

PRACTICE. UNDERSTAND. REVISIT.

Learning Copilot

The role-by-role user and team guide

Admins · Faculty · Learners · Parents · QA · Sales · Support

Teach the workflow. Explain the limits. Verify the release.

PDF, Word and PowerPoint imports, OCR, private S3 content, reviewed practice, role-aware progress, revision and controlled adult AI.

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Use this guide

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1. What customers are buying into

Learning Copilot is a teacher-led practice loop inside Edumatica. Staff prepare and review objective practice; learners attempt, use hints, read explanations and revisit appropriate practice. Authorized staff inspect the evidence and explicitly publish a family summary where appropriate.

Live AI is a separate, optional adult route. It helps eligible adults understand approved text and helps authorized staff prepare private drafts. It does not publish a lesson, alter marks, award certificates, change fees or promote a student.

Use this customer explanation: "Your teachers remain responsible for the material and the answer key. Copilot makes practice, revision and the next learning conversation easier to organize. Live AI, where approved, is bounded and grounded in supplied references."

Do not say that a learner has mastered a subject because they earned XP, that citations guarantee correctness, or that a model knows the whole institutional syllabus. Do not promise higher scores, automatic grading or a released mobile version without its actual store record.

2. Readiness and first access

The web workspace is /learning-copilot on the product or institution microsite, not the public marketing page with the same path. Sign in through the normal Edumatica role and institution selection. The API remains authoritative if a stale menu or saved link is visible.

Use Open Learning Copilot on the main dashboard or Learning Copilot in the profile menu after selecting the right institution/role. If navigation is stale, use <https://app.edumatica.io/learning-copilot> or /learning-copilot on your approved microsite after normal sign-in. An administrator can reach first-time setup before activation. Other roles require enabled practice; a saved URL does not bypass permissions.

Administrators select Enable approved practice for first rollout. Agree the learning-day time zone before enabling: the action uses the server-provided zone, Asia/Kolkata by default, and has no time-zone picker. Support must review a different zone before first configuration; it is locked afterwards. This only enables practice. AI separately requires provider configuration, institution policy and eligibility. An empty workspace is normal until material is published for the right learners.

Supported roles are institution owner, organization administrator, assigned organization faculty, student and parent. General platform BackOffice and unrelated external tutors do not acquire educational access merely by opening this URL.

3. The role map

- Institution owner or organization administrator: configure reviewed practice; prepare material; review reports and corrections; manage the separate adult AI policy and eligibility.
- Assigned organization faculty: prepare their authorized sources and packs, publish reviewed material, read authorized learner evidence and explicitly share suitable summaries. Same-tenant membership alone is not proof of student assignment.
- School student: use assigned reviewed packs, objective scoring, hints, explanations, revision, progress and preferences. No automatic live AI for a child.
- College student: use authorized course-context practice. College-family sharing is opt-in. Live help additionally requires verified adulthood and consent; college enrolment alone is insufficient.
- Parent: read an explicitly published summary for a currently linked learner. There is no unrestricted attempt or prompt feed and no parent live AI endpoint.

Account switching, revoked assignments, withdrawn references and changed parent relationships are rechecked by the server. Reloading must not recover data from a previous institution or role.

4. Administrator onboarding

1. Sign in as the institution owner or authorized organization administrator. Open Learning Copilot and confirm the selected institution.
2. Agree one subject/cohort and the learning-day time zone with implementation. Select Enable approved practice; do not look for a time-zone picker or disable/re-enable as a routine fix.
3. Confirm staff assignment and active student records in the existing ERP. Resolve absent context rather than selecting an unrelated learner to make a demo work.
4. Have staff prepare one rights-cleared reference and a small reviewed pack. Use a fictional learner for training and QA, not a customer record.
5. Walk through learner scoring and staff progress. Explain that practice evidence is separate from official academic results.
6. Test parent visibility using explicit publication, and college-family visibility using the learner's opt-in.
7. Review reports, correction authority and withdrawal before expanding the cohort. Qualify adult AI separately if needed.

Turning practice off does not delete practice receipts, earned evidence or provider cost. It must not disrupt the customer's existing courses, assignments, results or financial records.

5. Prepare a source library

Open Library as currently assigned faculty or an authorized institution manager. Import a PDF, Word DOCX or PowerPoint PPTX, or paste a short passage. Both paths create staff-reviewable references, not an automatically published lesson or generated practice pack.

