




Admin Guide

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Profile Page


The Admin Profile Page offers you a simple and easy way to customize your organizational Cerego account. On this page you'll create a profile with the opportunity to add details such as a name, description, website, and social media links to your homepage.

 **Steps: Create or change the profile name**


1. Place your cursor in the box next to “name.”
2. Type the name of your organization or title of the training.
3. Scroll down and click on the green “Save” button.
4. The name will appear as the header on the home page.

 **Steps: Create or change the profile description**


1. Place your cursor in the box next to “description.”
2. Type the description of the content, including any specific goals for the learner.
3. Scroll down and click on the green “Save” button
4. This text will appear under the profile name and website address, if applicable, on the homepage.

 **Steps: Add or change the profile website**

1. Place your cursor in the box next to “website.”
2. Type the name of the desired site, beginning with “www.”
3. Scroll down and click on the green “Save” button.
4. This text will appear under the profile name on the homepage.

 **Steps: Add or change the profile social media connections**

1. Place your cursor in the box next to “Facebook” or “Twitter.”
2. Type the entire link to the desired social media pages. For example, type in “www.facebook.com/cerego” to link to the Cerego Facebook page.
3. Scroll down and click on the green “Save” button.
4. Organizational social media pages will be linked to the Facebook and Twitter icon on the homepage. Clicking on these icons will take you directly to the organizational social media accounts.

 **Pro Tip**

You can make changes in all areas before clicking save, if you'd like. The save button applies changes to the profile name, description, website, and social media links.

On this page you can also add a profile photo and background photo. It’s important to note that your profile photo will serve as an organizational icon throughout the Cerego system. The background photograph will appear on the homepage.



Steps: Add or change your profile photo

1. Under “Update Photo,” there are four ways to add a profile image:
 - Add a profile image by dragging and dropping the photograph.
 - Add a profile image by clicking “upload an image” and then selecting an image from your hard drive.
2. After you finish the uploading process, the image will save automatically.



Steps: Add or change your background photo

1. Under “Update Photo,” there are four ways to add a profile image:
 - Add a background image by dragging and dropping the photograph.
 - Add a background image by clicking “upload an image” and then selecting an image from your hard drive.
2. After you finish the uploading process, the image will save automatically.



Pro Tip

Use your organizational logo for your profile image and an image related to the product or team as your background image.

You can also preview your profile page, to ensure that the image, description, website and social media links are exactly how you want them.




Steps: Preview your profile page


1. Click on the green “Preview Profile” button.
2. After previewing the profile page, click the “back” button on your browser to return to the admin profile page.

App Branding


You can also preview your profile page, to ensure that the image, description, website and social media links are exactly how you want them.

 **Steps: Add your logo**


1. Click the “upload” button under “Add your logo.”
2. Using the pop-up window, select an image from your computer.
3. Click “open” to upload the image.
4. You’ll see the preview image in the box below.
5. The logo is automatically saved.

 **Steps: Remove your logo**


1. Click on the trash can icon on the logo image.
2. Refresh the page to confirm that the logo was removed.

 **Steps: Add custom-branded logo to the iOS Loading Screen**

1. Click the “upload” button under “Add a custom branded logo to the iOS Loading Screen.”
2. Using the pop-up window, select an image from your computer.
3. Click “open” to upload the image.
4. You’ll see the preview image in the box below.
5. The logo is automatically saved.

 **Steps: Remove custom-branded logo from the iOS Loading Screen**


1. Click on the trash can icon on the logo image.
2. Refresh the page to confirm that the logo was removed.

 **Pro Tip**

The custom-branding images should look good against dark and light backgrounds. Square or slightly rectangular images will work best for the logo, while a rectangular image will work best for the custom-branded loading screen. Keep in mind that it may take a few hours for these changes to take effect.

Staff

This page allows you to manage who is getting involved with your Cerego content. You can invite and remove staff using email addresses, as well as review your current staff and their roles.


 Terminology

Owner: Owners have complete access and control within the Cerego product, including the ability to add content, manage courses, and manage staff.


Admin: Admins are granted access through Owners. Admins can add content and manage courses, including assigning learners.

Content Manager: Content managers have access to the learning content, including the ability to add, delete, or edit content.


Editors: Editors are added to the system to edit and add items to sets.

 Pro Tip

You might note that, under the “Courses” tab, you have the ability to add “instructors” to your courses. Instructors can also add, delete, or edit content.

 Steps: Add staff


1. Click in the box with the “email address” prompt inside it. This click will highlight the box and give you a cursor.
2. Type the email address of the individual you’d like to add.
3. Using the drop-down menu, select a title for the staff member. If you’re unsure, review the terminology box to learn more about how different roles have access within the product.
4. After you select a role for the individual, click the green “Invite Staff” button.
5. An email invitation will be sent to the staff members’ address.

 Steps: Remove staff

1. To select staff members to remove, click on the checkbox next to the staff member’s name. You can also click the checkbox next to “Select all” to perform an action for all of the current staff.
2. Click on the orange “Remove” button.

OAuth

This page is the first step in your LTI integration process, which allows you to access Cerego content through another LMS. Integrating Cerego into an LMS, such as Blackboard or Canvas, is quick and easy. As part of this process, you’ll need a OAuth Key and OAuth Secret.

 **Steps: Create a New OAuth Key and Secret**

1. Click the green “Add OAuth Client” button.
2. In the new pop-up window, type in the name of the OAuth client, the web address where content will be directed, and the authorization callback URL.
3. Click the green “Create” button.

You will copy and paste these auto-generated codes into your LMS system. You can create as many codes as you need.

Departments

You can organize your content on a large scale by creating different departments. Each department can have its own courses, content, branding and staff. Switching between departments is easy, allowing you to quickly organize your content.



Steps: Create a department

1. On the top right hand corner of the page, click on the green “Add a Department” button.
2. Type the new department name in the box. Be careful when naming a department. Your department name cannot be changed within the system. To change a department name, you’ll have to email support@cerego.com
3. Click the green “Create Department” button.



Pro Tip

The image you uploaded as your profile photo will automatically become the profile image for any new departments. To change this image, switch departments and then upload a new image.



Steps: Switch Departments

1. Click on the departmental name on the top right hand corner.
2. Click on “Switch Departments.”
3. Select the department you’d like to work within and click on it.
4. The system will automatically take you to the selected department.

After a department is created, you can view the department in this section under the “Department” tab. Just scroll down a bit. You can search for departments by typing the department name into the search box and you can organize your search alphabetically.

Features

The Features section can help you customize your Cerego experience. This feature is part of certain Cerego accounts, so talk to your sales representative if you’d like to learn more.

You can turn features on and off easily by clicking the buttons next to the feature names. Let’s go over what each feature involves.

The “Require Member IDs” feature

The “Enable course enrollment links” feature allows you create a course enrollment link that you can send via email, text, or social media. When you activate this tab, you’re enabling the feature in the Courses section of Cerego.



Pro Tip

Use the analytics page for an overview of overall progress and individual learner progress. These visual representations can help you spot who is struggling or who has not kept up with their schedule quickly — without downloading a report.

If you need any guidance or tips, just reach out.
We're always happy to help!

The Cerego Team

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