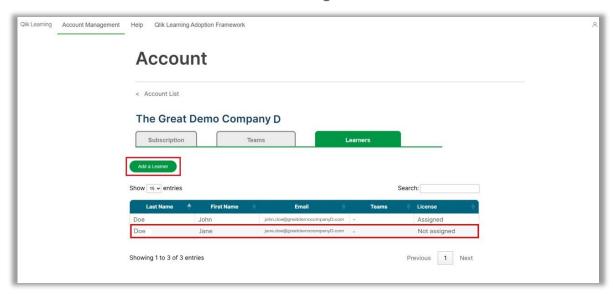
2. On the next screen uncheck the Assign License box and click on the Update Learner button.

NOTE: The only time you would want to check the Deactivate Learner box would be if the user has left the company.





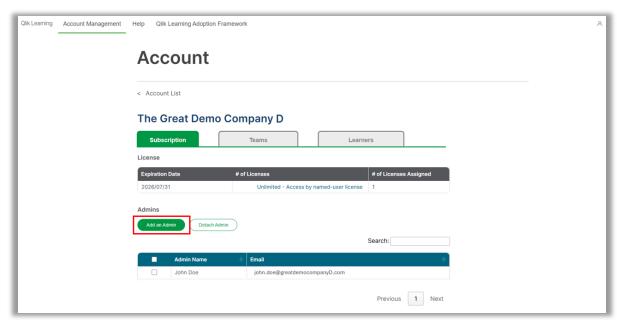
3. The license should now show as Not assigned.



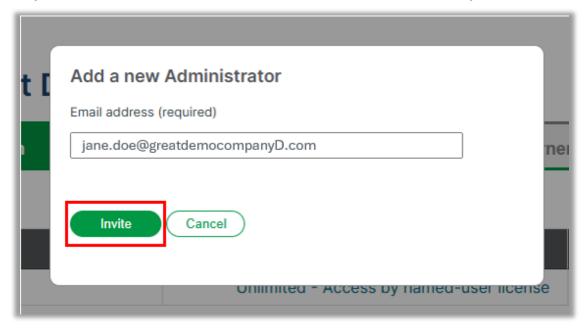


Inviting or Removing an Administrator

1. In the Subscription tab, click on the Add an Admin button.

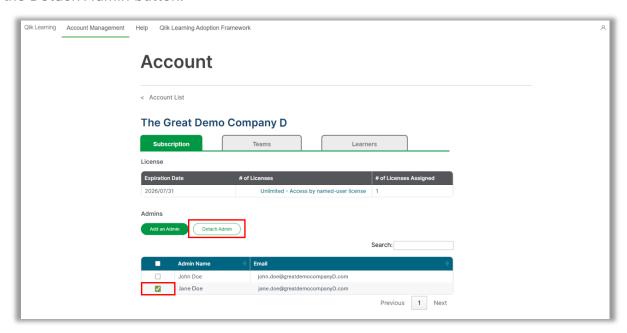


2. Enter the email address of the admin you want to add and click on the Invite button. They will be sent an email with instructions on how to access the system.

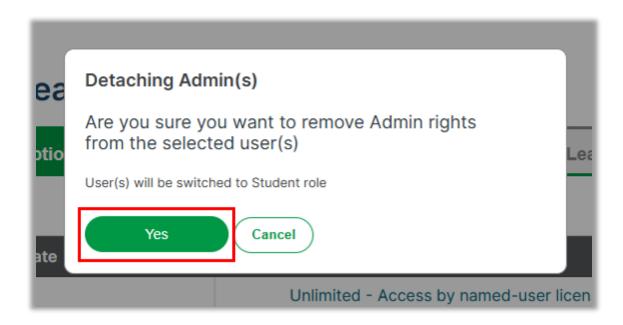




3. To remove an admin, select the name of the admin you want to remove and then click on the Detach Admin button.



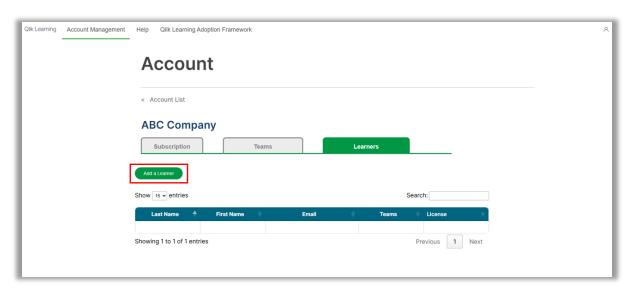
4. On the next screen, click on the Yes button to confirm removal of the admin. They will then be removed from the list of active admins.





