



Kaplan Portal Guide For Admins



Your new Kaplan portal is designed with both organization administrators and students in mind. You will be able to:

- **Customize:** Welcome students with optional features such as utilizing your logo, adding custom messaging, or your organization's custom colors.
- **Organize:** You decide what products to display for purchase within your portal.
- **Analyze:** Manage student information, track orders, and well as monitor course progress.

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Getting Started

Access Your Portal

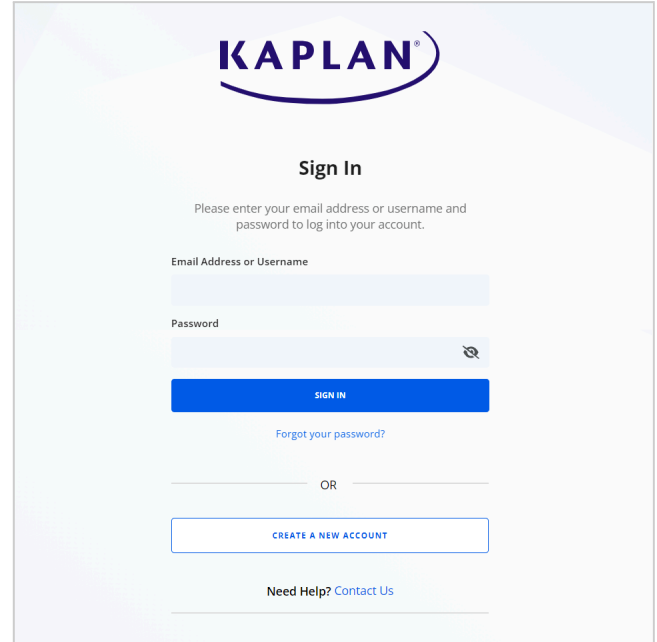
The pre-sign in page is the main landing page for your portal. This area can be customized to include your logo and any messaging you would like to share with your users prior to signing in.

New Users:

To request a new admin account, please contact your Customer Engagement Manager. You can also click **Create an Account** to create your own account on the portal, however it will be a standard user account until your Customer Engagement Manager provides admin permissions.

Existing Users:

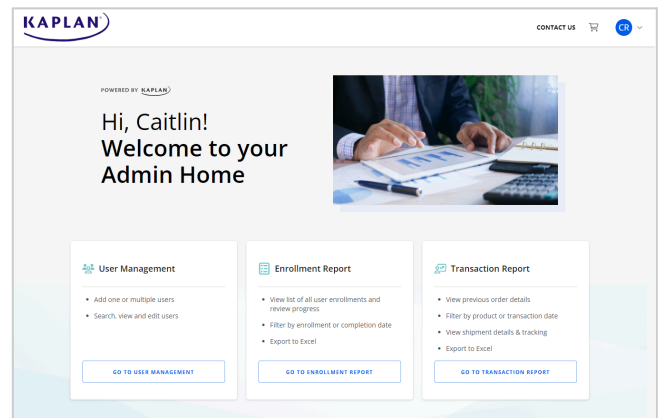
To sign into your portal, click on the **Sign In** button, and enter your email address and password.



Admin Home

After signing into the portal, administrators will have access to a variety of tools and reports from the **Admin Home** dashboard.

The tools and reports are permission-based, so please contact your Customer Engagement Manager if there are additional resources you would like access to.

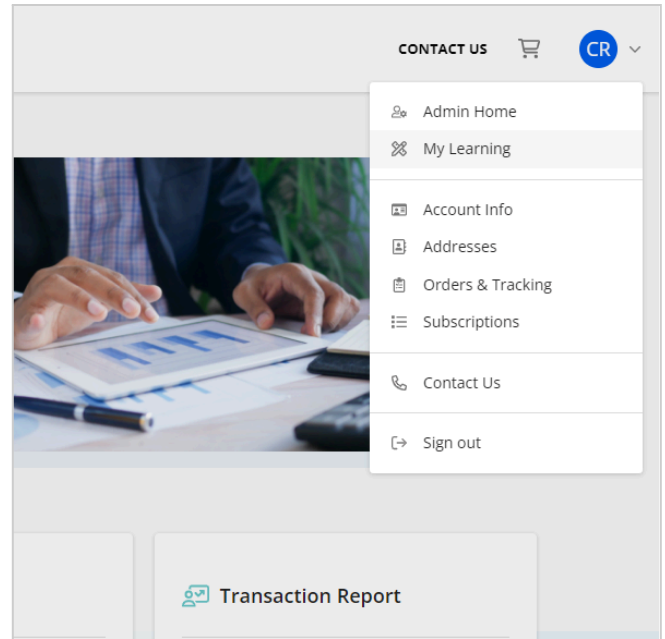


Navigate Between Admin and Student Experience

To navigate from the Admin Home dashboard to the student experience, click the profile icon in the top right corner of the portal.

