How does Back Office work?

Ester Andersson - 2024-03-27 - Functions

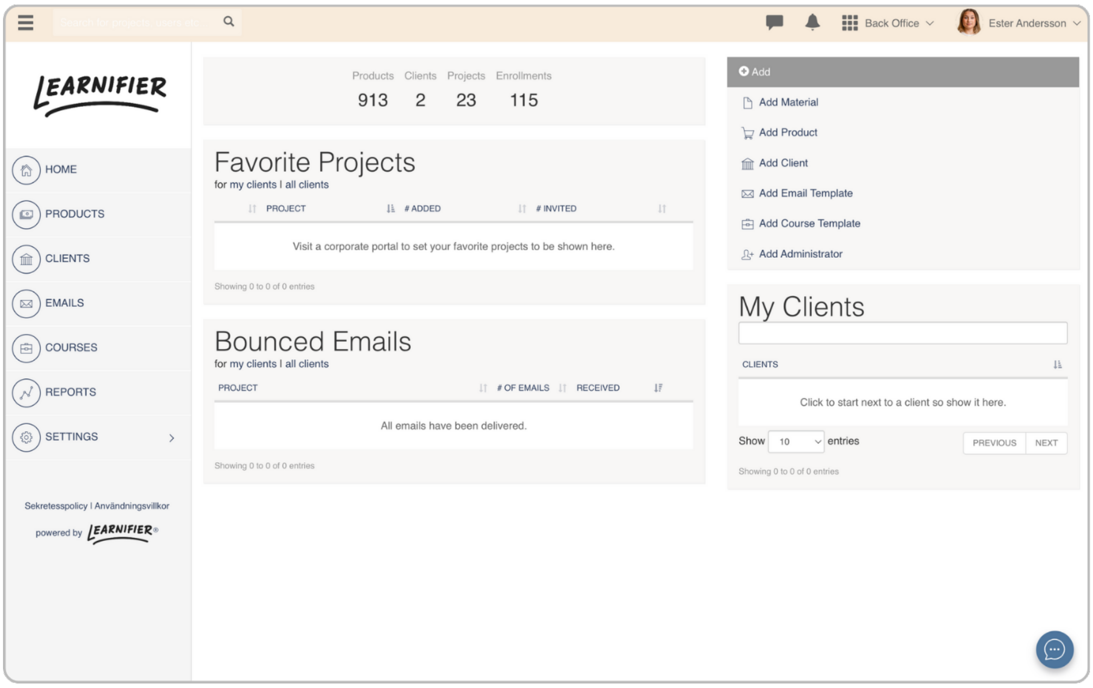
In this article, you will learn more about the function that is Back Office, which is a function that is available from the Enterprise price plan.

NOTE: Back Office is a powerful tool, and it is important that you know how to use it before performing tasks in Back Office. Please contact the support team if you would like assistance with this.

Note

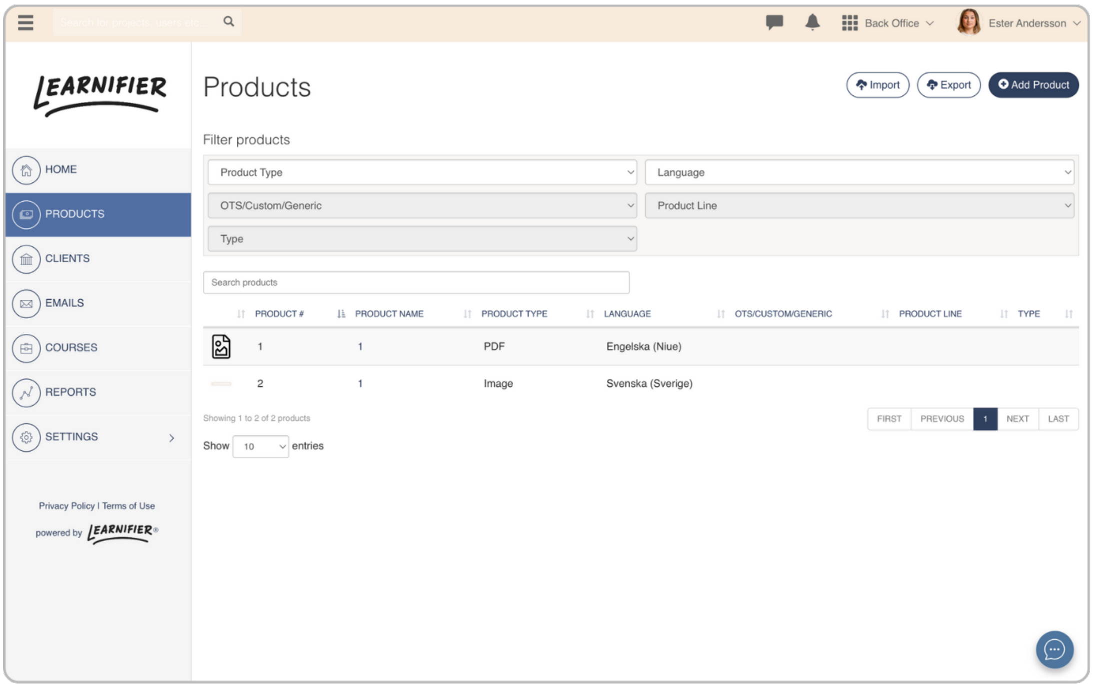
- Home
- Products
- Clients
- Emails
- Courses
- Reports
- Settings
- Tips & Tricks