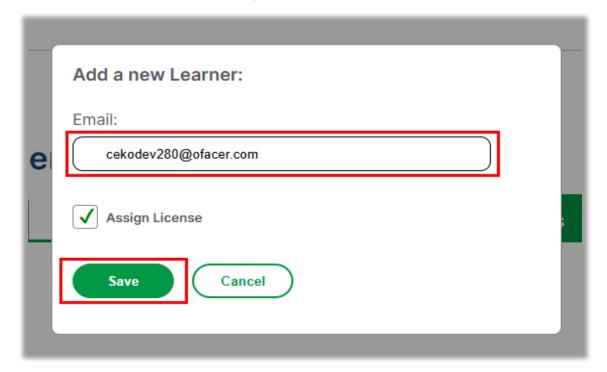
Adding Team Members

1. In the Learners tab, click on the Add a Learner button.



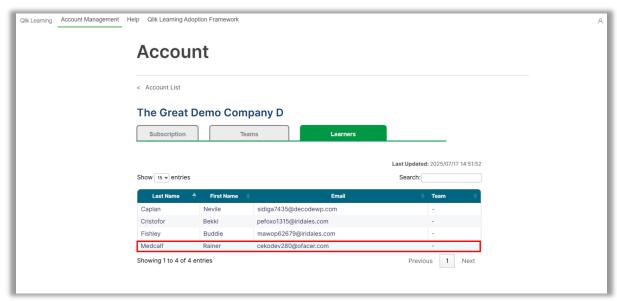
2. Next, enter the email address of the learner and click the Save button.

NOTE: Please ensure the Assign License checkbox has a checkmark in it.

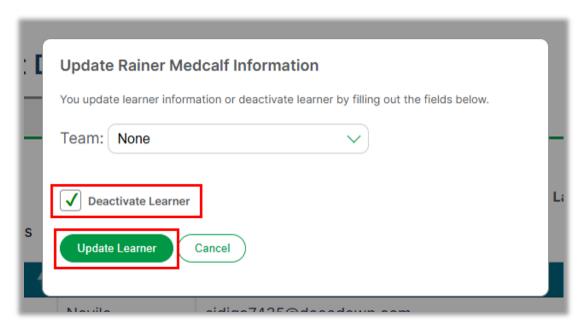




3. The new learner will now appear on the list.

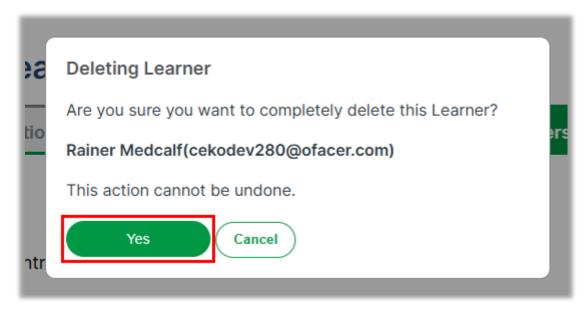


4. To remove a learner, select the name to be removed and click on it. On the next screen check the Deactivate Learner checkbox and click on the Update Learner button.

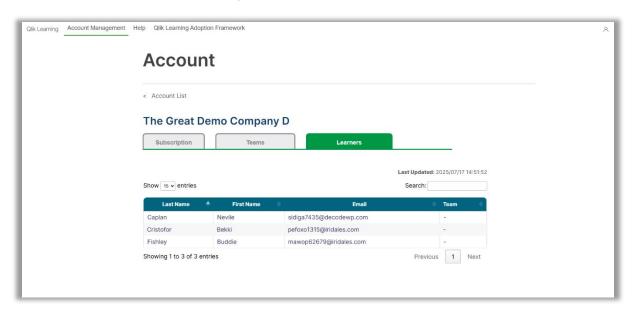




5. Click on the Yes button to confirm the removal.



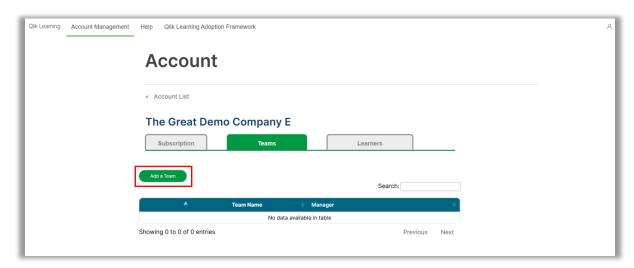
6. The learners' name will no longer appear on the list.