In the drop down list, select **My Learning**. This directs users to the student experience on the My Learning page.

To navigate from the student experience back to Admin Home, click the profile icon on the top right corner of the portal and select **Admin Home**.

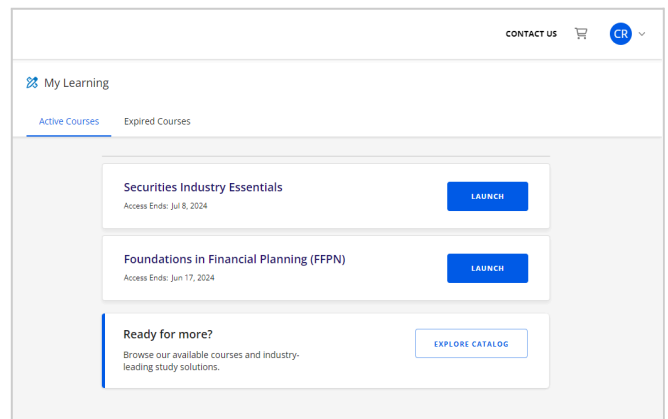


My Learning

From the My Learning page, you can view the list of any courses you have enrolled in, whether the courses are active or expired.

Clicking **Launch** will take users to the Learning Management System where their program content can be accessed.

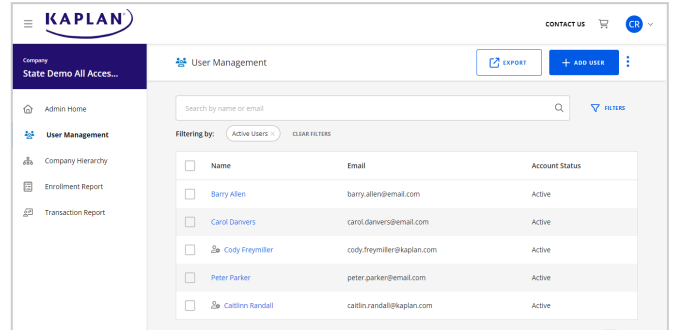
From the My Learning page users can also browse the portal store to view or enroll in additional courses by clicking **Explore Catalog** from the left navigation menu, or the button at the bottom of the My Learning page.



Admin Tools

User Management

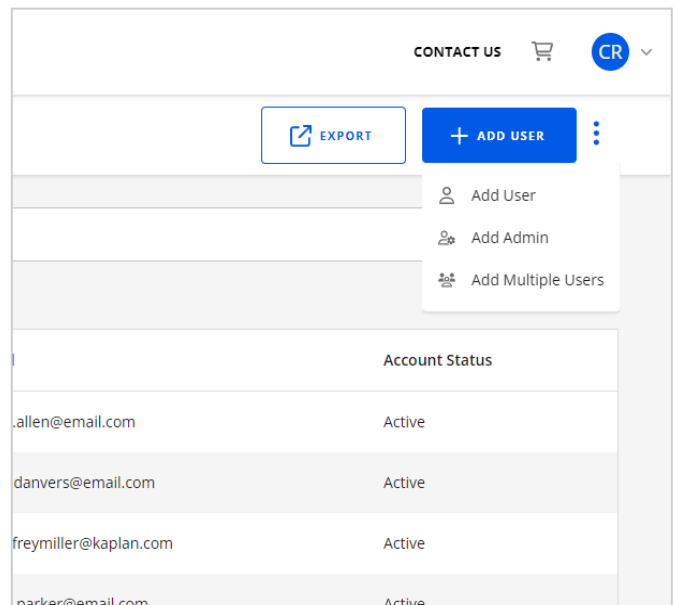
User management allows you to view and modify student accounts as needed. You can add or remove students from the portal, as well as add or remove administrators, and assign each administrator the relevant permission groups.



Adding Individual Users to the Platform

To add users to your portal individually, click the **Add User** button at the top right of the User Management page, then select **Add User**. Complete the required fields, and click **Save**.