The dashboard of the Back Office portal looks like this:

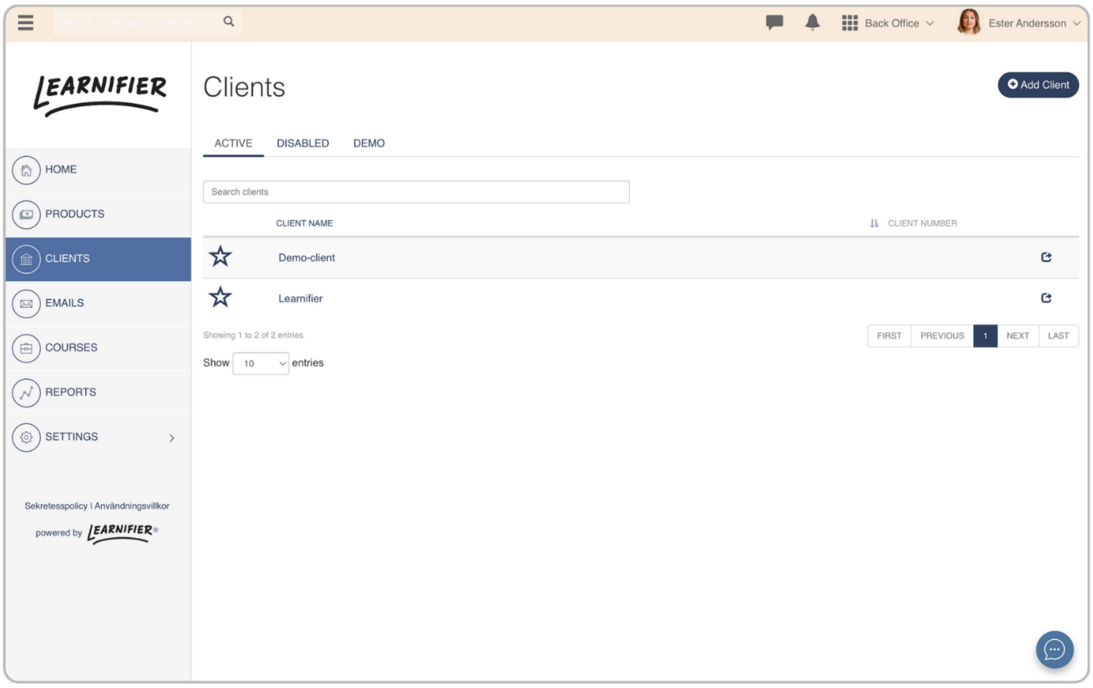


When logging into Back Office, we have a couple of tabs on our left side. These are the following:

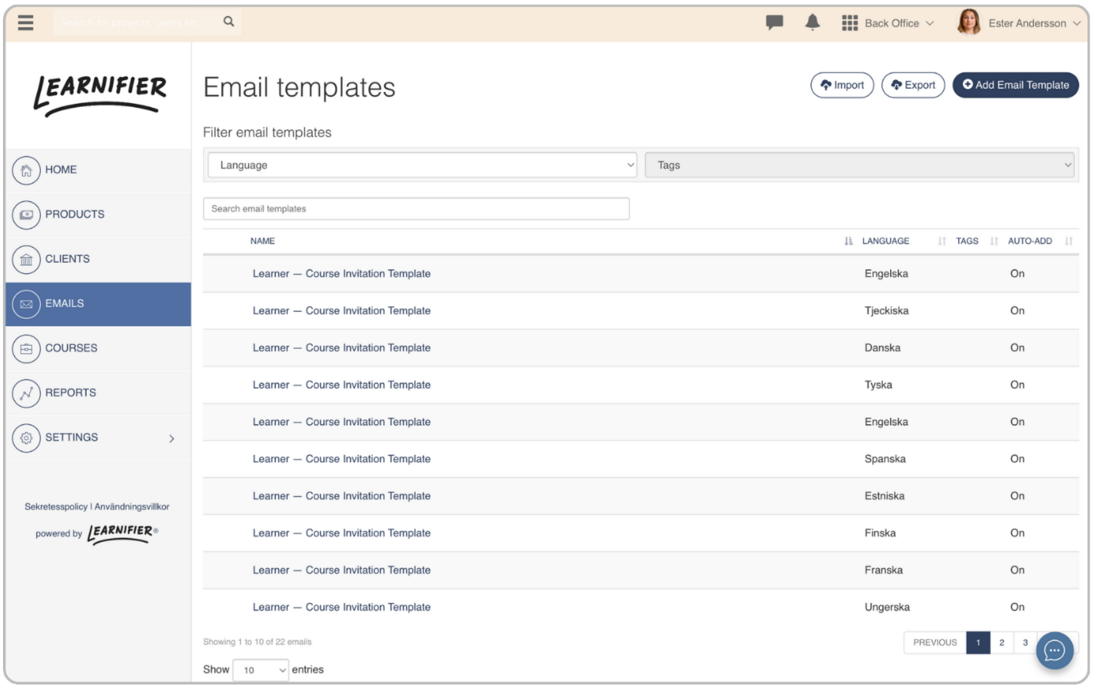
- **Home**
  - When clicking on “Home”, you navigate to the dashboard.
- **Products**
  - In the “Product” tab, you are able to add and manage different types of products that have previously been added to the Back Office.
  - In the top right corner, we have a button that says “Add product” where you can add material such as quizzes, surveys, and images. After you have added a product, you are able to transfer the product over to the different client portals (we will go through how you do this under “Clients”).



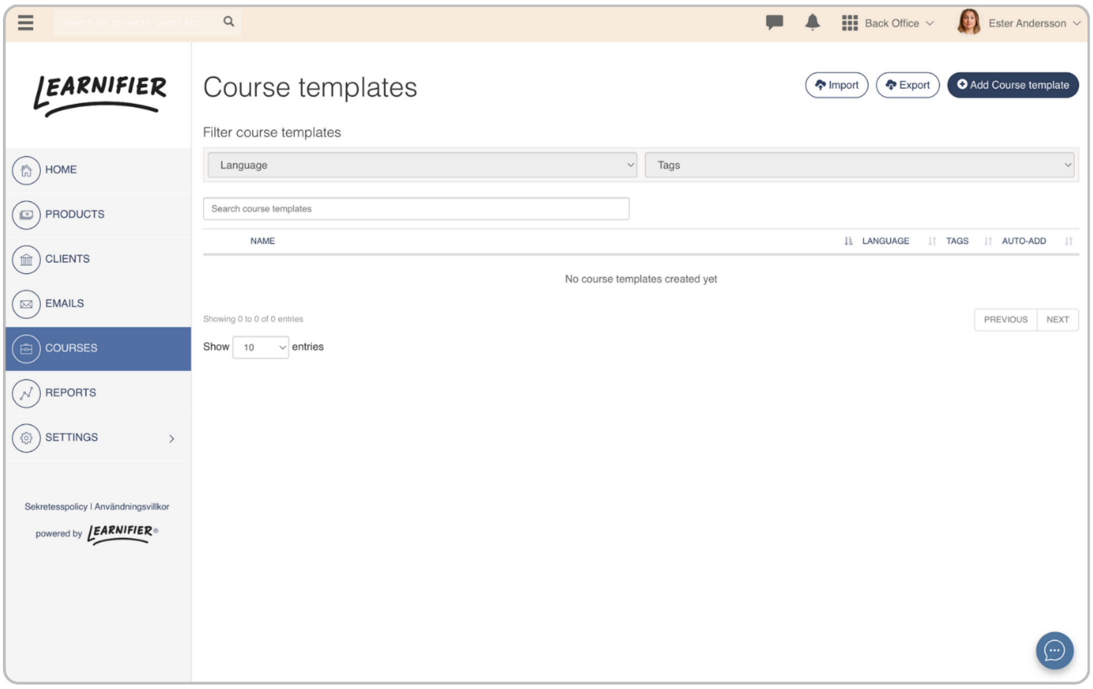
- **Clients**
    - In the "Clients" tab, we can see the different client portals that we have available on our platform. For example in the view above we can see that we have six clients on our platform. If we click, on one of the clients, we will get to the following overview:
    - From the tabs called "Products", "Emails", and "Courses" we are able to activate the products (Quizzes, images, surveys, etc.), email templates, and courses that we have created in Back Office.
    - For example, if you want to add a quiz that you created in Back Office, you click on "Products" and then search for the product under the title that says "Add product to client portfolio". Here we can search for the specific quiz, and click on the button that says "Activate Product" which will activate the quiz on the client portal.
    - If you would like to activate an email template in a client you click on "Emails" and then press the slide button over to "ON" on the email template that you would like to add to the client portal.
    - If you have created a course in Back Office and would like to add it to the client portal, you click on Courses and activate the course in the same way that you did with the email template.



