eLXsyr User Guide

Learning Assistant, Smart Job Aid & Knowledge Base Builder

A complete guide for new users

About This Guide

This guide covers the features that work together: Learning Assistant, Smart Job Aid, Prompt Builder and the Knowledge Base Builder. It also covers best practices for building a strong knowledge base and how to keep sensitive information safe when working with AI.

You do not need a technical background to use any of these features. Follow the steps in order and refer to the tips throughout the guide when you need extra guidance.

Feature	File Type	Best Used For
Learning Assistant	Zip (Storyline or Rise)	Course-embedded chatbot for eLearning
Smart Job Aid	PDF	Chatbot attached to a reference document
Prompt Builder	Built in the platform	Prompt used by AI-powered bots
Knowledge Base Builder	Built in the platform	Content library the bot draws answers from

Before You Start

- One credit is used each time you publish/build a bot.
- Always test your bot before publishing. **Credits are non-refundable**.
- If you plan to use AI Powered mode, have your API key ready.
- For Learning Assistant, use the same zip file you upload to your LMS.
- For Smart Job Aid, your file must be in PDF format. Convert it first if needed.
- Do not put confidential, personal, or sensitive information into the Knowledge Base. This content may appear in bot responses.

WARNING Content you add to the Knowledge Base will be used by the AI to answer learner questions. It may appear word-for-word in a bot response or depending on your prompt. Always review your content before uploading. See the Security section at the end of this guide for full guidance.

Part 1: Learning Assistant

The Learning Assistant lets you embed a chatbot inside a Storyline or Rise course. Learners can open the bot while taking the course and ask questions. The bot answers using the knowledge you provide.

Step 1: Open Learning Assistant

On the main dashboard, click Learning Assistant in the left menu. Then click the + New Learning Assistant button.

Step 2: Set Up Project Basics

1. Type a name for your project.
2. Select your file type — Storyline or Rise.
3. Add optional notes if needed.
4. Click Next.

Step 3: Upload Your Zip File

Upload the published Storyline zip file (The same one you would normally upload to your LMS.)

1. Drag and drop your zip file into the upload area, or click to browse.
2. Wait for the upload to complete.
3. Click Next.

Step 4: Choose Bot Intelligence

Option A: Keyword Matching

The bot looks for specific words in the learner's question and returns a preset response. No API key needed. If you choose this option, you will automatically skip to Step 6.

Option B: AI Powered

The bot uses natural language processing to understand questions even when learners do not use exact keywords. This produces more accurate responses. Continue to Step 5 if you choose this option.

Step 5: Configure the AI Powered Bot

1. Enter your API key, or select one you have saved.
2. Name the bot and select its role.
3. Customize the bot icon colors to match your branding if needed.
4. Set the prompt. Choose a template, use the Build Prompt guided builder, or paste in an existing prompt.
5. Write a welcome message — the first thing learners see when they open the bot.
6. Click Next.

Set Up the Knowledge Base

The bot only answers from content in the knowledge base. If the information is not here, it will not guess.

1. Select existing knowledge documents from the list.
2. Or click Create Knowledge Doc to build new content.
3. Click Next when done.

TIP The quality of your knowledge base directly affects how well the bot performs. See Part 3 for how to build one, and Part 4 for best practices.

Step 6: Test the Bot

1. Type a question a learner might ask.
2. Review the response for accuracy.
3. Test several different questions.
4. Go back and adjust the prompt or knowledge base if needed.

NOTE One credit is used when you build the bot. Test thoroughly before moving on. Credits are non-refundable.

Step 7: Insert Bot and Build Zip

1. Click Insert Bot and Build Zip.
2. Wait for the platform to finish packaging.
3. Download the zip file.
4. Upload it to your LMS.

Part 2: Smart Job Aid

Smart Job Aid lets you attach a chatbot to a PDF document. Learners open the document in your LMS and use the bot to ask questions about its content. It works well for SOPs, reference guides, checklists, and policy documents.

Step 1: Open Smart Job Aid

On the main dashboard, click Smart Job Aid in the left menu. Then click + New Smart Job Aid.

Step 2: Upload Your PDF

> **NOTE** Only PDF files are accepted. Convert your document to PDF before uploading if it is in another format.

1. Upload your PDF file.
2. Review the document preview.
3. Select Portrait or Landscape.
4. Click Next.

Step 3: Choose Bot Intelligence

This works the same as in Learning Assistant. Choose Keyword Matching or AI Powered. See Part 1, Step 4 for a full description.

If you choose Keyword Matching, skip to Step 5. If you choose AI Powered, continue to Step 4.