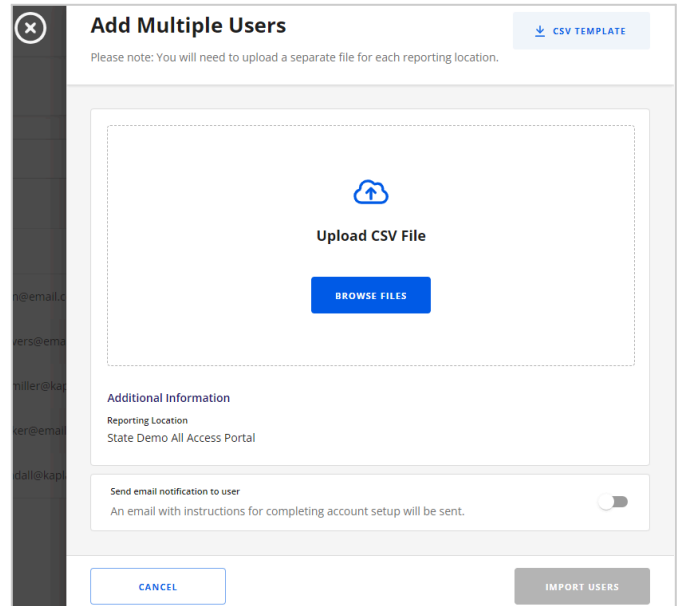
Note: minimum requirements for user account creation include First Name, Last Name, and Email Address.



Adding Multiple Users to the Portal

To add multiple users to the portal at the same time, click the **Add User** button at the top right of the page, then select **Add Multiple Users**. Download the **CSV Template** from the top right of the page, and complete the required fields for each user. Save the CSV template to your device. Click **Browse Files** and search for the CSV template you saved to your device.

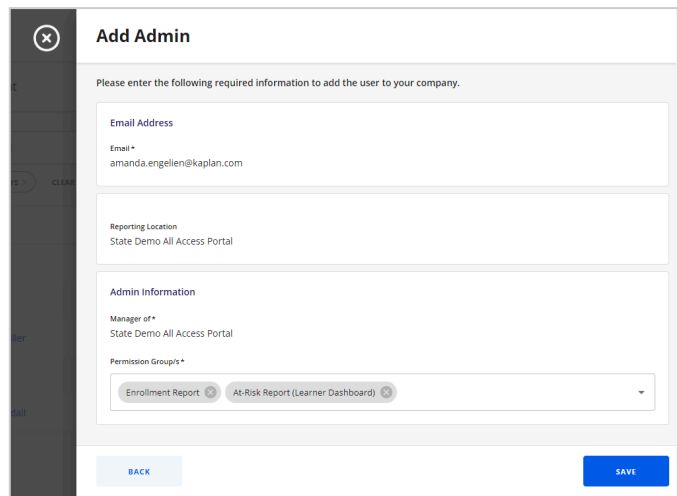
To send an email notification to users that their account has been created, including instructions to complete their account setup, click the toggle button. Next, click **Import Users**. If there are any errors, follow the instructions provided on the page.



Adding Administrators to the Portal

To add an administrator to your portal, click the **Add User** button at the top right of the User Management page, then select **Add Admin**. Complete the required fields, including the permission group(s) this administrator should have access to.

Note: administrator account creation is only available to some administrators, but may not be available to all based on your organization's preference. If you believe you should have this permission enabled on your account, please contact your Customer Engagement Manager.

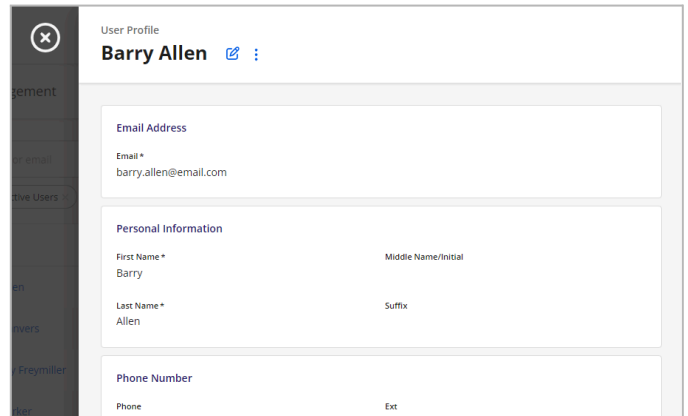


Manage Student Information

Use the search bar on the User Management page to find an individual student's account. Search using the user's name or email address.

To view details and manage student profile information, click on the user's name in the results list. A new panel will open containing student's profile information.

To edit the user profile, click the **pencil icon** next to the user's name. After editing, click **Save**.