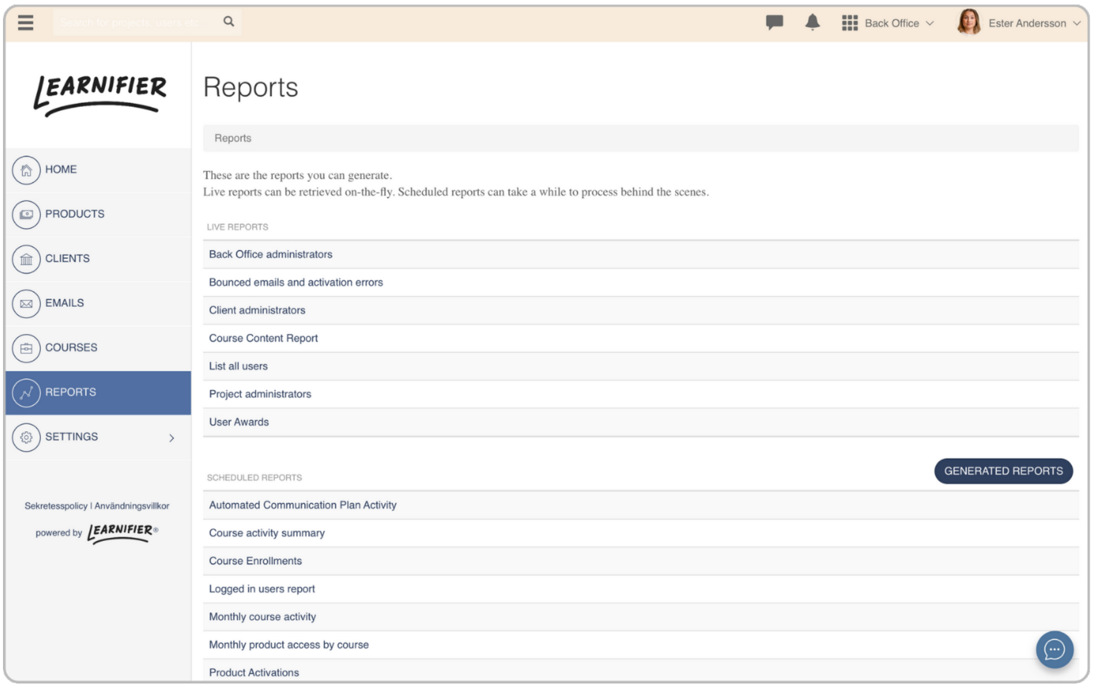
- **Emails**
  - In the “Emails” tab, you can add a template by clicking on “Add email template” in the top right corner. In the list, we are able to sort the different languages that are available and see the different email templates we have created.
  - You are able to add different email templates to your client by clicking on “Clients” and selecting the client to whom you which like to add your email template. Please see the previous section that is called “Clients” where we go through this.



- **Courses**
  - In Back Office, you are able to build courses that can be added to your different clients. A new course template can be added by clicking on "Add course template" in the top right corner of this site:
  - We are able with our created course template to add this to a specific client, by clicking "Clients" and after this add the specific course to the client. You can see more information of how you add a course to a client in the section "Clients".