Step 4: Build the Knowledge Base with FAQs

For Smart Job Aids (AI-Powered), you build the bot's knowledge by entering frequently asked questions and their answers. The bot uses natural language processing to match a learner's question to the closest FAQ entry — so learners do not need to use exact words.

1. Type a question a learner might ask about the PDF.
2. Type the answer.
3. Repeat for all key questions.
4. Click Next.

TIP The more FAQs you add, the more accurate your bot will be. Cover the most common learner questions first, then add edge cases.

Step 5: Test the Bot

1. Type a sample question.
2. Check the response.
3. Test a range of different phrasings.
4. Update your FAQs if needed.

NOTE One credit is used when you build the bot. Test before publishing. Credits are not refunded.

Step 6: Publish

1. Click Publish.
2. Wait for the output to generate.
3. Download the zip file.
4. Upload it to your LMS.

Part 3: Prompt Builder

The Prompt Builder helps you write the instructions that tell your bot how to behave. Instead of writing a prompt from scratch, you fill in a guided form and the tool generates a complete, ready-to-use prompt for you.

It is structured around the SCTFC framework — Role, Context, Task, Format, and Constraints. Each section of the form maps to one part of that framework. When you click Build Prompt at the bottom of the page, the tool combines all your inputs into a single prompt that gets applied to your bot.

> **TIP** You do not need to know how to write AI prompts to use this tool. Fill in what you know and the builder handles the rest. The more detail you provide, the better your bot will perform.

How to Access the Prompt Builder

- From the left menu, click Prompts, then + New Prompt Template.
- From within the Learning Assistant or Smart Job Aid wizard — when you reach the prompt setup step, click Build Prompt.

Page Layout

The page is divided into two sections:

- Template Details — at the top of the page. This is where you name your template and view the final generated prompt.
- Prompt Builder — below Template Details. This is the guided form you fill in. It is divided into five sections following the SCTFC framework.

The Final Prompt field stays empty until you click the Build Prompt button at the bottom of the page. Once generated, you can edit it directly before saving.

Step 1: Fill In Template Details

> * Required field — the builder will not generate a prompt if this is left blank.

Field	What to Enter
Template Name *	A short, descriptive name for this prompt. This is what you will see in your Prompts library. Example: Customer Support Coach or Compliance Training Assistant.
Final Prompt	Read-only. This field populates automatically after you click Build Prompt. You can edit the generated text directly in this field before saving.

The RCTFC Framework

The Prompt Builder is organized into five sections. Each one shapes a different aspect of how your bot behaves. Complete each section in order before clicking Build Prompt.

R — Role

Define who the bot is and how it communicates with learners.

Field	What to Enter
Prompt Template Name *	A name for this specific prompt configuration. Can match your Template Name or be more descriptive. Example: Frontline Compliance Coach.
Primary Role *	Select the bot's main function from the dropdown. Options include Expert Tutor, Friendly Guide, Motivational Coach, and Subject Matter Expert.
Tone Modifiers	Optional. Check any tone qualities that should shape how the bot communicates. You can select more than one. Options: Calm and reassuring, Encouraging, Professional, Direct and concise, Friendly, Patient with beginners.
Company Voice / Tone	Select the communication style that fits your organization. Options include Plain Language, Supportive Confidence, Action-Oriented, Coach-Like Feedback, and Facilitator Tone.
Words or Phrases to Avoid	Type any words or phrases the bot should never use. Examples: obviously, just, simply, you should have known. Click Add after each entry.
Additional Role Details	Optional. Add specific behavioral instructions. Example: Act as a patient onboarding coach for first-week employees. Keep explanations practical and confidence-building.

TIP The Primary Role and Tone Modifiers work together. An Expert Tutor with a Direct and concise tone will respond very differently from an Expert Tutor with a Patient with beginners tone. Choose combinations that match your audience.

C Context

Describe your learners and the purpose of the course so the bot responds at the right level.

Field	What to Enter
Audience Type	Select the general learner profile from the dropdown. Options include Mixed, Frontline Workers, Managers, and others.
Prior Knowledge	Select how much your learners already know about the topic: None, Some, or Experienced. This affects how the bot explains concepts.
Reading Level	Select the appropriate reading level for your audience: Basic, Standard, or Advanced.
Course Objectives *	Type the main learning objective for the course in one line. The bot uses this to stay on topic. Example: Enable new hires to apply data privacy rules accurately during customer interactions.
Content Tags	Select the tags that best describe the type of training. Options include Corporate Training, Compliance Course, Employee Onboarding, Skill Development, Sales Enablement, and Leadership Development.
Additional Context	Optional. Add specific context the bot should know — such as policy scope, course version, or common learner pain points. Example: Learners use this during customer calls and need fast, policy-safe answers without legal jargon.

