

Training Launch Checklist

This checklist guides training administrators through the steps to successfully launch United Educators (UE) courses in the UE Learning Portal. The steps are listed in the suggested order of completion.

Submit a request if you don't have training admin permissions or need to request access for someone on your team.

☐ Define Your Training Needs

- Consider the appropriate training audience.
- Determine which training topics would be most useful for them.
- Identify whether you have multiple audiences with different training needs.

☐ Choose Your Courses

- **Review the UE course catalog.** Courses can be previewed with a valid UE.org login.
- UE members have access to the full catalog at no additional cost and aren't limited on the number of courses that can be used.

☐ Schedule a Pre-Launch Check-In With the UE Implementation Team to Walk Through Next Steps Together (Optional)

- Interested in working with the UE implementation team to assist with next steps? **Click here to schedule time with our team.**
- Schedule Pre-Launch Check-Ins at any time prior to the launch.

☐ Configure Additional Learning Portal features (Optional)

- Opt-in notifications to learners and/or admins
- Selecting your preferred learner homepage user interface
- Automated groups
- Automated enrollments
- Secure File Transfer Protocol (SFTP) for recurring user upload or report delivery
- Contact **launch@ue.org** or your implementation specialist to configure these additional learning portal features.

☐ Choose How to Enroll Learners in Courses

- Learners can be enrolled directly into a course or through a learning plan. Both options enroll learners in selected courses, but each option offers different features.
- Need help deciding? **Check out our reference tool.**

☐ Review the IT Tip Sheet With Your IT Team

- [Click here](#) to review the IT tip sheet, including whitelisting information.
 - Action Item: Ask IT to whitelist the learning portal domain and email addresses to ensure proper access and email delivery.
- The UE Learning Portal offers automated emails like learner reminders. View the IT tip sheet to see available options. To enable notifications, email launch@ue.org.

☐ Determine Registration for Learner Accounts

- Determine how learner accounts will be created:
 - Self-Registration — Learners create their own accounts through a link and branch code.
 - Bulk Upload — Admins use a spreadsheet to import learner accounts into the portal.
 - SFTP — Set up reoccurring bulk upload imports.
 - Manual Creation — Training admins create individual accounts one by one.

☐ Archive Past Completion Records (If Re-Training)

- Enable re-training by archiving learners' prior completion records and re-enrolling them in the course.
- Learners won't receive a new completion record unless their prior completion is archived before re-enrollment.
- [View our step-by-step guide](#) or [video tutorial](#) for help archiving, or [submit a request for processing to UE](#).

☐ Register Learner Accounts

- Locate your branch code for registration (located on your Admin Menu when logged into the Learning Portal).
- For bulk upload, [fill in this spreadsheet](#). Once completed, process the import as yourself or [submit to the UE team](#) for processing.
- If you're interested in setting up reoccurring bulk uploads, [click here](#) for the next steps for SFTP.
- If you're manually creating individual accounts, [follow the steps in this guide](#).
- If learners will self-register, [use this guide](#) to identify the link to enroll them in the correct course(s).

☐ Write and Distribute Your Training Announcement

- For bulk upload or manual creation, [use this sample language to help craft your personalized announcement](#). Feel free to include training details, institutional contacts, and any additional information you want to share with learners.
 - Please note, the UE Learning Portal can send out a welcome notification to new learners through bulk upload or manual creation, but this notification can't be customized. This can be enabled by the training admin at the time of account creation.
- For self-registration, [use this sample language to help craft your announcement](#).
 - Please include the self-registration link and your institution's branch ID code in the announcement to allow learners to register.

☐ Launch Your Training

- Send out the announcement to learners to access their accounts and begin training.

☐ Direct Your Learners to Support

- Learners can get help by clicking any [Support Portal link](#) on the learning portal or by calling the Help Desk at **(877) 209-2236**.
- Training admins can email launch@ue.org for administrator assistance.

☐ Measure Your Initiative with Reports and Data Visualizations

- The learning portal allows training admins and managers to track learner completion data within the system. For more information, review our guides on [running completion reports](#), [creating custom reports](#), and [LMS insights dashboard](#).
- You can schedule custom reports for email delivery.