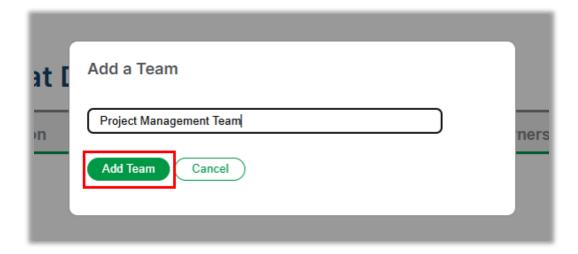


Creating a Team List

1. Click on the Teams tab on the Account Management page, then click on the Add a Team button.

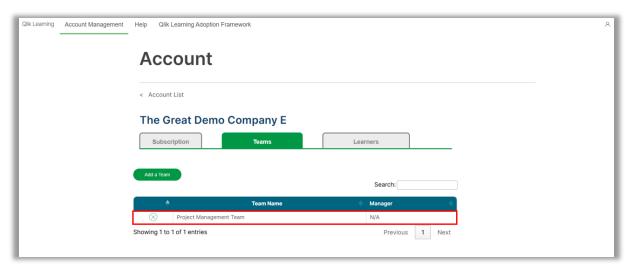


2. On the next screen enter the name of the team you want to create and then click on the Add Team button.





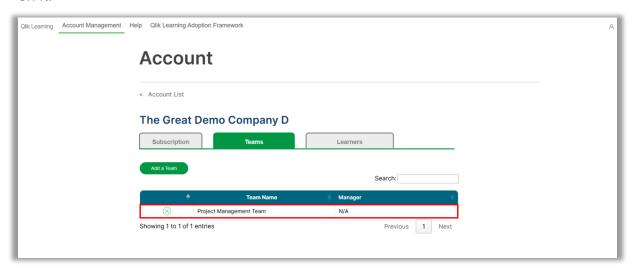
3. The new team will be added to your list.