Document path - exact controls and expected results:

1. Select Upload a document. Under Document file (20 MB maximum), choose PDF, DOCX or PPTX. Old .doc/.ppt, macro-enabled formats and standalone image uploads are unsupported. Use an authorized copy in a supported format.
2. Check Document title and Document subject. The filename can supply the initial title; make it useful for later reference selection.
3. Choose Document learners. Use Load more document learners for later results. Faculty must currently be assigned to the audience.
4. Set Scan reading to Automatic OCR when needed. Use OCR every PDF page for mixed/image-heavy PDFs where embedded text is incomplete. Supported embedded Office images use OCR too.
5. Set OCR language to English or English and Hindi to match the material. OCR reads text; it does not translate it.
6. Confirm I own this document or have permission to use it for these learners. Keep unnecessary personal data, confidential records and exam keys out of teaching references.
7. Select Upload and extract. Percentage is file-transfer progress, not completed OCR. Originals and extraction artifacts are stored privately in S3. This stage spends no LLM tokens, though server CPU and S3 have infrastructure costs.
8. Status can be Receiving file, Waiting to read, Reading document, Ready for your review or Needs attention. You can leave and return; use Refresh imports. Do not repeatedly upload because background reading is still running.
9. When ready, read warnings and open each useful Review part. Pages/slides and long passages may become separate drafts. Ready means extracted, not published. Leave irrelevant or inaccurate parts unpublished.
10. Use Download original as authorized staff to compare the file with Review reference text. Links expire after 60 seconds; request another in the product if necessary. Never share signed links in tickets or with learners.
11. Check spelling, punctuation, numbers, equations, reading order, table relationships and missing text. Edit errors and choose Save source corrections. Unsaved changes cannot be published. A stale-revision conflict requires refresh and deliberate reconciliation.
12. Compare the current saved text, then tick I compared this extracted text with the original and checked OCR accuracy. Editing/new revisions reset this acknowledgement. Select I reviewed this source -

publish only after checking the current part and audience.

13. Repeat for every useful part. Check through a separate approved learner training login: only targeted published passages appear, never drafts, original files or upload controls. References can now be attached to manual practice or selected for authorized AI.

Practical limits and OCR tips:

- The maximum is 20 MiB (shown as 20 MB in the UI), with up to 50 PDF pages or PowerPoint slides and bounded extraction output. Every complex file is not guaranteed to parse. Split oversized teaching material into smaller authorized files.
- Clear, upright scans work better. Compare low-confidence or empty-page/image warnings against the original. Handwriting, diagrams and complex equations need human explanation/correction; OCR is not semantic understanding.
- Password-protected documents, macros and embedded active objects are unsupported. Remove protection only from material you are authorized to use.
- Word paragraphs/tables use document order; headers, footers and comments are not the teaching body. PowerPoint reading order needs review; speaker notes are not included and hidden slides are excluded.
- Unsupported Office images or chart labels may need an authorized PDF export and full-page OCR. Check the result; this is not an accuracy or antivirus guarantee.
- If Needs attention offers Retry extraction, use it for the retryable failure.
Unsupported/encrypted/oversized content needs a corrected permitted file instead. Preserve the document identifier for support.

Manual text path: select Add reference material. Enter Source title, Source subject and Reference passage (up to 12,000 characters). Select Authorised learners, confirm rights, then Save source for review. Read/correct the saved passage and explicitly select I reviewed this source - publish. Manual create is not automatically deduplicated: after a timeout, inspect the owned source list before creating another.

Neither path automatically indexes an entire S3 bucket or covers a complete syllabus. Withdrawal prevents new use, and reference access is rechecked after live AI returns.

An approved source has an identity, version and content hash. Guided help cites the actual supplied source and bounded text passage, not an arbitrary web page invented by the model. A citation still requires educational review.

If Library is empty for a learner, inspect publication, targeting, current relationship and the selected institution. Creating a source does not publish it automatically. A teacher must not reuse another faculty member's private draft merely because both belong to one institution.

6. Create and publish a reviewed practice pack

Open Practice packs as staff and select "Create practice pack". Choose a descriptive title, subject, learning goal and authorized learners. A pack contains 1 to 20 objective questions. Each has 2 to 4 distinct choices, one zero-based correct choice, a useful hint and an explanation.

The editor can select "Choose ERP learning context". Available context is derived from current section, course and staff assignment, including period labels. Use "Next context page" when there are more results. Select the real authorized context rather than entering invented course IDs.

