

Platform administration and company setup

For EUROLEARN_ADMIN users. Complete MFA before platform actions. Use the company guide as well when you hold an organization administrator membership.

Orient yourself

The platform workspace includes Course Studio, Audit history, Privacy requests, Companies and orders, Certificate management and Training support. Each action still checks its role and MFA requirements.

Before a change, verify the account, company, course/version or order reference. A familiar name is not enough when one person belongs to several companies.

Review a company request

1. Open Companies and orders > Company requests. Review the company name, registration number, country, billing address and VAT information.
2. Check the request with the applicant through your established business process. Confirm that a duplicate company account is not being created.
3. Choose the review decision and enter a clear reason. Approval creates the company and makes the requester its Primary Administrator.
4. Direct the requester to Team & training and the Organization administrator manual. Company access requires MFA. An academy is optional and is created separately only if they intend to operate training.

Record commercial arrangements

1. Use Record a long-term contract for an agreed company contract. Enter the reference, dates and explicit course prices and seat quantities. This workflow requires a term of at least two years.
2. Use Create a company order, select the organization and course, choose the contract price if applicable and enter the seat quantity.
3. Verify the resulting pending order before recording its invoice or confirming payment. Creating an order does not activate seats.

REMEMBER

Use negotiated contract and billing information supplied through your business process. Eurolearn does not invent tax treatment, contract terms or payment evidence.

Support organizations and academies

The academy is an optional training-provider workspace operated by an organization. It is not a replacement for ordinary company training administration.

Explain the two routes

An approved company can invite people, buy seats, assign courses, review training time and download reports without creating an academy.

An active company administrator with MFA can create a private academy in Academies. Current creation has no second platform approval step and does not automatically bill a subscription.

A company can accept another academy's client request and buy its training without owning an academy. The provider must configure the relevant licences and offers.

Route scoped support correctly

- Employee membership, company assignments and duty-time review: the responsible company administrator.
- Academy branding, staff permissions, client relationships, content and instructors: the academy administrator.
- Academy orders, invoice receipts, codes and certificates: the academy seller and authorized staff.
- Platform account incidents, deployment, sender verification and domain routing: the Eurolearn technical operator.

Check before enabling production use

Verify the academy's operating company, authorized certificate signatory, private/public visibility and customer contact details. Use the Academy administrator manual for a complete workflow rehearsal.

Academy invoices are issued through the seller's accounting process. Platform Stripe configuration does not automatically provide card checkout to each academy.

Coordinate legacy imports, live email and custom domains with the technical maintainer. Keep credentials and real learner records out of public examples and manuals.

REMEMBER

Global administrator status, organization membership and academy staff roles are separate. Use the intended scope and preserve existing learning and payment evidence.

Create a platform company order

Open Companies and orders > Create a company order. Follow the orange numbers on the screenshot.

The screenshot shows a web form titled "▼ Create a company order". It contains four input fields, each with an orange circle containing a number indicating the step order:

- Step 1:** "Company" label above a dropdown menu with the text "Choose company".
- Step 2:** "Course" label above a dropdown menu with the text "Choose course".
- Step 3:** "Contract price" label above a dropdown menu with the text "Catalogue price".
- Step 4:** "Seats" label above a text input field containing the number "1".

Actual application screen. All people, companies and training shown are fictional examples.

What to do

1. Select the purchasing company.
2. Select the course.
3. Choose an agreed contract price where applicable.
4. Enter the seat quantity, then review and create the order.

REMEMBER

This is the Eurolearn platform order workflow. Academy seller orders use the academy's Sales & codes workspace.

Invoices and payment activation

For Eurolearn platform orders. Invoice and bank transfer are the default; Stripe Checkout is optional. Academy sellers use the separate invoice workflow described in the Academy administrator manual.

Record and settle an invoice

1. Issue the invoice in the accounting system and send it to the customer. Check that its final payable total, including applicable tax, matches the Eurolearn order.
2. In the pending order's Payment and activation section, record the invoice number, issue/due dates and optional beneficiary, IBAN, BIC and transfer reference. Confirm the information before saving; invoice evidence is retained.
3. Allow optional online payment only after checking that final total. For an existing invoice, use Enable online payment and confirm the total. This records a separate approval.
4. For a bank transfer, verify the actual receipt outside Eurolearn. Enter its payment reference and exact amount, then choose Confirm payment and activate. Do not confirm from a customer's screenshot alone.