The screenshot shows a 'User Profile' form for 'Barry Allen'. The form is divided into three sections: 'Email Address', 'Personal Information', and 'Phone Number'. The 'Email Address' section contains the email 'barry.allen@email.com'. The 'Personal Information' section contains 'First Name *' (Barry), 'Middle Name/Initial', 'Last Name *' (Allen), and 'Suffix'. The 'Phone Number' section contains 'Phone' and 'Ext'.

Email Address	
Email *	barry.allen@email.com

Personal Information	
First Name *	Middle Name/Initial
Barry	
Last Name *	Suffix
Allen	

Phone Number	
Phone	Ext

Transaction Report

The transaction report provides a summary of all orders placed on the portal. The report can be searched by student name or email, or can be filtered to a specific date range.

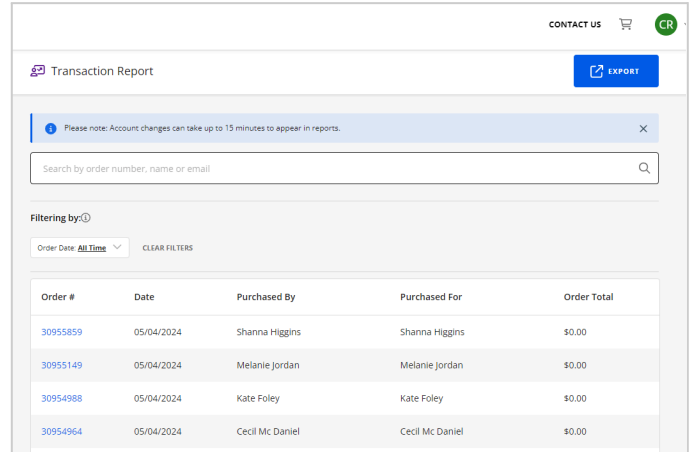
To access the transaction report, click the **Transaction Report** link on the **Admin Home** dashboard, or from the left navigation bar of the portal.

To view data in the transaction report, first create a filter for the order date range you would like to review, then click **Apply**.

Once the parameters for your report have been selected, you can export this report by clicking the **Export** button from the upper right corner of the page.

To view details of a specific order, click on the order number within the results list. A panel will open, from which you can view additional order details.

Note: Account changes can take up to 15 minutes to appear in reports.



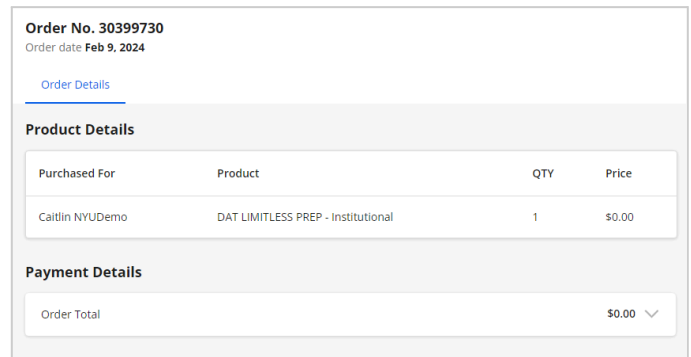
Transaction Report

Please note: Account changes can take up to 15 minutes to appear in reports.

Search by order number, name or email

Filtering by: Order Date: All Time CLEAR FILTERS

Order #	Date	Purchased By	Purchased For	Order Total
30955859	05/04/2024	Shanna Higgins	Shanna Higgins	\$0.00
30955149	05/04/2024	Melanie Jordan	Melanie Jordan	\$0.00
30954988	05/04/2024	Kate Foley	Kate Foley	\$0.00
30954964	05/04/2024	Cecil Mc Daniel	Cecil Mc Daniel	\$0.00



Order No. 30399730
Order date: Feb 9, 2024

Order Details

Product Details

Purchased For	Product	QTY	Price
Caitlin NYUDemo	DAT LIMITLESS PREP - Institutional	1	\$0.00

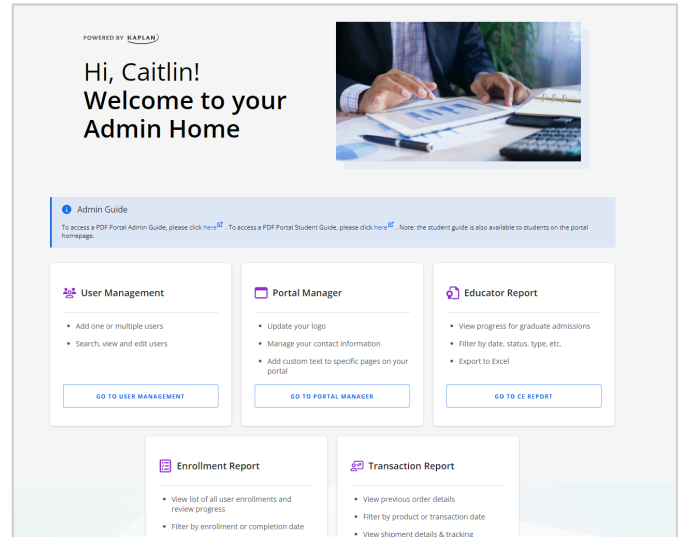
Payment Details

Order Total	\$0.00
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Student Progress Reporting