Attach suitable published references. Save as a draft, then check every prompt, option, key, hint and explanation against the reference and learning goal. The explicit reviewed acknowledgement and publication action are required. The model never publishes a pack for you.

Published questions are not silently rewritten after attempts. Copy to a new draft when a new version is needed. Withdrawal prevents new access without erasing earlier evidence. A stale editor revision is a conflict: refresh and reconcile rather than overwriting another staff member's work.

QA should inspect the learner API payload as well as the screen. An undisclosed answer key must not arrive before the authorized answer workflow. Replay and concurrent requests must not award XP twice.

7. Learner practice and feedback

Students use Today, Practice, Library, Guided help, Progress and Settings where their role and setup permit them. Today brings assigned practice and revision into view. Open a pack, choose an option and submit a genuine attempt.

Hints are available when the learner needs guidance. Feedback explains the reviewed answer. Assisted evidence remains distinguishable from independent work. A lost response can be retried with the same stable operation ID; a reload should show persisted progress rather than resetting it.

The first eligible independent correct item earns 10 XP; assisted evidence can earn 4 XP. Eligible completion contributes 15 XP. The server enforces a 200 XP daily ceiling and prevents repeat/copied-item farming. These are the current practice rules, not an exam-mark formula or a future subscription currency.

Repeated guesses, duplicated questions or a changed device must not manufacture independent evidence. Staff should interpret the history and the learning context rather than using XP as a high-stakes ranking.

8. Revision and sustainable gamification

The implemented revision loop uses 1, 3, 7 and 14 day intervals, reviewed objective items and context-separated evidence. Historical-day fixtures prove scheduling mechanics, not a real two-week educational pilot or learning-outcome improvement.

Revision can search a bounded reviewed bank. When a search is still in progress, use the provided Continue action. Restart begins the current search again without pretending that an older draft is current. Staff withdrawal, source availability and current assignment still apply to revision items.

Reminder pages can contain unavailable historical origins; later live reminders remain reachable using Next. An empty page is not proof that all reminders have ended. Do not discard historical records to make the list look complete.

Learners can choose rest weekdays, add suitable calendar pauses, postpone eligible revision, switch gamification off and use reduced motion. Explain the progress signals without shame, compulsory streak pressure or public leaderboards.

9. Staff evidence and corrections

Staff can inspect authorized learner progress for the pack and topic/context. Independent, assisted and repeated work have different meaning. A delayed reviewed item provides stronger evidence than repeating a just-seen question, but is still not an official grade.

Learners can report a learning issue. Staff reviews use current revisions and bounded scoped queues. Concurrent edits must return a conflict rather than falsely reporting success.

Question corrections preserve receipts and audit history. Retired question identity is excluded from future evidence and rewards through the correction/reconciliation workflow. Do not delete attempts or edit customer financial or academic records to hide a defect.

A correction should document why the item was wrong, the corrected teaching content and what happened to earlier practice evidence. Support must preserve the relevant pack/request identifiers and timestamps without circulating private prompts or keys.

10. Parent and college-family sharing

Parent progress is an explicitly published snapshot, not automatically shared private practice. Staff publishes a suitable summary; the parent must still be actively linked to that learner when reading it.

For college learners, family sharing is opt-in. A guardian relation in an older imported record does not waive an adult learner's sharing preference. Revoking a link or withdrawing the published summary removes current access without erasing historical learner evidence.

QA must use two households and two institutions. A parent must not see another child by changing a URL, receive the learner's private AI request or continue seeing data after a relationship is revoked.

Sales should describe this as a teacher-led learning conversation: what was practised, what evidence was shared and what the next step is. It is not a parent surveillance feed.

11. Controlled adult AI

Live AI uses the configured backend provider for bounded source-backed guidance and private staff preparation. The key is backend-only, never in the browser/app, guide or console. Document extraction/OCR does not use this provider.

Where the LLM is used:

- Adult learner: Guided help -> choose 1-4 approved references -> enter what you want to understand and what you tried -> choose English/Hindi -> Get guided help. Read the explanation, next step, citations and possible uncertainty.
- Approved adult faculty/admin: AI preparation -> Preparation task: Lesson outline and guidance -> approved references and preparation question/prior outline -> Get guided help. Review the output; it is not an automatically saved lesson.
- Approved adult faculty/admin: Editable practice draft -> intended learners and approved references -> Generate private practice draft -> inspect preview -> Save as an editable draft -> correct the editor content -> explicitly review/publish. At most three questions are generated per draft.