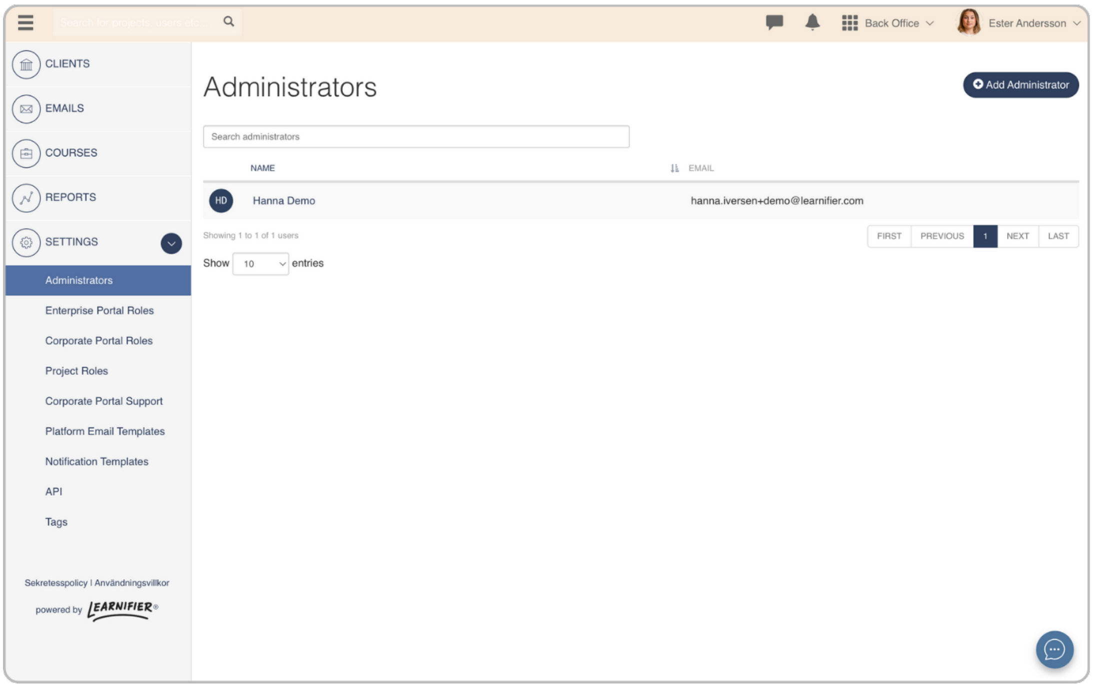


- **Reports**
  - Under the tab called "Reports" we are able to find different types of reports that we can acquire. Below are some reports that can be found useful:
    - "Logged in users report": Here you receive a report of all your logged-in users in total on your platform during a specific period of time.
    - "Client administrators": In the following report, you are able to find all administrators in all clients.
    - "Project administrators": In the following report, you are able to find all instructors in all clients.
    - "System Activity": Here you can find all clients, how many projects you have, and how many enrollments have been made to every project.



- **Settings**
  - From the Settings tab, you are able to set different types of settings! The different types of settings can be found below:
    - "Administrators" is the overview of the people that has back office permission.
    - "Enterprise Portal Roles" is where you are able to change the permissions for the Master administrator. You are also able to add a new role from here.
    - "Corporate Portal Roles" is the client-based administrator. Here we can see the permissions that the specific role has.
    - "Project Roles" is the project-based roles, such as the role "instructor". In this view we are able to see the permissions that different project roles have. We are also able to add a new project role from here.
    - "Corporate Portal Support" is a text that you can edit and can be found from the Dashboard-view in the admin interface. Down below you can see the text that can be shown:
    - "Platform Email Templates" are the different types of email templates that you can edit. One example of a platform email template is the "Calendar invitation" that is being sent out to participants if you have turned on the calendar invitation function on the specific project.
    - "Notification Templates" is the place where you can check different types of templates that is being used in the Learnifier system.