The portal offers a variety of program-specific progress and performance reports. These progress reports can provide administrators and faculty with insights into how learners are utilizing their study materials. Due to the varied nature of each program’s configuration, these reports are accessed individually.

Note: Administrators and Faculty will be provided with access to the reports that are relevant to them, so not all administrators will have access to every report.



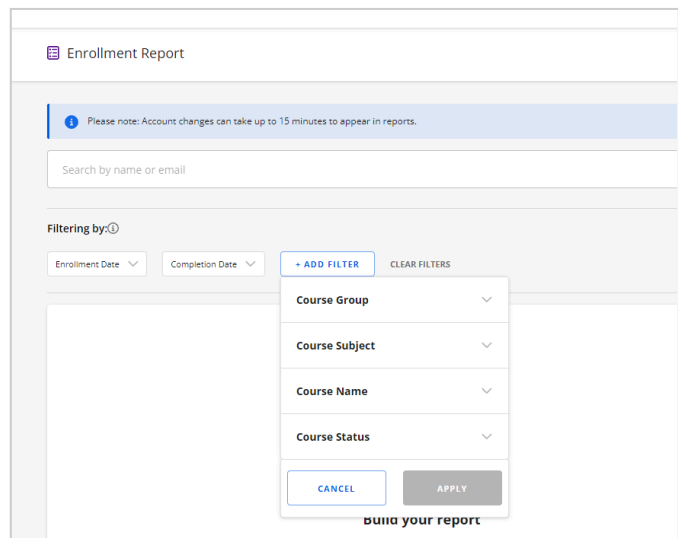
Enrollment Report

To view progress and performance for courses related to Business and Financial Services (see list below), please access the **Enrollment Report** from the **Admin Home** dashboard.

This report shows the last access date for each learner, as well as exam scores and utilization of supplemental study tools. The enrollment report can be viewed in the portal interface, or can be exported to an Excel file for data management.

The Enrollment Report is best used for programs including:

- Real Estate Licensing
- Home Inspection Training
- Wealth Management Designations (such as WMS, FPQP, and others)
- Advanced Financial Designations (such as FRM and CAIA)



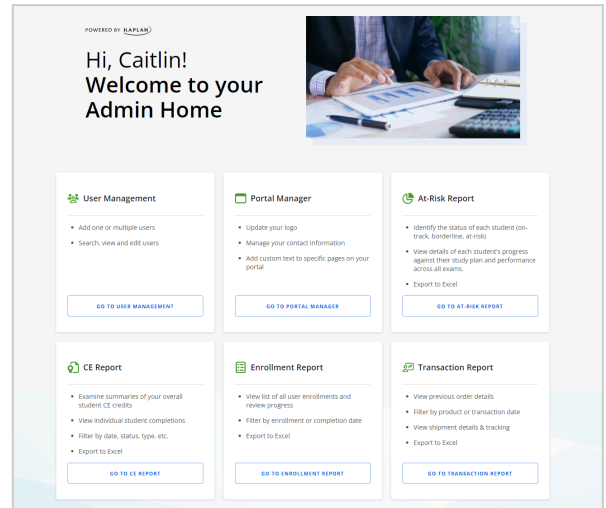
At-Risk Report

Kaplan’s At-Risk Report uses predictive analytics to identify the likelihood of learners passing or failing their financial licensing or credentialing exams. Armed with the right data, your organization can increase pass rates and improve speed to productivity by identifying at-risk learners and providing prescriptive remediation early in their exam preparation.

To access the At-Risk Report, navigate to the **At-Risk Report** link from the **Admin Home** dashboard.