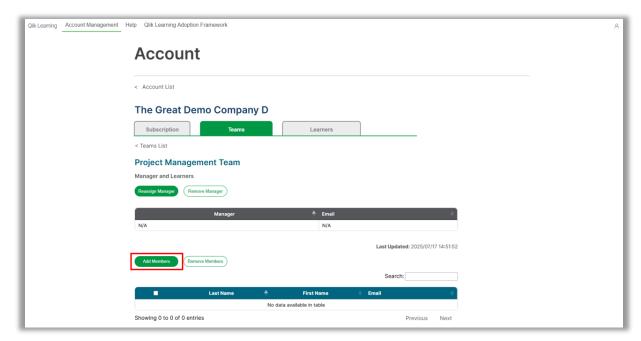


Assigning Learners to a Team

1. In the Teams tab, locate the name of the team you need to assign learners to and click on it.

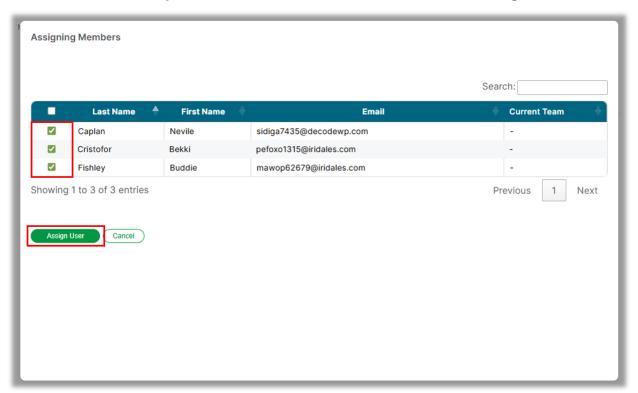


2. On the next screen, click on the Add Members button.

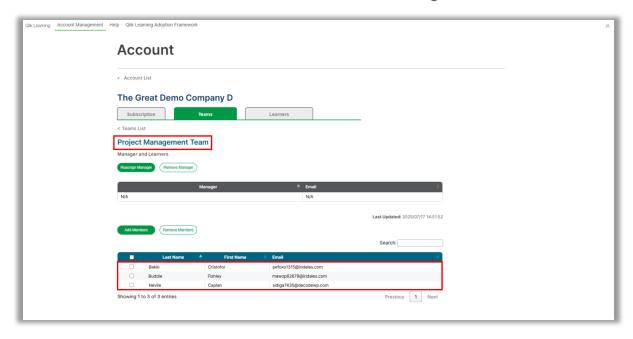




3. Select the learners you want to add to the team and click on the Assign User button.



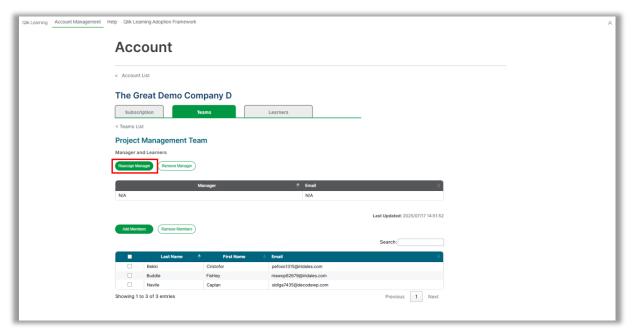
4. The selected learners will now show in the list for the assigned team.



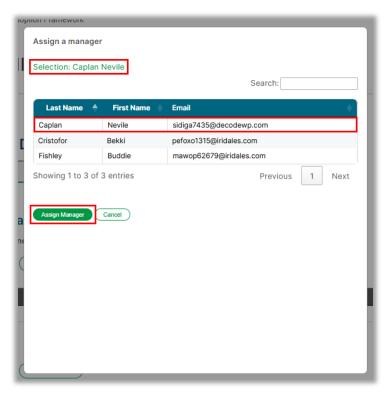


Assigning or Removing a Manager

7. In the Teams tab, locate and click on the Reassign Manger button.

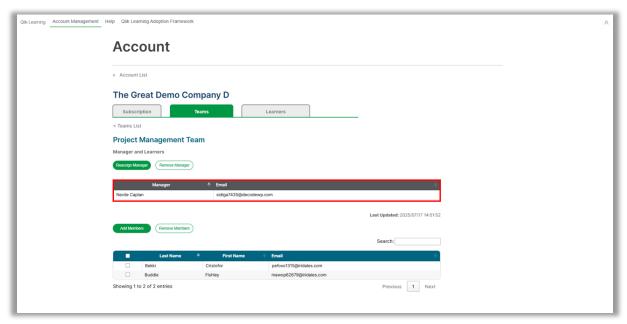


8. On the next screen, locate and click on the name of the manager you want to add to the team from the list provided. Double check that the selected name also shows in the top left-hand corner next to the word selection before you click the Assign Manager button.





9. The manager's name will now appear on the list.

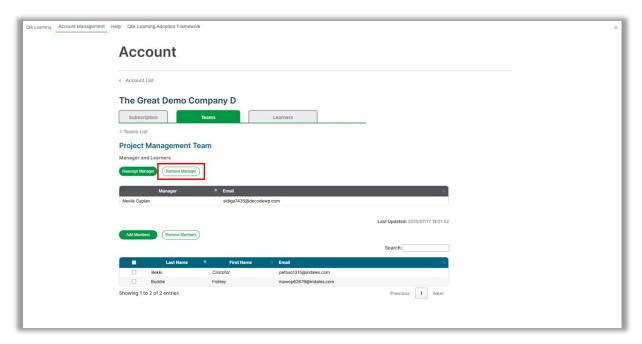


10. Once a manager has been assigned, they will then see the Manage button in the top navigation and will be able to enroll learners into required or recommended training.

