



Accounting CPE Portal Admin User Guide

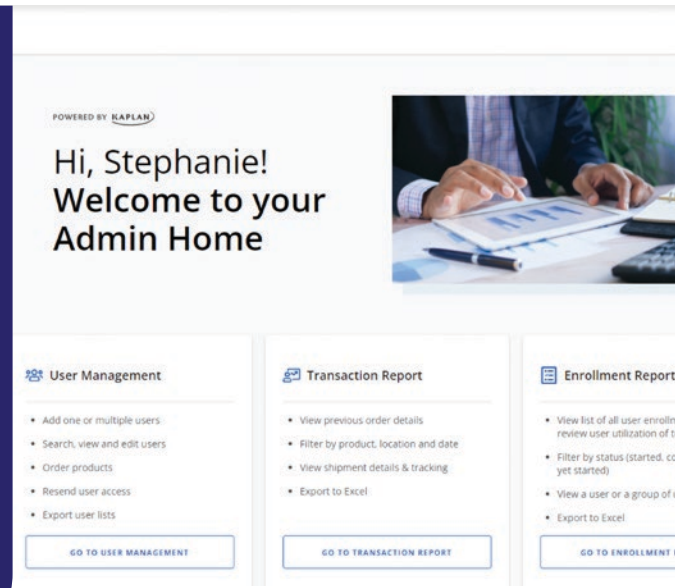


Table of Contents

Access Your Portal	2
• Sign In	
Admin Home	2
User Management	3
• Export a List of Users	
• Add a New User	
• Add Multiple Users via CSV	
• Expire a User's Access	
Reports	5
• CE Report	
• Enrollment Report	
• Transaction Report	
Student Home	6
• My Learning	
• Explore Catalog	
Contact Your Account Manager	7

Access Your Portal

SIGN IN

1. Navigate to [https://home.kaplanlearn.com/portal/\[portalcode\]](https://home.kaplanlearn.com/portal/[portalcode]).
2. Click "Sign In"
3. Enter your email address and password, and then click "Sign In."

Reset Your Password

Click the "Forgot your password" link and enter the email address associated with your administrator account.

Admin Home

As an administrator, Admin Home is where you can find admin tools and reports available to you. Your administrator permissions determine which features are available to you and which tasks you can perform.

Feature	What You Can Do
User Management	<ul style="list-style-type: none">• Search for an existing user• Add a new user or add multiple users• Expire a user's access to your portal• Export list of users
CE Report	<ul style="list-style-type: none">• View CE/CPE enrollment and completion information within a date range
Enrollment Report	<ul style="list-style-type: none">• View enrollment and completion information for all programs
Transaction Report	<ul style="list-style-type: none">• View your portal's transaction history

User Management

Export a List of Users

Follow the steps below to export a list of users.

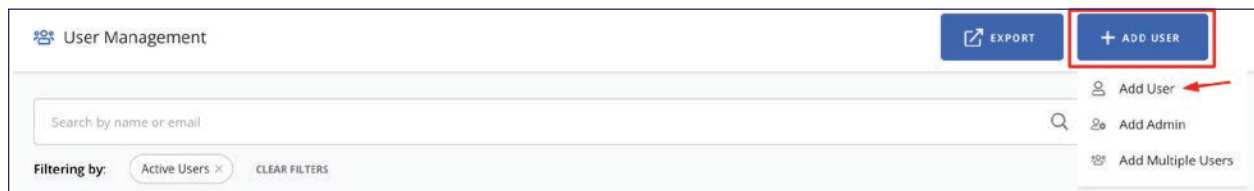
1. From the Admin Home, go to User Management.
2. Change the filters to match the list of users that you want to be exported.
3. Click the Export button.
4. An XLSX file will be downloaded to your device.



Add a New User

Follow the steps below to create a new user account.

1. From Admin Home, go to User Management.
2. At the top-right of the page, click the **Add User** button.
3. From the dropdown list, select **Add User**.

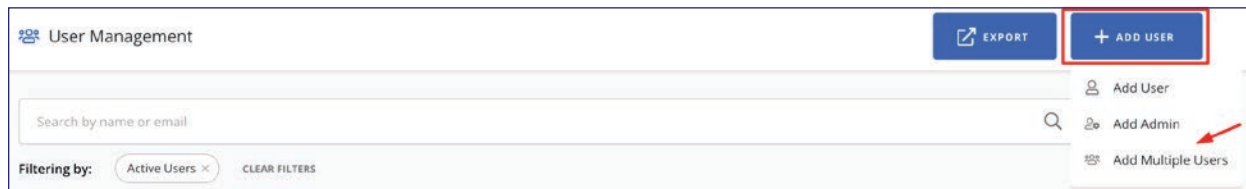


4. Add the account information.
 - At a minimum, we require an **Email address, First name, and Last name**
 - Additional required information such as a reporting location and employee ID may be required based on your portal's settings.
 - (Optional) To send account information to the users, enable the Send toggle to send an email to the new user with their sign-in information.
 - To finish adding the new user, click **Save**.

Add Multiple Users via CSV

Follow the steps below to create accounts for multiple users using a CSV file.