The At-Risk Report is available for programs including:

- Insurance Licensing
- Securities Licensing
- CFP certification education
- CFA exam preparation



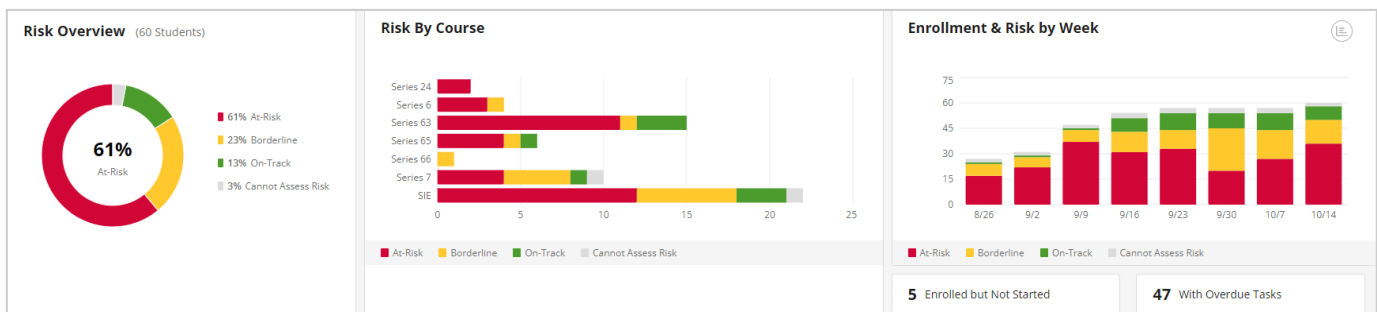
The At-Risk Report categorizes learners into three different risk statuses based on overall performance:

- **On-Track**, represented by green, identifies learners who are doing well and do not require intervention.
- **Borderline**, represented by yellow, identifies learners who are in the moveable middle. This is the group that you can likely move to on-track by providing early intervention.
- **At-Risk**, represented by red, identifies learners who need learning intervention to get back on track.

At-Risk Report Dashboard - Overview







The At-Risk Dashboard provides you an overview of your learners’ performance at a glance.

- Risk Overview shows the percentage of learners who are At-Risk, Borderline, and On-Track.
- Risk by Program (for Securities Licensing only) shows an overview of the risk breakdown by Series.
- Risk By Week shows the progression of the risk breakdown over time.



At-Risk Report Dashboard - Learner List

By default, the learner list displays active learners who have a status of first attempt or retake, sorted from highest risk to lowest risk, so you can focus your attention on learners who are At-Risk and Borderline.

<p>Name Course Status Risk Status</p>	<p>Tamara Gould SIE · 09/24/2024 · 1st Attempt</p>  <p>At-Risk</p>	<p>The first column displays the learner's name, course subject, scheduled start date, and exam status.</p> <p>The risk meter identifies the level of risk for each learner based on their pace and performance.</p>
<p>Tasks Completed</p>	<p>92%  100% due</p>	<p>The Tasks Completed column shows the percentage of total tasks due and the actual percentage of tasks the learner has completed.</p> <p>If a learner is At-Risk or Borderline in terms of overall pace, a red or yellow flag will display.</p>
<p>Last Fixed Exam</p>	<p>75% score Mastery Exam  10/06/2024</p>	<p>The Last Fixed Exam column shows the last fixed exam (checkpoint or unit exam) the learner has taken, along with the corresponding score and exam date.</p> <p>If a learner is At-Risk or Borderline in terms of overall performance, a red or yellow flag will display.</p>
<p>QBank Score / Used</p>	<p>77% score 42% Used 987 / 2330 Questions</p>	<p>The QBank column shows key metrics related to the QBank, including the percentage and number of QBank questions answered, and the learner's overall score.</p>
<p>Actions</p>	<p> Complete Overdue Tasks  Improve Exam Scores</p>	<p>The Actions column indicates the actions the learner can take to lower their risk. This may include actions such as "Complete Overdue Tasks" or "Improve Exam Scores."</p>
<p>Login as Learner</p>	<p></p>	<p>The Login as Learner icon provides administrators read-only access to the learner's LMS, to review the individual Performance Tracker or any other areas of the learner's coursework in greater detail.</p>

Additional At-Risk Report Features

- **Search** - Use to search for a specific learner by their name.
- **Filters** - If needed, apply additional filter criteria such as Reporting Location or Scheduled Start Date.
 1. After selecting your additional filters, click Apply to update the report.
 2. You can reset the filters back to default at any time by clicking Reset.
- **Export** - The At-Risk Report can also be exported to Excel by clicking on the export button in the upper-right corner. This allows you to easily view trends across all learners by individual learner or by exam topic. You can filter and sort the Excel file to easily consume learner data that is relevant to you.