Handle online-payment status

An open or unknown Stripe checkout blocks manual bank confirmation and cancellation. Use Refresh payment status or Close checkout for bank transfer; proceed only after the provider confirms the outcome.

Payment needs review can mean funds were received but activation failed, for example because the course or company became inactive. Investigate the cause. After an appropriate repair, Retry paid access activation reuses the verified receipt; do not request another payment.

If Stripe reports a refund or dispute, reconcile the financial outcome and access decision separately. Historical learning is retained. Refunds are handled in Stripe, not by a Eurolearn refund button.

Check the result

A confirmed company order creates its course seat pool. A confirmed individual order creates course access. Check the order result and customer notification. Payment confirmation does not award course completion.

REMEMBER

Online checkout may be disabled until configured and tested. Test mode is restricted to demo courses; live mode rejects demo courses. Invoice PDFs, tax calculation and accounting synchronization are not generated here.

Review and publish training

Use the Course creator manual for editing and Excel question imports. This section covers the administrator's review and release responsibilities.

Review a submitted version

1. Open Course Studio and the submitted version. Check the intended audience, lessons, supporting material, question bank and answer explanations.
2. Check assessment limits and the topic blueprint, certificate template and unlock policy. Confirm that the learning design can satisfy its own assessment requirements.
3. Use Return for changes with specific notes when corrections are needed. Use Approve version only after the agreed review is complete.
4. Choose Publish version for an eligible approved version. Check the catalogue result. Publication does not purchase seats or automatically enroll a company.

Plan successor publication

An updated published course requires a successor draft and another review. Read the change summary and consider how the release affects learners already in progress.

The release policy determines whether eligible unfinished ordinary enrollments finish their original version or transfer to fresh progress. Transfer retains history and carries seats once. Programme components remain pinned; programme transfers are explicit. Check the intended policy before publication.

Respect release limits

Video drafts remain blocked pending verified Vimeo playback/completion integration. A saved video ID is not enough to approve video-based completion.

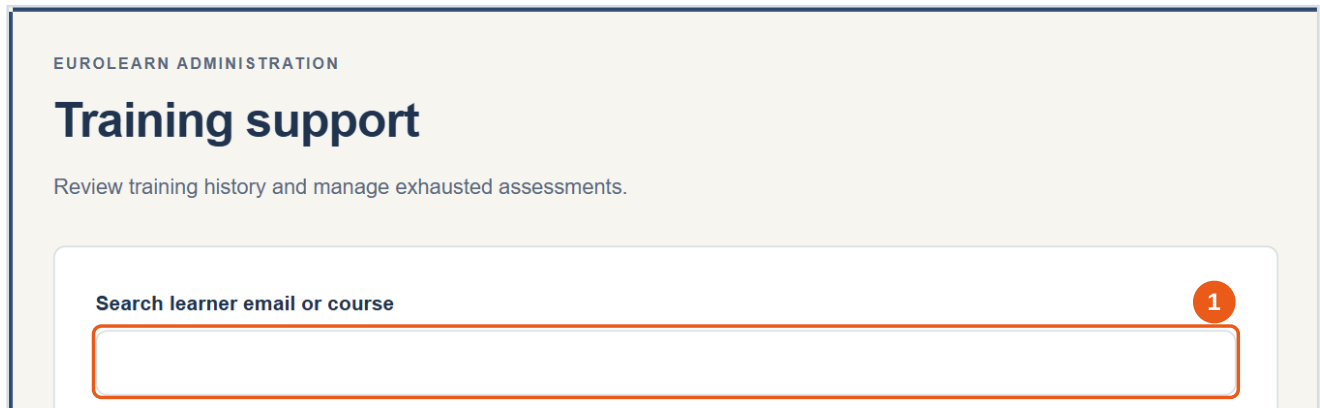
Check that non-demo courses use the approved certificate material and release configuration. Demonstration content must remain clearly identified and should not be presented as operational training evidence.