T Task

Tell the bot what its most important job is when a learner asks a question.

Field	What to Enter
Primary Task *	Select the bot's main priority from the dropdown. This is required.
Additional Task Details	Optional. Add specific instructions about how the bot should handle its task. Example: If the learner asks a broad question, answer briefly first, then offer one deeper follow-up path.

Primary Task options:

- Answer Questions — the bot's main job is to respond accurately to learner questions.
- Provide Examples — the bot focuses on giving practical, real-world examples.
- Quiz Assistance — the bot helps learners prepare for or work through assessments.
- Summarize Content — the bot condenses course material into key takeaways.
- Coaching Feedback — the bot gives feedback and encouragement based on learner responses.
- On-the-Job Application — the bot helps learners apply knowledge directly to their work.

F Format

Control how the bot structures and delivers its responses.

Field	What to Enter
Answer Structure Preset *	Select a preset format for how the bot organizes its answers. Example: 2-sentence answer + optional bullets gives a short direct answer followed by supporting points.
Max Response Length *	Choose how long answers should be: Short (1–2 sentences), Medium (1 short paragraph), or Long (multiple paragraphs). Medium works well for most use cases.
Clarifying Questions Policy *	Set the rule for when the bot should ask a follow-up question. Recommended: Ask when ambiguous, otherwise proceed.
Response Style	Select a delivery style: Bullet Form, Step-by-Step, Conversational, or Concise Answers.
Additional Format Notes	Optional. Add formatting rules not covered by the presets. Example: Start with a direct answer, then provide 2 bullets labeled What this means and What to do next.

C Constraints

Set the rules and limits that keep the bot safe, accurate, and on topic.

Field	What to Enter
Citation Style	Select how the bot references course content in its answers. Example: According to the course...
External Knowledge Policy	Choose whether the bot can use information from outside the course. Recommended setting: Course-only (never use outside knowledge).

	This keeps the bot limited to content you have reviewed and approved.
When Info Is Missing	Select what the bot should do when it cannot find an answer. Options: Say you can't find it in the provided materials, Ask 1 clarifying question, Suggest where to look in the course. You can check more than one.

Behavior Rules

Check the rules you want the bot to follow at all times. The following options are recommended and are pre-checked by default:

- Do not reveal quiz or test answers — prevents the bot from giving away assessment answers.
- Only answer from course content — limits the bot to the approved knowledge base.
- Admit when unsure — the bot acknowledges when it does not have an answer rather than guessing.
- Maintain professional tone — keeps all responses appropriate for a workplace setting.
- No personal advice — the bot stays within course scope and does not offer personal opinions.

IMPORTANT These behavior rules directly reduce the risk of AI hallucinations. Always enable Admit when unsure and Only answer from course content. A bot without these guardrails is more likely to generate confident but inaccurate answers.

Boundaries and Escalation to Humans

This is one of the most important parts of the Prompt Builder. It defines what the bot will never do on its own, and what happens when a learner needs help that the bot cannot provide. Every bot should have escalation paths configured before it is published.

WARNING If escalation is not configured, learners who ask sensitive or out-of-scope questions may receive no guidance on where to go for help. Always complete this section.

Boundaries

The following hard limits are pre-checked and recommended for all bots. Do not uncheck these without a specific reason:

- Don't ask for passwords or sensitive personal data — the bot will never request private information from a learner.

- Don't invent content not in materials — if the answer is not in the knowledge base, the bot will not fabricate one.
- No legal, medical, or HR advice outside course scope — the bot redirects learners to a qualified person for sensitive topics.

Escalation Fields

These fields tell the bot exactly what to say and who to send a learner to when a question goes beyond what the bot can answer. All four fields are required for escalation to work properly.

> * Required field — the builder will not generate a prompt if this is left blank.

Field	What to Enter
Escalation Target *	The role or name the bot should direct learners to. Be specific. Example: Your direct supervisor, HR Business Partner, or IT Service Desk.
Escalation Message *	The exact message the bot will send when it cannot help further. Write this in a helpful, professional tone. Example: I may be limited by course scope for this request. Please contact the listed support team for a definitive answer.
What Requires Human Support *	Describe the types of situations that always need a real person. Example: Requests involving account access exceptions, disciplinary decisions, legal interpretation, or medical accommodation requests.
Who to Contact for Human Support *	Name the specific person, team, or system. Be as specific as possible so learners know exactly where to go. Example: HR Business Partner for people policy questions, IT Service Desk for access issues, Compliance Team for regulatory interpretation.

