



LMS ADMINISTRATION

Administrator Guide

Add users, set up groups, assign training, and track certificates, reports, and emails in Coggno.

IN THIS GUIDE

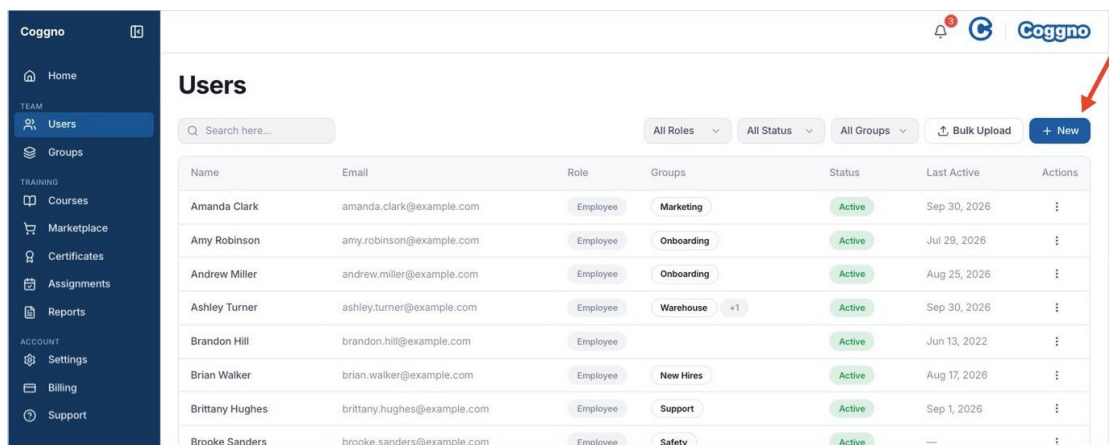
- 1 Add users to your account
- 2 Set up groups
- 3 Assign courses
- 4 Certificates
- 5 External certificates
- 6 Reporting
- 7 Email notifications

Before you start. You need an Admin role to use the features in this guide.

1 Add users to your account

Invite people and set their role and group in one step.

1. Go to **Users** and click **New**.
2. Enter one or more email addresses, separated by commas.
3. Select a role: **Employee** (learner) or **Admin** (manages the account).
4. Optional: select a **group** to give them its courses right away.
5. Click **Invite User**.



Click New to invite users.

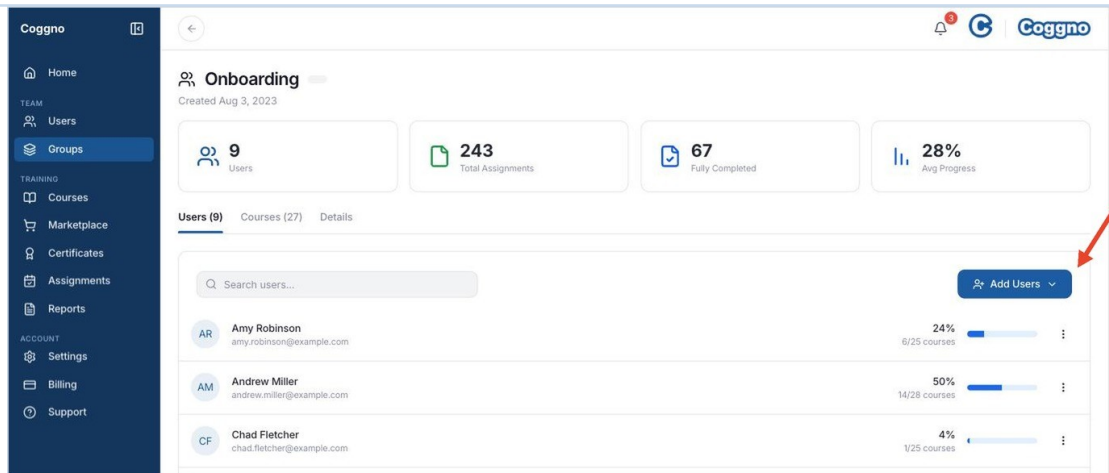
New users show as **Invited** until they accept.