- “API “is the place where you set settings regarding API

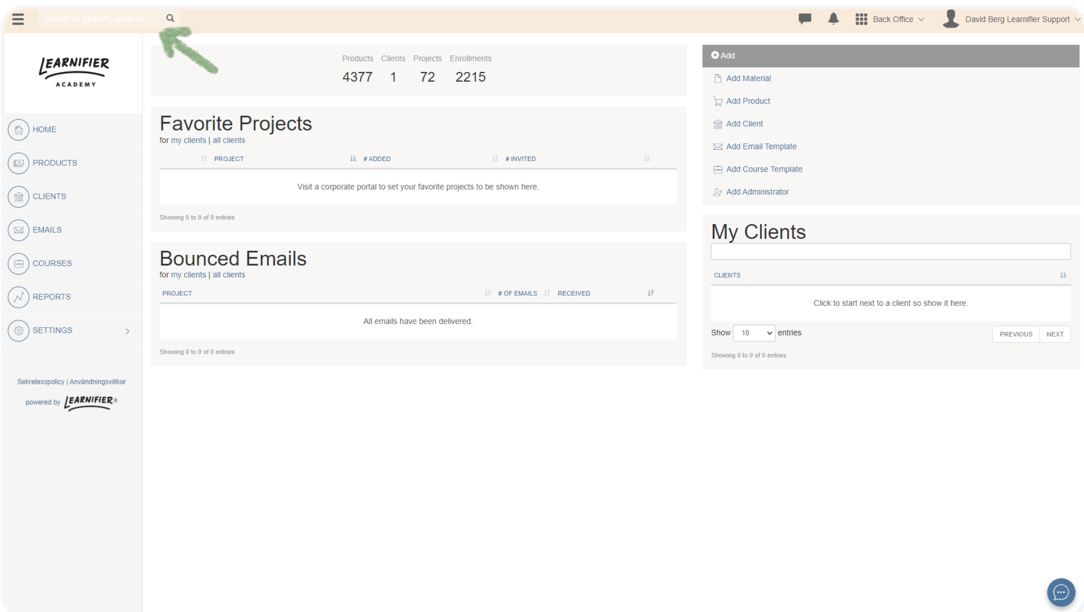


Tips & Tricks

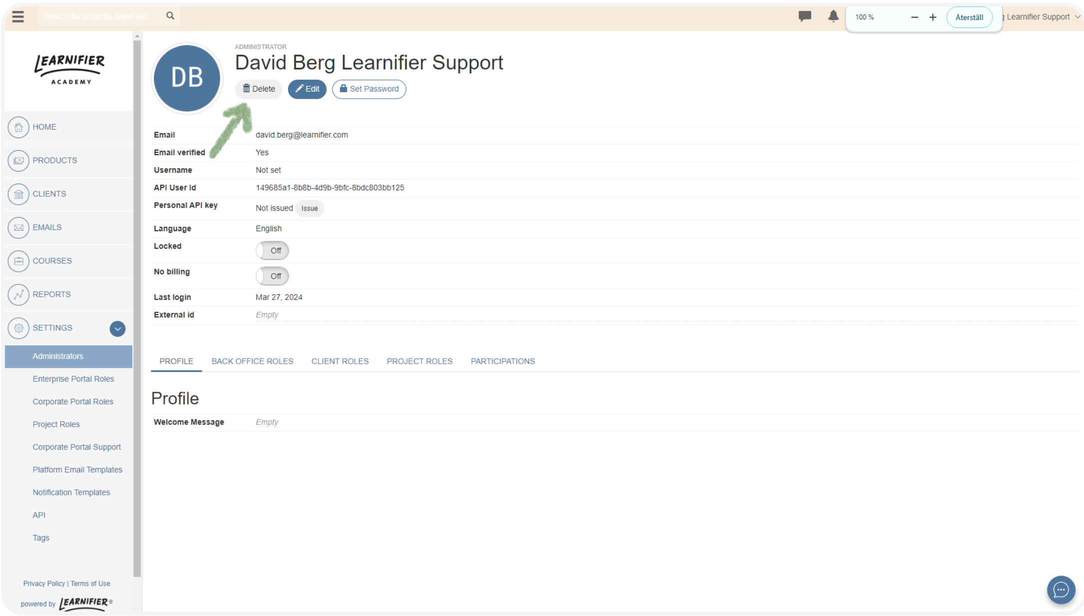
Delete users directly from Back Office:

If you would like to delete a user completely from your Learnifier system, then in that case this function is for you!

1. How you use this function is that you search for the user in the box at the top left corner.



2. When you have received information about a specific user you simply click on the user and then “Delete”.



NOTE: When you do this, the whole user profile will be deleted and there is no possibility to restore the data when being deleted.