> **TIP** Write the escalation message in the same tone as the rest of the bot. If the bot is warm and encouraging, the escalation message should not suddenly sound cold or formal.
>
> Think through the situations that are most likely to require escalation in your specific course. The more specific your What Requires Human Support field is, the more useful it becomes.

Step 2: Build and Review the Prompt

Once all sections are complete, click the Build Prompt button at the bottom of the page.

1. Click Build Prompt.
2. The generated prompt appears in the Final Prompt field at the top of the page.

3. Read through the full prompt carefully.
4. Edit any part of the Final Prompt field directly if adjustments are needed.
5. Click Save Template to add this prompt to your library.

NOTE You can click Build Prompt more than once. If you go back and change any fields, click Build Prompt again to regenerate. Any manual edits you made to the Final Prompt field will be overwritten when you rebuild, so finalize your form inputs first.

Saving and Reusing Prompt Templates

Once saved, your prompt template is stored in the Prompts library under the left menu. You can select it any time you set up a new Learning Assistant or Smart Job Aid, so you do not need to rebuild the same prompt for every project.

If you run similar courses regularly, save a base prompt template and make small adjustments for each new bot rather than starting from scratch each time.

TIP Name your templates clearly so they are easy to find later. Include the audience or topic in the name. Example: Compliance Coach - Frontline Staff or Onboarding Assistant - New Hires.

Quick Reference: RCTFC Framework

	Section	What It Controls
R	Role	Who the bot is, its communication style, and tone.
C	Context	Learner profile, prior knowledge, and course objective.
T	Task	The bot's primary job when responding to questions.
F	Format	How the bot structures and delivers its answers.
C	Constraints	Behavior rules, knowledge limits, and escalation to humans.

Part 4: Knowledge Base Builder

The Knowledge Base Builder is a text editor inside the platform where you write and save the content your bot will use to answer questions. Documents you create here are stored in your knowledge library and can be selected when setting up any Learning Assistant bot.

Think of it as writing a reference document for your bot. The more complete and clear your content is, the better the bot will perform.

How to Access the Knowledge Base Builder

From the left menu, click Knowledge. Then click + Create New Document. You can also access it during the Learning Assistant setup wizard when you reach the knowledge base step.

The Create New Document Screen

Field	What to Enter
Document Title *	Give the document a clear, descriptive name. Examples: Company Policies, Product Documentation, Onboarding FAQs.
Content *	Write or paste your knowledge base content using the built-in editor. You can format text with bold, italics, bullet points, numbered lists, and hyperlinks.

WARNING Do not include confidential, personal, or sensitive information. This content will be used by the AI to answer questions and may appear directly in bot responses. See Part 5 of this guide for full security guidance.

Document Size and Limits

The editor supports up to 85,000 characters, which is roughly 30 to 35 pages of typical text. This limit includes the space used for your text, learner questions, and AI processing overhead.

TIP You do not need to use the full character limit. A focused, well-organized document of 5 to 10 pages will often perform better than a long, loosely organized one. Split large topics into separate knowledge documents instead of cramming everything into one.

Formatting Tips

The way you format content in the editor affects how well the bot can read and use it. Follow these guidelines:

- Use headings to organize the document into clear sections.
- Write in short, direct sentences. Avoid long paragraphs.
- Use bullet points or numbered lists for steps, rules, and lists of items.
- Put the most important information near the top of each section.
- Use plain language. Avoid abbreviations unless you define them first.
- Keep each document focused on one topic or category.

Saving and Reusing Documents

Click Save when you are done. The document is saved to your Knowledge library and can be selected any time you set up a new Learning Assistant. You do not need to recreate it for each project.

You can also edit saved documents at any time. If you update a document that is already linked to a bot, rebuild the bot to apply the changes.

Part 5: Best Practices

Understanding AI Hallucinations

AI hallucinations happen when a language model generates an answer that sounds confident but is factually wrong or made up. This is not a bug — it is a known characteristic of how large language models work. No AI system can fully eliminate hallucinations.

However, hallucinations become much less common when the bot has a strong, comprehensive knowledge base to work from. When the bot finds a clear, relevant answer in the knowledge base, it uses that. When it cannot find an answer, the risk of a hallucinated response goes up.

NOTE This is why the quality of your knowledge base matters. A bot with a thin or vague knowledge base is more likely to produce inaccurate responses than one with thorough, well-organized content.