1. From Admin Home, go to User Management.
2. At the top of the page, click the **Add User** button.
3. From the dropdown list, select **Add Multiple Users**.



4. Download the CSV template.
5. Open the downloaded template in Microsoft Excel and enter the information for each user you would like to add. The * indicates the required fields.
 - First Name *
 - Middle
 - Last Name *
 - Suffix
 - Email *
 - Phone
 - Phone Extension
 - External ID (This is a unique ID like an employee ID and may be required based on your portal's settings)
 - Address fields
6. Upload the completed CSV file.
7. You may need to choose a reporting location if your portal has a reporting location. The imported users will be attached to the reporting location you selected.
8. (Optional) To send account information to the users, enable the Send toggle to send an email to the new user with their sign-in information.
9. Click **Import Users**.

Expire a User's Access

Follow the steps below to expire a user's access to your portal.

From the Admin Home, go to User Management.

1. Search for the user using their name or email address.
2. Click on the user's name to view their account. A slide-out panel will appear.
3. Click on the **Edit** icon.
4. In the Additional Information section, go to **Portal Access Termination** Date to set the account expiration date.
5. Click **Save** to submit your changes.

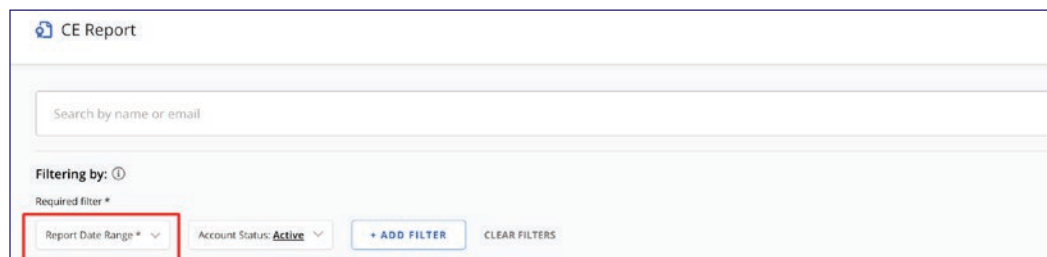
Reports

CE Report

The CE report shows CE and CPE enrollments and completions for a given date range.

To access the report:

1. Click on **CE Report** on Admin Home.
2. To generate your report, select the report date range by clicking on the **Report Date Range** filter. You can add additional filters to narrow down the search results further.



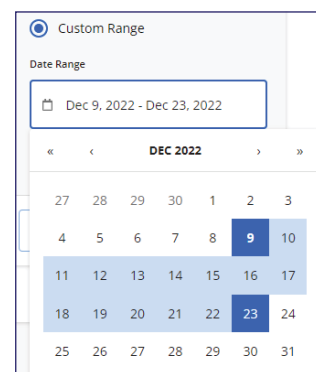
The screenshot shows the 'CE Report' filter interface. It includes a search bar labeled 'Search by name or email'. Below it, the 'Filtering by:' section shows a 'Required Filter *' dropdown menu with 'Report Date Range' selected. To the right of this dropdown is another dropdown menu for 'Account Status' with 'Active' selected. There are also buttons for '+ ADD FILTER' and 'CLEAR FILTERS'.

For the report date range you selected, we show the following:

- Number of students who enrolled/completed courses
- Number of courses completed
- Number of total credit hours earned
- Number of courses completed by month

When choosing a custom date range, you must click on the first date, then click on the last date.

To export this report to Excel for more information, click on the **Export** button. The exported file will have two tabs: **Summary** and **Detail**.



The screenshot shows a 'Custom Range' date picker. It has a 'Date Range' section with a calendar icon and the text 'Dec 9, 2022 - Dec 23, 2022'. Below this is a calendar for 'DEC 2022'. The calendar shows dates from 27 to 31. The date '9' is highlighted in blue, and the date '23' is also highlighted in blue, indicating the selected date range.

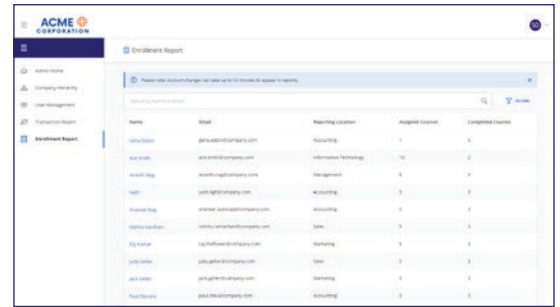
Tip: To view detailed information, click on the **Details** tab in the Export. You can see all courses assigned to each student and related information for each course such as the status (Not Started, In Progress, Complete) and the credit hours earned.

Enrollment Report

The Enrollment report export offers course-related information like course name and course status for all product lines.

To access it, click on Enrollment Report on the Admin Homepage.

The columns include name, email, reporting location, number of assigned courses, and number of completed courses. The records can be filtered by course name, and the user's course status such as "not started", completion date range, and enrollment date range. A search bar at the top allows the administrator to search for a specific student.



