

Review and Request Access to BoldU

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Purpose

BoldU is the learning system customers access for product learning content and information. For new implementation projects, a customer Learning Manager will be set up as the primary resource to access their learners' progress and manage their courses.

For existing customers, a review that a Learning Manager has been created is all that is required.

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Review Customer Learning Manager

To confirm if a customer already has a Learning Manager set up:

1. Open the customer's account card
2. Scroll to the 'Customer Information' section
3. Review the 'Learning Manager' field
 - a. If a contact name exists, they have been set up already
 - i. Copy the Learning Manager's name and place it in the project task Chatter and complete the task
 - b. If a contact name does not exist, or the one on record is no longer with the company, Follow the steps for Requesting a Learning Manager setup below

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Set Up a New Learning Manager

If no Learning Manager is identified under the customer account card, or the resource listed is no longer with the company, request a new Learning Manager be set up.

1. Open the BoldU task within the project
2. Click on the 'Activity' section
3. Click in the Email box
4. To: BoldU@boldgroup.com
5. Select template: 'BoldUAccess'
6. Fill in the section in red
 - a. Remove products unrelated to the project
 - b. Level = 1
7. Send the email
8. If an error is received – remove the country line from the email
 - a. If the customer is outside the US manually add the country information
9. The BoldU resources will create the new Learning Manager and inform them
10. The task can be completed

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