Where the LLM is not used: upload, OCR, S3 storage, reference review/publication, objective Check my answer, stored Get a hint, XP/badges, revision scheduling and progress summaries. Uploading does not generate questions. Bounded relevant passages are sent, not an entire book or the customer database. A practice hint is stored teacher-reviewed material, not a new AI reply per click.

Eligibility requires all relevant conditions: practice enabled, current role/assignment, active institution policy, valid provider setup and unexpired spend approval. Students additionally require verified adult status and consent recorded by authorized staff. Staff use requires the institution's adult-staff approval. Parents are denied live AI.

The user submits a question and an attempted explanation against 1 to 4 suitable published sources. Current request bounds are 500 characters each for question and attempt, 4,000 reserved input tokens and 800 output tokens. Obvious email/phone personal data is rejected; this is not a complete personal-data detector. Do not include unnecessary personal information.

Responses show supplied-source citations and can report uncertainty. Unsupported citations, malformed output and unavailable evidence do not become trusted guidance. Read the source and validate the subject content. The service has no tools that change fees, official results, admissions or promotion.

For staff preparation, choose the AI preparation workflow and appropriate learners. A generated pack is a private preview with at most 3 questions. Saving it creates a private editable draft; review and publication remain separate human actions. Insufficient or conflicting references must not become a published lesson.

12. Costs, failure recovery and future paid plans

The initial shared cap is INR 2,000/month. The starting shared token allowance is USD 10/month: production is limited to USD 9.99 and USD 0.01 is reserved for local provider qualification. The conservative INR 150/USD planning ratio gives INR 1,500 estimated token allowance plus INR 500 headroom. Actual tax, FX and invoices need reconciliation; the estimate is not a bank-charge guarantee. Qualification cost is not discarded when the production environment is enabled.

The server reserves a maximum before dispatch, settles known billed usage and retains uncertain cost. A timeout may still be billable. No automatic paid retry, stronger-model escalation or wallet reset occurs after a restart/key change. Provider rates/policies must be reviewed before a model change; this guide is not a public price list.

The same global UTC-month budget is shared across institutions, users and provider keys. Institution monthly and user daily controls plus concurrency limits apply. Operator qualification costs must be included in the shared allowance, not hidden in a separate test budget. Own usage is separate from the private global operator report.

If a response is lost, use Check saved request for the same operation ID, not another generation. Pending means wait/check status; uncertain means possible cost stays held for reconciliation. Do not clear recovery state or create another identity to bypass it. After an ambiguous manual source/pack create/copy, inspect the owned list before recreating. Reviewed practice remains independent of new AI generation.

Student Plus and Faculty Plus are not shipped purchase products. Before selling credits, require verified idempotent payments, refunds/restores, tax/store review, entitlement expiry and clear allowances. XP and provider cost wallets are not customer purchase credits.

13. Privacy, records and support

The provider request uses `store:false`, which is not a zero-data-retention agreement. Retention, consent, applicable law and provider eligibility need review before sensitive or minor-facing live use. Do not equate an API key or a college account with privacy clearance.

Learners can inspect the implemented own-data export. Export scope remains restricted to the correct identity and institution, and must not expose other learners, staff private keys or private global spend. Staff can review scoped learning reports; this is not an unrestricted audit of all institutions.

Support should ask for the institution, role, approximate UTC/local time, operation/request ID and a screenshot with private data hidden. Never ask for a password or provider key. Check active assignment, source/pack publication, tenant setting and current revision first.

Existing marks, certificates, fees, payments, admissions and promotion remain separate ERP records. Copilot launch and rollback must preserve them and all newly created practice/cost receipts. Code rollback is not permission to restore an old database over current user writes.