Name	Email	Reporting Location	Assigned Courses	Completed Courses
John Doe	john.doe@company.com	Accounting	1	0
Jane Smith	jane.smith@company.com	Information Technology	1	0
Michael King	michael.king@company.com	Management	1	0
Emily White	emily.white@company.com	Accounting	1	0
Robert Brown	robert.brown@company.com	Accounting	1	0
Patricia Green	patricia.green@company.com	Accounting	1	0
David Black	david.black@company.com	Accounting	1	0
Michelle Lee	michelle.lee@company.com	Accounting	1	0
James Hall	james.hall@company.com	Accounting	1	0
Sarah Young	sarah.young@company.com	Accounting	1	0

You can export this report to Excel for more information.

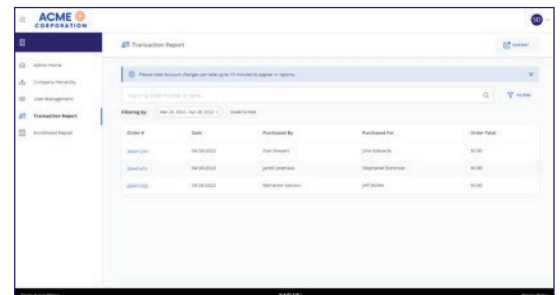
Tip: To view completions only, use the **Status** filter and select "Completed". You can also use the **Completion Date** filter to view completions within a specific date range. Export to report Excel.

Transaction Report

The Transaction Report shows all orders made in your portal.

To access it, click on Transaction Report on the Admin Homepage.

A default date range of one month will be set and initial results will be displayed. You can use additional filters to narrow the search results or use the search bar to find records by order number or student name.



Order #	Date	Purchased By	Purchased For	Order Total
1000001	10/25/2022	John Doe	John Doe	\$1.00
1000002	10/25/2022	John Doe	John Doe	\$1.00
1000003	10/25/2022	John Doe	John Doe	\$1.00

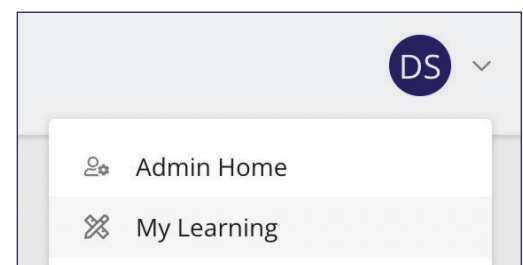
You can export this report to Excel for more information.

Student Home

In order for students to have access to your portal, Admins need to first add the user to the portal (see above instructions, under User Management).

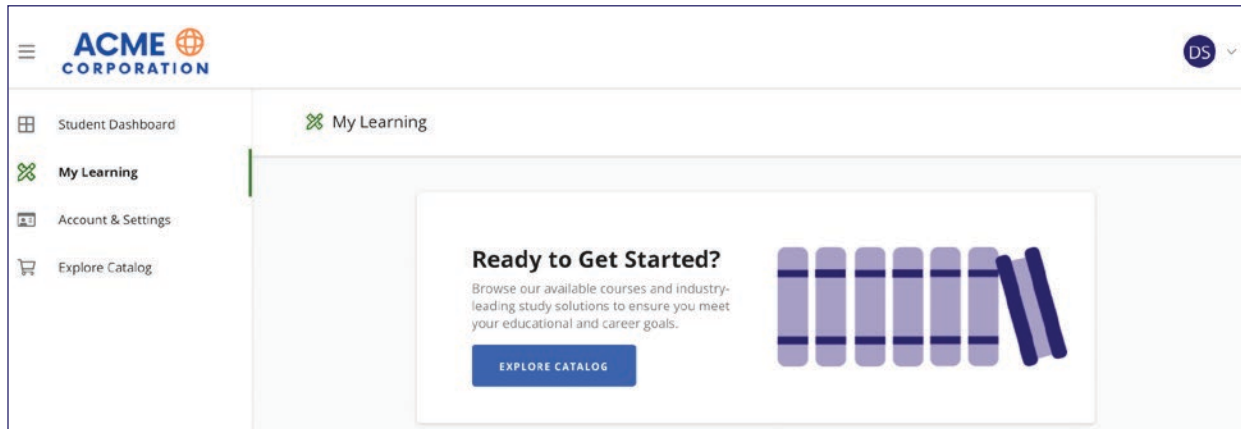
My Learning

To access your courses or preview the learner experience, go to the avatar on the top right corner and access My Learning. You can use the avatar to toggle between Admin Home and Student Home.



Explore Catalog

To view and enroll in courses, click on **Explore Catalog**.



Contact Your Account Manager

Your account manager is the escalation point of contact for any issues that are not able to be resolved through Customer Support and is the contact for any reconfiguration requests for your Kaplan Financial Education Portal.

Customer Support: 800-824-8742

Customer Support is available 9:00 am–6:00 pm ET, Monday–Friday

Please note that after-hours support is available by emailing kfeducation@kaplan.com. Requests will be responded to within 24 hours. For use by administrators and learners to place orders, ask questions about class schedules, and/ or inquire about orders that have been placed (tracking).