Adding a whole team? Click **Bulk Upload** and upload an .xlsx file. Only the Email column is required.

2 Set up groups

Assign training to many people at once.

1. Go to **Groups** and click **New**.
2. Enter a group name and click **Create Group**.
3. On the group page, click **Add Users** > **Add User**.
4. Select people (or **Select all**), then click **Add Users**.



Add Users is on the group's Users tab.

To invite someone new straight into the group, choose **Add Users > New User**.

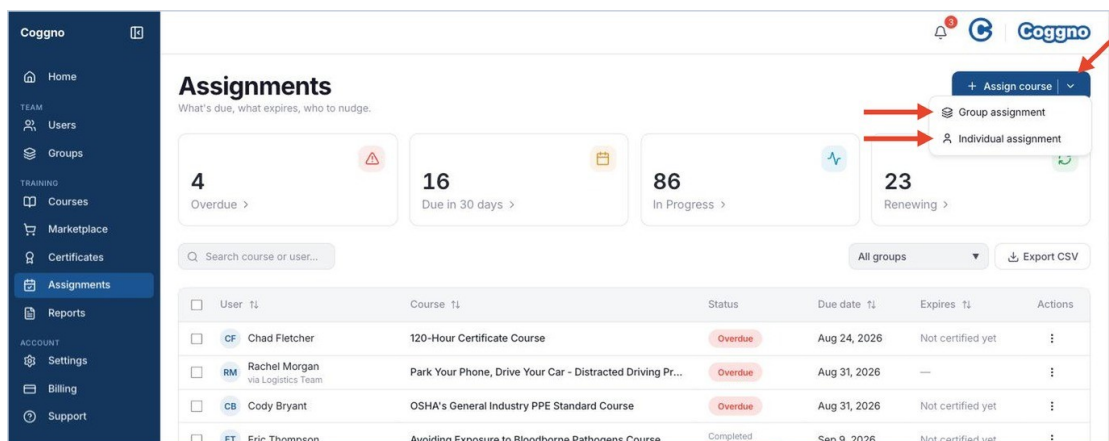
Good to know. People added to a group later get its courses automatically.

3 Assign courses

Assign to a group or one person, with a due date and renewal.

1. Go to **Assignments** and click **Assign course > Group assignment**.
2. Select the group and click **Next**.
3. Select the courses.
4. Set a due date: 30, 60, or 90 days, a custom date, or none.
5. Set the renewal: **Annually** (default) or **No renewal**.
6. Click **Assign Courses**.

For one person, choose **Individual assignment** instead.



The Assign course menu.

From the list, you can:

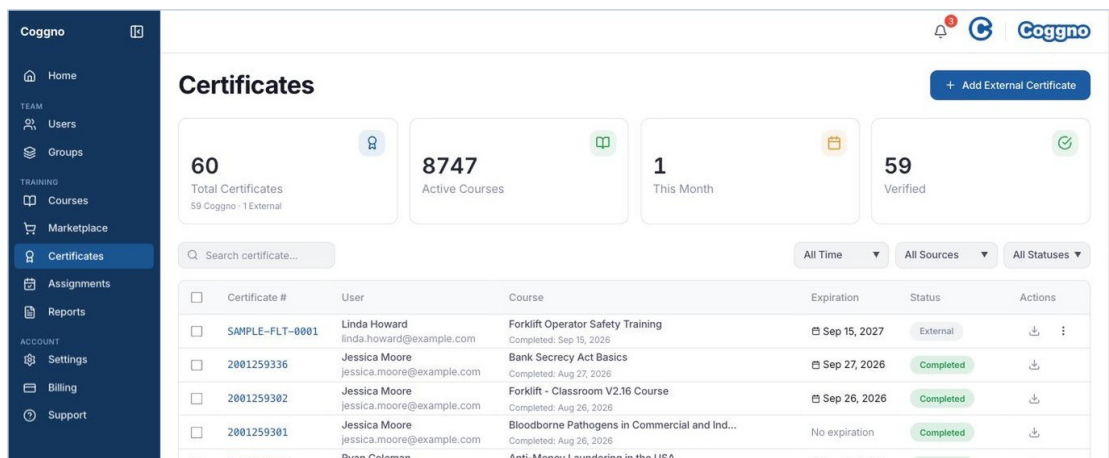
- Click a summary card, like **Overdue**, to filter the list.
- Use a row's  menu to edit the deadline, send a reminder, or mark the course complete.
- Select several rows to change their renewal at once.