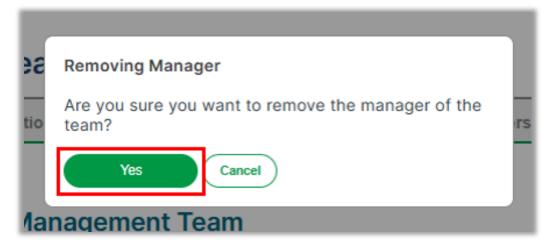




11. To remove the manager, click on the Remove Manager button.

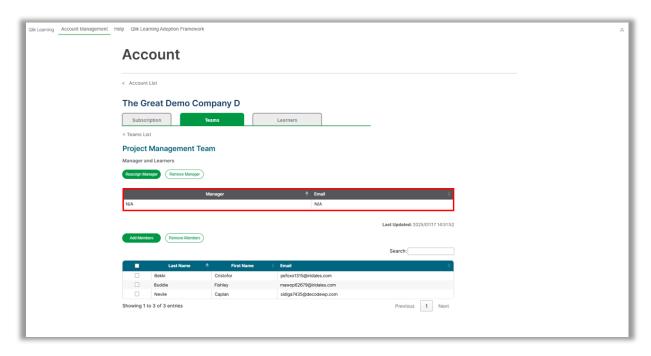


12. Click on the Yes button to confirm removal.





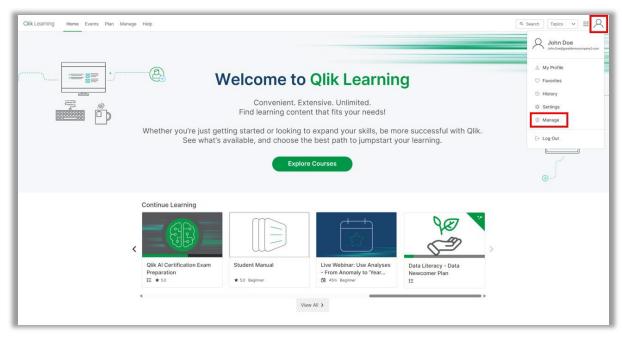
13. The new manager's name will now be removed from the team.



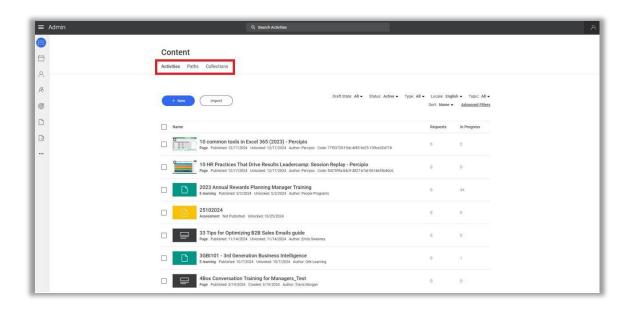


Enrolling Learners in Training

1. Log in into your admin account, click the Profile button at the top right of your dashboard, and click the Manage link in the drop-down.

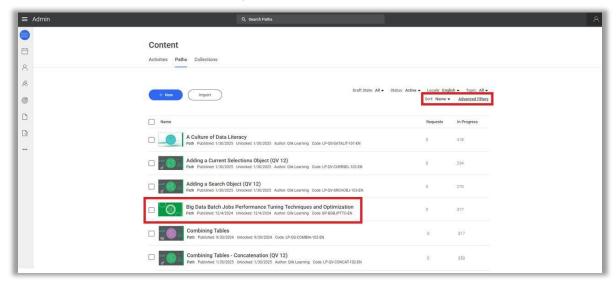


2. You will then be directed to the content page. Here you can choose different types of content, such as Activities, Paths, and Collections.

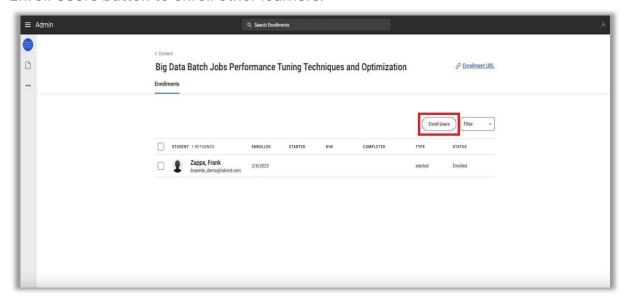




3. Next, click the Paths tab. Here you can browse all the learning content available. You can adjust the filters and sort options to narrow your search. Once you have found the content you are looking for, click the title.

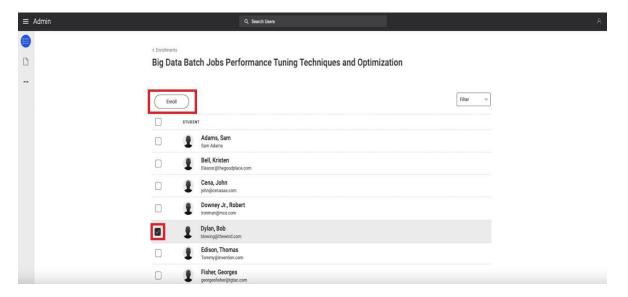


4. On the next page, you will see the learners already enrolled in this path. Click the Enroll Users button to enroll other learners.





5. Here you will see all the available learners in your organization. Select the user you would like to enroll by clicking the box next to their name and click the Enroll button.



- 6. On this screen, you will be able to:
 - 1. Assign a due date for the training.
 - 2. Make the training either Recommended or Required.
 - 3. Provide a reason why they need to complete this training.

Once you have completed filling out the information, click the Save button to finalize the enrollment.





Notes

- 1. Invitation links are unique to the user and can only be accepted once. Therefore, only the intended recipient should click on the invite link. If another user clicks on this link, the invite will then be associated with that user's account.
- 2. A Qlik Identity and password is required to access the Qlik Learning Admin Portal.

For questions, please contact Education@qlik.com

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