14. Common support situations

- No menu entry: check Open Learning Copilot on the dashboard or Learning Copilot in the profile menu with the right role/institution. The protected direct route can diagnose navigation, but grants no extra authority.
- Upload complete but still reading: transfer and extraction are separate. Use Refresh imports rather than repeatedly uploading.
- Ready upload but empty learner Library: extraction created staff drafts. Compare/correct and explicitly publish the chosen parts for the right audience.
- Source publication disabled: save corrections, compare the current revision and tick the document review acknowledgement. Refresh/reconcile a revision conflict, never force it.
- Inaccurate OCR: check every part against the original and correct it. An authorized PDF export can help with unsupported Office images/charts; handwritten/complex formulas still need human review.
- Failed extraction: read the explanation and use Retry extraction only if offered. Unsupported/encrypted/oversized files need a valid permitted copy.
- Original download expired: get a fresh Download original link in the staff UI. Never make S3 public or post the signed link to tickets/analytics.
- Empty Practice or Library: check target learners, current assignment, published status, source availability and context. A saved draft is not a published pack.
- Stale revision: another edit or publication occurred. Refresh, compare and deliberately reconcile. Do not force overwrite.
- AI not enabled or adult approval missing: reviewed practice can continue. An administrator must verify the missing policy or eligibility; support must not mark every student adult.
- Allowance/concurrency exhausted: inspect current reservations and policy. Wait for actual completion or allowance review. Do not reset wallets or create new identities to bypass the limit.
- Unsupported AI response: the returned structure, citations or finish state failed validation. Known provider cost can still be recorded. Preserve evidence and use reviewed material; do not present an invalid response as educationally verified.
- Source withdrawn or request unavailable: current access changed. Refresh Library and respect withdrawal. Cached text or an old ID does not restore authority.
- Parent summary unavailable: verify current linkage, explicit staff publication and college sharing preference. Do not expose private attempts to solve a support request.
- Revision page empty with Next: unavailable historical origins may occupy a bounded page. Continue to later pages; do not equate an empty page with end of history.

15. A 12-minute sales walkthrough

Minutes 0-2: ask for one subject, staff responsibilities and the learning concern. Explain reviewed practice versus separately approved adult AI. Use fictional records and a rights-cleared file/passage. Prepare a ready scan import before the timed demo; do not imply instant OCR.

Minutes 2-5: switch to staff, show Upload a document, the ready OCR result, original comparison and deliberate reference publication. Open a prepared small pack, check its context, key/hint/explanation and publish. Explain that upload neither creates a pack nor spends LLM tokens.

Minutes 5-8: switch to the assigned learner. Attempt independently, then use a hint on another item. Show the difference in evidence and explain that XP does not change marks. Show preferences and revision access.

Minutes 8-10: switch to staff. Inspect scoped evidence and publish a suitable family summary. Switch to the parent to demonstrate exactly what is shared and what remains private.

Minutes 10-12: discuss setup, support, content rights and language/region fit. Demonstrate controlled adult AI only using a verified approved adult training account with a bounded allowance. End with a documented pilot scope, not a promise of unlimited AI or guaranteed outcomes.

16. QA acceptance checklist

Use disposable, labelled fixture identities and real MongoDB transactions locally. Never change a customer password, send customer messages, charge a live payment or mark a real learner adult just to make a case pass. Repeat browser cases at desktop, tablet, mobile and narrow widths.

1. Owner reaches disabled-feature setup; unsupported roles are denied before data access.
2. Owner enables reviewed practice; existing ERP records and billing remain unchanged.
3. Assigned faculty sees authorized learners; unassigned/cross-tenant accounts cannot read them.
4. Rights acknowledgement, text length and published-source targeting are enforced.
5. Context pagination reaches later section/course results and rechecks current staff assignment.
6. Pack validation rejects duplicate targets/options, invalid keys and oversized question sets.
7. Private drafts and answer keys do not leak to learners before the authorized workflow.
8. Explicit review/publication works; concurrent stale publication/edit is rejected.
9. Independent attempt, hint-assisted attempt and explanation have correct evidence and XP.
10. Duplicate/replayed/concurrent answers award once; copied/reordered items cannot farm XP.
11. Daily cap follows institution time zone, including day boundaries.
12. Withdrawal during an in-flight attempt cannot commit a new progress/award receipt.
13. Revision honors reviewed evidence, rest days, holidays and current context.
14. Continue, Restart and later reminder pages survive unavailable historical origins.
15. Staff corrections preserve history and reconcile retired-item evidence and XP.
16. Parent access requires current relationship and explicit publication; college sharing requires opt-in.
17. Role/institution switch clears UI data; reload and revoked access do not recover another identity's data.
18. Own export and reports are scoped and contain no other-tenant data or credentials.
19. AI is denied for parents, missing adult consent, expired approval and absent provider setup.
20. Stable AI ID replays do not dispatch twice; changed content under the same ID is rejected.
21. Unknown citations, malformed/truncated response and source revocation fail safely.
22. Private AI draft import is scoped/idempotent and never automatically publishes.
23. Monthly/daily reservations and concurrency limits work across racing requests and restarts.