Licenses. No license is used until the person opens the course.

4 Certificates

Every completion issues a certificate.

1. Go to **Certificates**.
2. Search by certificate number, learner, or course, or use the filters.
3. Click a certificate number to preview it.
4. Click the download icon to save it. To save several, check them and click **Download selected**.



Certificate #	User	Course	Expiration	Status	Actions
SAMPLE-FLT-0001	Linda Howard linda.howard@example.com	Forklift Operator Safety Training Completed: Sep 15, 2026	Sep 15, 2027	External	 
2001259336	Jessica Moore jessica.moore@example.com	Bank Secrecy Act Basics Completed: Aug 27, 2026	Sep 27, 2026	Completed	
2001259302	Jessica Moore jessica.moore@example.com	Forklift - Classroom V2.16 Course Completed: Aug 26, 2026	Sep 26, 2026	Completed	
2001259301	Jessica Moore jessica.moore@example.com	Bloodborne Pathogens in Commercial and Ind... Completed: Aug 26, 2026	No expiration	Completed	
	Ryan Coleman	Anti-Money Laundering in the USA			

Search and filters sit above the list.

Expiring certificates. They show as Due Soon, then Overdue, in the Compliance report.

5 External certificates

Keep certificates earned outside Coggno with the rest.

1. Go to **Certificates** and click **Add External Certificate**.
2. Select the user.
3. Upload the certificate: PDF, JPG, or PNG, up to 10 MB.
4. Enter the training name, completion date, and credential number. Add an expiration date if it has one.
5. Click **Add Certificate**.

Add External Certificate

Record training completed outside Coggno so every certificate lives in one place.

User *

LH

Linda Howard linda.howard@example.com

▼

Certificate file *

Sample_External_Certificate.pdf

Certificate / training name *

Forklift Operator Safety Training

Completion date *

2026-09-15

Expiration date

2027-09-15

Credential / certificate number *

SAMPLE-FLT-0001

Cancel

Add Certificate

Expiration date is the only optional field.

The certificate shows in the list as **External**. Use its  menu to edit or delete it.

Certificates

+ Add External Certificate

60
Total Certificates
59 Coggno · 1 External

8747
Active Courses

1
This Month

59
Verified

All Time ▼

All Sources ▼

All Statuses ▼

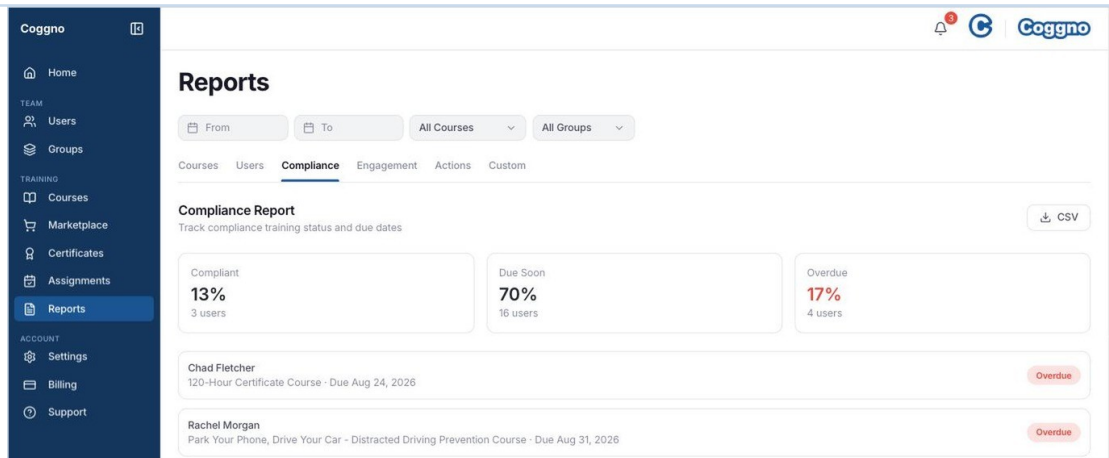
☐	Certificate #	User	Course	Expiration	Status	Actions
☐	SAMPLE-FLT-0001	Linda Howard linda.howard@example.com	Forklift Operator Safety Training Completed: Sep 15, 2026	Sep 15, 2027	External	 
☐	2001259336	Jessica Moore jessica.moore@example.com	Bank Secrecy Act Basics Completed: Aug 27, 2026	Sep 27, 2026	Completed	
☐	2001259302	Jessica Moore jessica.moore@example.com	Forklift - Classroom V2.16 Course Completed: Aug 26, 2026	Sep 26, 2026	Completed	
☐	2001259304	Jessica Moore	Bloodborne Pathogens in Commercial and Ind...		Completed	