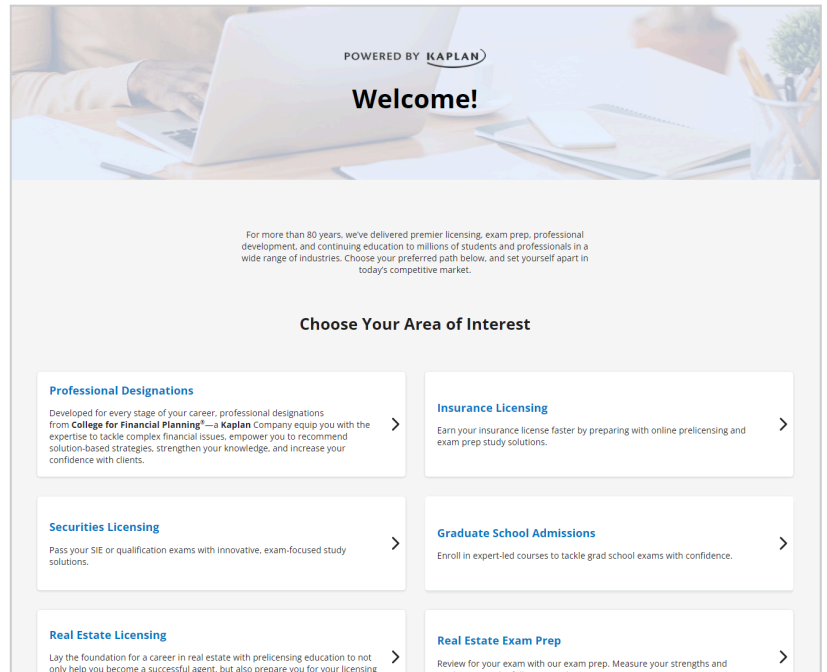
Enrolling in Programs

Admin Ordering

Admin ordering on the portal will be a two step process:

- First, you will create the accounts for each student. This can be done individually or in bulk. Please refer to User Management above for more information.
- Second, you will begin the order by selecting the applicable product(s).

After creating your user accounts, return to the **Admin Dashboard**, or click **Admin Ordering** from the left navigation menu, to view all programs that are available to your organization.

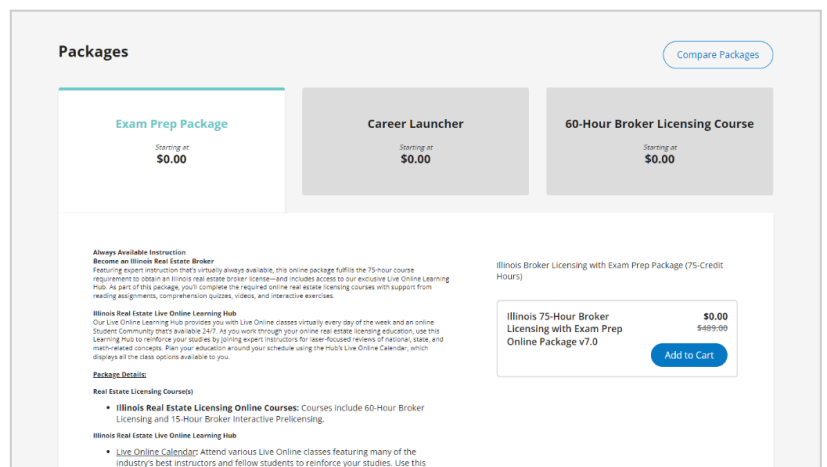


Browse Programs

You will first choose their area of interest, and navigate within the portal store to the different packages that are available.

To view more information about what is included in a particular package, click **View Details** next to any package.

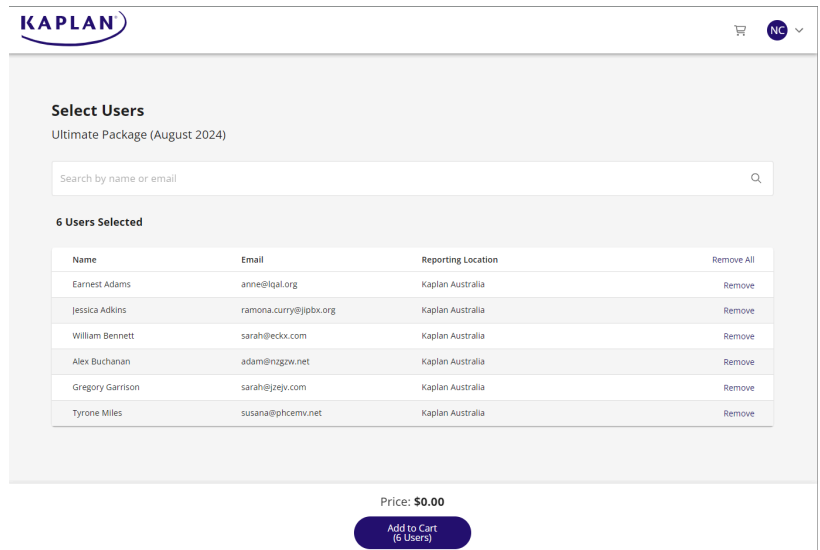
After finding the correct package, click **Add to Cart** to proceed through any options or add-on products that may be desired for the order.