24. Uncertain costs remain held until trusted reconciliation; maintenance repeat/resume does not release them blindly.
25. Real provider qualification uses only approved synthetic references and counts actual costs.
26. Query plans use bounded indexes; performance includes realistic unrelated fixture cardinality.
27. Keyboard focus, contrast, reduced motion, touch target and narrow-screen overflow checks pass.
28. Production source/bundle/secret/backup preflight, additive indexes and data-preserving rollback are verified.
29. Native offline/process-death recovery, signed device artifacts and new store code are qualified independently.
30. Website, PDF, app store and sales claims match the actual current release status and deferred scope.
31. Digital/scanned PDF, DOCX/PPTX, OCR modes/languages, rights/audience and the exact 20 MiB/oversize boundaries work without automatic publication.
32. Saved queued/processing/ready/failure states, refresh and retry survive interrupted extraction without duplicate source parts.
33. Corrections reset comparison acknowledgement; current-revision publication works and learner/parent original access, drafts and cross-tenant imports remain denied.
34. Office images, tables, slide order and low-confidence/empty warnings are compared with the original, not assumed accurate.
35. Private S3 artifacts and short-lived staff original download work without browser keys, a public bucket or logged signed URLs.

17. Rollout, release and deferred scope

Local checks, real provider qualification, full application integration, production acceptance and mobile publication are separate evidence sets. A passing focused browser harness is not proof that every ERP page or signed Android device works.

Use an additive production release: preserve the currently serving ERP source, secrets, current customer writes and original rollback artifacts. Prepare Copilot indexes without dropping ERP indexes. Verify the latest read-back-tested database backup before activation. Do not restore a snapshot to install a feature.

After activation, use disposable same-tenant role fixtures for protected route checks, pack/source lifecycle, persisted scoring, parent publication and narrowly bounded provider use. Check unauthorized responses, service restart counts and current query plans. Preserve cost receipts even when disposable educational fixtures are retired.

PDF/DOCX/PPTX ingestion, bounded OCR and private S3 are deployed on web/shared API. This is not comprehensive semantic understanding, handwriting/diagram/formula accuracy or full curriculum coverage. Deferred work includes fully reviewed curriculum taxonomy, child live-AI qualification, assessed-work integration, voice, paid entitlements and verified outcomes. Native document controls/Copilot shipping are separately pending; an existing app does not prove the update is published.

Before a sales handoff, record the serving web/API release, app version if applicable, enabled institution, subject, allowed roles, source rights, adult-AI scope and open questions. Keep pass, fail and pending explicit.

18. Reference and ownership

Public explanation: <https://edumatica.io/learning-copilot/> . Complete illustrated user/setup guide:

<https://edumatica.io/learning-copilot/setup-guide/> . Downloadable PDF:

<https://edumatica.io/learning-copilot-user-guide.pdf> . Product workspace:

<https://app.edumatica.io/learning-copilot> . Microsites use normal institution login.

Your institution owns teaching accuracy, audience selection, adulthood/consent approval and escalation. Ask the operations owner for the actual release/acceptance record rather than assuming a menu, PDF or API key proves all roles/apps are enabled. Provider policy must be reviewed before sensitive or minor-facing live use.

Prepared from Edumatica's implemented contracts and automated evidence, with AI assistance. Educational content requires institution review. This guide does not invent customer results, an author credential or a provider compliance certification.

19. Owner / institution administrator - daily quickstart

Set up a useful first learning cycle.

Start here: Open Learning Copilot from the main dashboard or profile menu after selecting the correct institution. Use Settings for institution controls.

1. Complete normal institution onboarding first. Check active learners, assigned faculty, section/course context and parent links. Reuse existing accounts; do not create a duplicate institution.
2. Choose Enable approved practice. Confirm the learning-day time zone with your implementation team before first enablement; the web action has no time-zone picker.
3. Agree one subject, one cohort and one responsible reviewer. Ask assigned staff to upload a rights-cleared document or add reference material, then review and publish suitable parts.
4. Check a published practice pack through a separate approved learner training login. Test an independent answer, a hint, reload and learner-visible references.
5. Use Review learner progress and Learning reports to plan teaching and resolve concerns. Publish a parent summary deliberately; College sharing also needs learner opt-in.
6. If adult AI is wanted, configure AI policy and spending separately. Approve adult staff use and verify adult learner consent; enabling practice alone never enables AI for everyone.