REMEMBER

Published course records cannot be casually edited. Use a successor to correct content and use the certificate correction workflow for certificate errors.

Find the correct support record

Open Training support after completing MFA. Follow the orange numbers on the screenshot.



EUROLEARN ADMINISTRATION

Training support

Review training history and manage exhausted assessments.

Search learner email or course

1

Actual application screen. All people, companies and training shown are fictional examples.

What to do

1. Search by learner email or course, then inspect the matching assignment and evidence before acting.

REMEMBER

Use a supported extra-attempt or correction workflow with a reason. Do not manufacture completion or delete historical evidence.

Training support and certificates

Support actions affect training evidence. Identify the correct learner and assignment, and keep a meaningful reason for each intervention.

Resolve assessment problems

1. Open Training support and locate the relevant learner/course record. Review its status, attempt history and available support details.
2. Check whether the issue is access, an unfinished attempt, exhausted attempts or a content problem. A browser report alone is not a reason to mark a course completed.
3. Where policy permits, grant an extra attempt using the support control and a recorded reason. Tell the learner how to continue using their existing assignment.
4. Escalate inconsistent state or a suspected service failure to the technical maintainer with the record reference and approximate time. Preserve existing evidence.

Manage certificates

1. Use Certificate management for platform artwork. Ordinary company and client-authority certificates use the company Head of Training; personal client-authority certificates leave that signatory blank. Academy-authority templates instead use the configured academy signer.
2. For a wrong certificate, verify the original and the correction request. Use the revoke/replace workflow with a reason rather than editing an issued PDF.
3. Check the replacement and its verification status. The original record and PDF remain retained with their historical link.

External recognition and reports

Use the available recognition workflow to review external training evidence. A recognition is separate from completing a Eurolearn course and does not silently become a new assessment result.

Use scoped company reports where you have the appropriate company membership. Platform status does not justify changing another company's training-time interval without the relevant company workflow and evidence.

REMEMBER

Do not reset learner accounts, delete attempts or overwrite evidence to resolve a support request. Report the issue and use the supported correction or access workflow.

Trace an administrative action

Open Audit history. Follow the orange numbers on the screenshot.

EUROLEARN ADMINISTRATION

Audit history

Review recorded actions and their changes. Showing the latest 500 matching events.

action	1	Record ID	2
from	3	to	4
dd/mm/yyyy		dd/mm/yyyy	

Actual application screen. All people, companies and training shown are fictional examples.

What to do

1. Filter by action when you know the operation being investigated.
2. Use the affected record identifier to narrow the results.
3. Set the start of the relevant period.
4. Set the end of that period, then inspect matching events.

REMEMBER

Audit history is read-only. Keep the event and record references when handing over an unresolved case.

Audit, privacy and handover

Keep operational decisions understandable for the next administrator. Record what changed, why, and which verified evidence supported it.

Review audit history

1. Open Audit history and use its filters to locate the relevant action and actor.
2. Correlate the event with the company, course, order or certificate reference. Audit history is read-only; it is not a tool for rewriting a transaction.
3. For a discrepancy, preserve the event reference and escalate it to the responsible administrator or technical maintainer.

Handle privacy requests

Open Privacy requests and review the request through the organization's approved process. Operational identity/credential erasure and retained training evidence have different handling; do not promise automatic deletion of all historical records.

Check company membership termination and the supported decision requirements before taking an erasure action. Record the reason and coordinate any legal retention decision outside the application.

Handover unresolved work

- Pending company requests and invoices awaiting verified payment.
- Payments received but waiting for access review, plus refunds/disputes needing an operational decision.
- Submitted course versions, requested changes and planned successor releases.
- Certificate correction and learner-support cases, including the exact affected references.
- Privacy requests and service incidents with their current owner and next action.

Protect privileged access

Use your own account, complete MFA and log out on shared devices. Keep API keys, payment credentials and recovery codes out of case notes, PDFs and email. Ask the technical maintainer to handle deployment secrets through the approved secret store.

REMEMBER

This is an application-user guide. Deployment, backups, key configuration and database recovery belong to the technical operations runbooks maintained with the project.