Select User(s)

After adding the package to your cart, you will then be prompted to select the user(s) for whom you are placing the order. You can easily search by name or email address. You can also copy numerous email addresses from a spreadsheet and paste into the search bar, which will dynamically generate the list of users related to each email address.

After selecting each applicable user to add to the order, click **Add to Cart**. You will then review the selections you have made in the Cart Summary before proceeding.

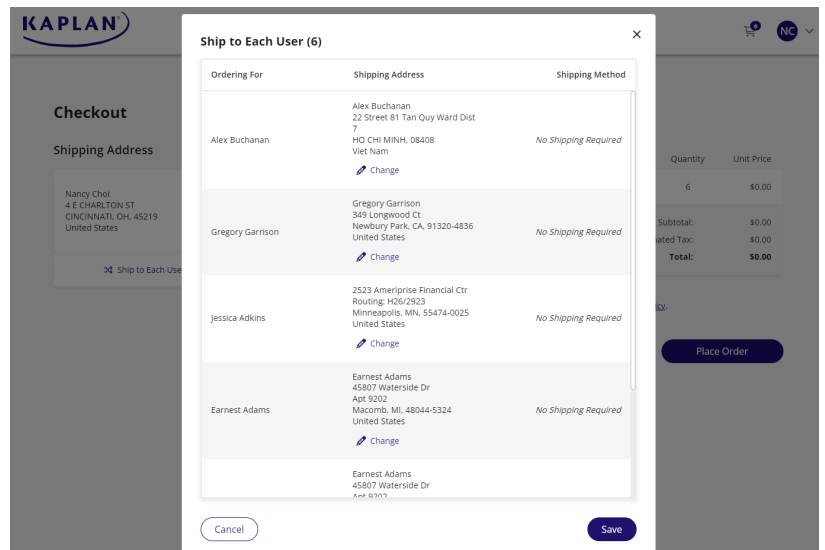


Checkout

After the cart summary page, you will be taken to the Checkout page where you can choose shipping options. You can choose **Ship to Each User** where each package ships individually to the users selected during checkout, or you can ship the entire order to one address if preferred.

Order Completion

After placing the order, you will receive a confirmation email and receipt including all order details. Additionally, students will receive an email with online access instructions for their resources.



Students will be able to launch their program immediately after signing in, from the **My Learning** page of their account.

Kaplan Support

Customer Engagement Team

Your Customer Engagement Manager is the escalation point of contact for any issues that may not be resolved through Tech Support or Student Support, and is the point of contact for any reconfiguration requests for your Kaplan Portal.

Student or Technical Support

For program specific Student or Technical Support, please use the following contact information:

- Business & Financial Programs: 877-731-5061
- Real Estate: 800-636-9517
- Graduate Admissions: 1-800-KAP-TEST
- Nursing and Medical: 1-800-KAP-TEST

Student Support is available 8:00 am–7:00 pm ET, Monday–Thursday; 8:00 am–6:30 pm ET, Friday.

After-hours support is available by visiting [Contact Us](#). Requests will be responded to within 24 hours.

General System Requirements

Minimum requirements

1. Kaplan recommends the latest version of Google Chrome, Firefox, Safari, or Edge to use our site. The latest versions can be downloaded from the following links:
 - a. Chrome: <https://www.google.com/chrome/>
 - b. Firefox: <https://www.mozilla.org/en-US/firefox/browsers/>
 - c. Safari: <https://support.apple.com/downloads/safari>
 - d. Edge: <https://www.microsoft.com/en-us/edge/download>
2. RAM: 8GB or higher
3. Broadband Connection: 10 Mbps or higher
4. Adobe Reader: 9.0+
5. Cookies and JavaScript must be enabled
6. Disable the pop-up blocker
7. Screen Resolution: 1920×1080, 1536×864, 1366×768 ,1180×820, 1024x768, 768x1024

Mac

Platform: Mac OS X 10.15 or higher with the latest updates installed

Processor: 1.83MHz Intel Core Duo or faster

PC

Platform: Windows 10 or higher with the latest updates installed

Processor: Core i3 or faster