Successful outcome: A small assigned cohort has reviewed material, a published pack and a clear support owner. Existing ERP marks, fees and attendance are unchanged.

Keep this clear: Do not mark school children as adults, change institution classification to unlock access, or treat a cost ceiling as a customer subscription.

20. Teacher / assigned faculty - daily quickstart

Turn teaching material into reviewed practice.

Start here: Choose the assigned institution/faculty role. Open Learning Copilot -> Library, then Practice packs.

1. In Library, choose Upload a document for PDF/DOCX/PPTX, or Add reference material for a short passage. Select only currently authorized learners and confirm content rights.
2. Wait for Ready for your review. Open every relevant Review part, compare with the original, fix errors, Save source corrections and explicitly publish the checked source.
3. In Practice packs, choose Create practice pack. Set title, subject, learning objective, learners and the real ERP learning context where available. Attach suitable published references.
4. Write 1-20 objective questions with 2-4 distinct choices, a correct answer, useful hint and explanation. Save draft for review, check each item and assignment, then publish.
5. If your institution permits adult AI, open AI preparation. Select approved references; choose Lesson outline and guidance or Editable practice draft. AI drafts need the same correction and publication review as manual drafts.
6. Review learner progress and topic evidence. Discuss independent versus assisted attempts, respond to concerns and use a new reviewed version rather than silently changing published questions.

Successful outcome: Learners receive accurate, appropriately targeted practice; you have evidence for the next teaching conversation.

Keep this clear: A ready upload is not a published reference. An AI-generated key is not verified merely because it has a citation. Same-institution membership is not proof of faculty assignment.

21. School learner - daily quickstart

Attempt first. Understand. Revisit.

Start here: Use your normal learner login and selected school. Open Learning Copilot -> Today or Practice.

1. Open a teacher-published pack assigned to you. If there are no packs, ask your teacher to check publication and your current class assignment.
2. Read the question carefully, choose an answer and select Check my answer. Use Get a hint when you need guidance, then think through the answer yourself.
3. Read the explanation after success. Move through the pack; reload or return later to see saved progress rather than starting a duplicate attempt.
4. Open Library to read references your teacher has published for you. Upload controls, original documents and staff answer-key editors are not learner tools.
5. Use Today -> Revision planner. When due, choose Start fresh revision. If the search offers Continue revision search or Restart revision search, follow that control; use Next reminders for later pages.
6. In Settings, choose whether to Show learning points and rewards and Reduce motion. Use Report a learning concern for unclear material; it is sent to your institution when you consent to share it.

Successful outcome: You can explain what you practised and what you will try next. Optional XP is a practice signal, not an examination mark.

Keep this clear: Live AI chat for school-age minors is not enabled. Teacher-reviewed practice, stored hints, progress and revision work without it.

22. College learner - daily quickstart

Practise in the right course context.

Start here: Select your College learner role. Open Learning Copilot -> Practice, Today, Library or Guided help.

1. Open a published pack for your current course/section/academic period. General practice is labelled unmapped; it is not a claim of syllabus coverage.
2. Attempt independently, use a hint if needed and read the explanation. Compare independent and guided evidence in Progress; repeated answers do not create fresh rewards.
3. Read the assigned published Library references. You cannot access a faculty draft or another learner's material by changing a link.
4. If you are a verified consenting adult and the institution has enabled AI, open Guided help. Select 1-4 approved references, enter what you want to understand and what you tried, choose English or Hindi, then Get guided help.
5. Read the explanation, next step and source citations. Check the reference yourself; uncertainty means the evidence is insufficient. Never submit private data or use it to auto-complete assessed work.
6. In Settings, choose whether your linked parent may see teacher-published practice summaries. A parent link alone does not switch on College family sharing. Use revision, reset preferences, reports and own-data export as needed.

Successful outcome: You get contextual practice and, where authorized, bounded source-backed help without changing official marks or sharing private conversations.

Keep this clear: College enrolment is not proof of adulthood. If an AI request is pending, use Check saved request rather than generating and paying again.

23. Parent / guardian - daily quickstart

Make the next learning conversation useful.

Start here: Use your own linked parent login and institution selection. Open Learning Copilot and choose the linked learner.