An external certificate in the list.

6 Reporting

Export progress, completion, and compliance data.

1. Go to **Reports**.
2. Set the date range. Filter by course or group if needed.
3. Pick a tab: **Courses**, **Users**, or **Compliance**.
4. Click **CSV** to export.

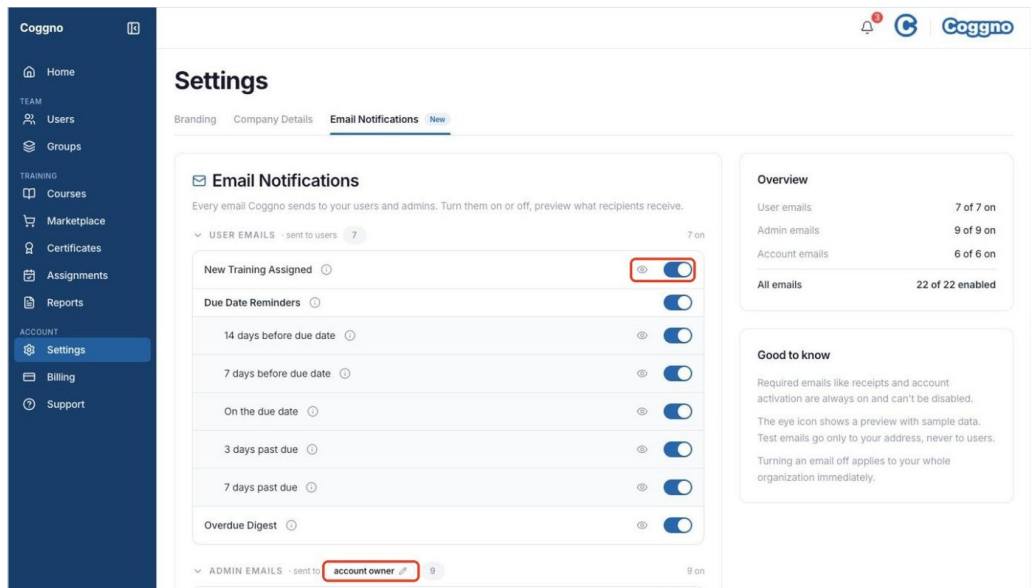


The Compliance report.

7 Email notifications

Choose which emails Cogno sends, and preview them.

1. Go to **Settings > Email Notifications**.
2. Use the toggles to turn emails on or off. Changes apply to everyone right away.
3. Click the eye icon to preview an email, or click **Send test to me**.



Every email has a preview and an on/off toggle.

- **Due Date Reminders** go out 14 and 7 days before, on the due date, and 3 and 7 days after. They stop once the training is complete.
- Emails marked **Required**, like receipts, can't be turned off.

Change who gets admin emails

1. Next to **Admin emails**, click **account owner**.
2. Enter the addresses for admin and completion notifications, separated by commas.
3. Click **Save**.

Choose who gets admin emails.

An email preview.

Contact support@coggnocloud.com