1. Choose View teacher-published progress for the intended linked learner. A summary appears only after staff explicitly publish it.
2. Read the summary as a snapshot of reviewed practice. Discuss the next learning step with the learner or teacher, not an official grade or a public ranking.
3. For a College learner, ask the learner to decide on the sharing preference. Current parent linkage, staff publication and learner opt-in must all remain valid.
4. If no summary is available, ask support to check the current relationship and publication. Do not sign in as the learner or request their OTP to retrieve private activity.
5. Contact the institution through its established support channel for concerns. A parent account has no live AI chat, document-upload or private prompt feed.

Successful outcome: You see only the learning summary meant for you and know which teacher to contact for the next step.

Keep this clear: A parent account does not reveal every attempt, unpublished reference, original upload or staff answer key.

24. Operations / support / implementation - daily quickstart

Resolve the cause, not just the missing screen.

Start here: Use this guide to support an authorized institution user. Platform BackOffice access does not grant that institution's Copilot authority.

1. Record the selected institution and role, approximate time, resource/request identifier and a redacted screenshot. Never collect passwords, provider keys or private signed download URLs.
2. Check active records, faculty assignment and practice enablement before changing content. For learner visibility, confirm published source/pack status, exact audience and current context.
3. For document processing, use Refresh imports and the saved import state. Ready for your review means extraction finished, not publication. Retry extraction is only for a retryable failure.
4. For an expired Download original link, obtain a fresh authorized link from the product; do not make the S3 object public. For unreadable Office images or charts, export a permitted copy to PDF and review OCR.
5. For paid AI, check provider readiness, institution policy, adult eligibility/consent and Used/Held/Remaining. Check saved request preserves an unresolved request; do not clear holds or reset wallets.
6. Record a secure handover with actual role checks, support owner and unresolved items. Learning reports reach institution managers, not an automatic developer inbox. Use established escalation for safety or privacy incidents.

Successful outcome: The user can continue the appropriate workflow, and unresolved outcomes remain traceable without privacy or financial shortcuts.

Keep this clear: Do not impersonate a customer, restore an old database, broaden tenant access or claim a failed/blocked optional flow passed.

25. QA / acceptance team - daily quickstart

Test the hand-offs between real roles.

Start here: Use labelled disposable training accounts and fictional rights-cleared content. Never run acceptance as a real learner.

1. Check owner setup, assigned/unassigned faculty, school and adult College learners, and linked/unlinked parents across two institutions.
2. Import a digital PDF, scanned PDF, DOCX and PPTX; test both OCR choices, supported languages, the 20 MB boundary, failed extraction and Refresh imports. Do not publish until every chosen part is reviewed.
3. Save a correction, check the review acknowledgement resets, then publish. A learner sees the published passage but not original downloads, drafts, upload controls or another tenant's content.
4. Publish a reviewed pack; test answer, hint, reload, no duplicate reward, later revision pages and reports. Check desktop/mobile widths, keyboard navigation and reduced motion.
5. Check explicit parent summary publication and College opt-in. Qualify adult AI only with an approved bounded allowance and synthetic references; test saved-request recovery without another paid generation.
6. Record pass, fail and not-in-scope separately. Web acceptance is not native-device or Play Store acceptance; check the actual released app version before an app claim.

Successful outcome: The acceptance record proves the specific roles and transitions used, not a universal claim that every ERP flow has been tested.

Keep this clear: Do not change a customer password, send customer messages, create live charges or mark a minor adult to pass a test.

26. Sales / customer success / trainer - daily quickstart

Demonstrate a believable learning loop.

Start here: Use approved training accounts and one simple subject. Explain reviewed practice before optional AI.

1. Ask which subject, staff responsibilities and learner challenge the institution wants to improve. Agree one cohort and the content reviewer.
2. As faculty, upload a rights-cleared teaching file, show automatic OCR and the review stage, and publish only checked reference parts. Explain that upload is not an AI call.
3. Create and explicitly publish a small objective pack. Switch to a learner login; demonstrate an independent answer, a hint, persisted progress and optional rewards.
4. Switch back to staff to review evidence. Then show an explicitly published parent summary using a linked parent account; explain College opt-in.
5. Only if qualified for the training adult account, show AI preparation or Guided help with approved references. Show citations and the separate cost allowance, not a claim of unlimited AI.
6. Close with a documented pilot scope, onboarding owner and next check. Send this guide and the downloadable PDF rather than promising automatic marks, guaranteed outcomes, paid credits or an unreleased app.

Successful outcome: The buyer understands who does what, how the feature fits existing teaching and exactly what is available now.

Keep this clear: No invented testimonials, higher-score promises, universal curriculum coverage, automatic grading or claims that every child can chat with AI.