How to Reduce the Risk of Hallucinations

- Cover the most common learner questions in your knowledge base. If you can predict what learners will ask, write clear answers for those questions.
- Be specific. Vague content leads to vague or incorrect answers. Write precise, factual sentences.
- Avoid gaps. If a topic is in your course but not in the knowledge base, the bot may try to fill in the gap on its own.
- Set your bot's constraints to ***only*** answer from course content. This prevents the bot from pulling in outside information. Our prompt builder offers this as a default preset.
- Turn on Admit when unsure in the bot's constraint settings. This tells the bot to say it does not know rather than guessing.
- Test your bot with edge-case questions — questions that are unusual, ambiguous, or outside the scope of the course. See how it handles them.
- Review and update your knowledge base regularly, especially when course content changes.

TIP After publishing, collect the questions learners actually ask. Use that data to update and expand your knowledge base over time. This is one of the most effective ways to improve bot accuracy.

Building a Strong Knowledge Base

What Makes a Good Knowledge Document

- It covers the topic in the eLearning or job aid clearly and completely.
- It is written in plain, direct language.
- It is structured with headings, short paragraphs, and lists.
- It answers the questions your learners are most likely to ask.
- It does not contain information that is out of date, incorrect, speculative, or off-topic.

How Many Documents Should You Create?

There is no fixed number. A focused course with a narrow topic may only need one or two documents. A broad course covering multiple subjects may need several. The goal is coverage. Make sure every topic in the course has a matching source in the knowledge base.

TIP Create one knowledge document per major topic or module. This makes it easier to update and maintain over time without having to search through one large file.

Testing Your Bot Effectively

Testing is not optional. It is the last line of defense before learners interact with the bot. Follow this approach:

1. Test with at least 10 to 15 different questions covering the main topics in the course.
2. Test with poorly worded or vague questions — these reflect how real learners often type.
3. Ask the same question in different ways to check for consistency.
4. Ask a question the knowledge base does not cover and see how the bot handles it.
5. Ask a question that could be interpreted two different ways.
6. If any answer is wrong, unclear, or off-topic, update the knowledge base and rebuild the bot.

NOTE If you change the knowledge base or the prompt after building the bot, you must rebuild the bot for the changes to take effect. Each rebuild uses one credit.

Part 6: Security and Data Safety

When you build a bot, the content you add to the knowledge base is processed by an AI model and stored in the platform. That content can appear directly in responses that learners see. This means what you put in matters — not just for accuracy, but for security and privacy.

This section explains what to review before uploading content, what is safe to include, what to leave out, and how to handle sensitive information using placeholders.

Review Your Content Before Uploading

Before you add any document to the Knowledge Base Builder, read through it and ask yourself the following questions:

- Does this document contain names, ID numbers, phone numbers, email addresses, or other personal information?
- Does it include financial data such as account numbers, salary figures, or budget details?
- Does it include login credentials, passwords, or access codes?
- Does it include internal system names, server addresses, or network configurations?
- Does it include information your organization considers confidential or restricted?
- Is this content approved for learner-facing use?

If the answer to any of these is yes, do not upload the document as-is. Remove or replace the sensitive content first.

SECURITY: Content in the knowledge base is not hidden from learners. The bot may quote it directly when answering a question. Treat everything in the knowledge base as if it were publicly visible to your learner audience.

What to Include and What to Leave Out

Include	Do Not Include
General policies and procedures written for learner use	Employee names, IDs, or personal contact details
Step-by-step processes with no personal data	Customer records or transaction data
Product or service descriptions	Login credentials, passwords, or API keys
FAQs written for a general audience	Internal financial data, budgets, or salary information
Job role descriptions and responsibilities	Legal documents with confidential case details
Approved training content from course materials	HR records, performance reviews, or disciplinary notes
Definitions, glossaries, and reference terms	Network architecture or IT security configurations
Scenario-based examples using fictional or placeholder data	Anything marked confidential, restricted, or for internal use only

Using Placeholders Instead of Real Data

When your training content requires examples that look realistic — such as a sample employee record, a customer interaction, or a form with data — use placeholders instead of real information.

A placeholder is a fake but believable stand-in for real data. It gives learners the context they need without exposing actual personal or sensitive details.

Placeholder Examples

Field	What to Enter
Employee name	Use: Jane Smith, John Doe, Alex Rivera — not a real employee's name
Employee ID	Use: EMP-00001 or ID-XXXX — not a real ID number
Email address	Use: jsmith@example.com — not a real company or personal email

Phone number	Use: 555-0100 or (000) 000-0000 — not a real phone number
Customer account	Use: Account #ACCT-SAMPLE or Customer #00000
Dollar amount	Use: $X,XXX or [amount] — not a real figure from a system or report
Date	Use: MM/DD/YYYY or [date] when the specific date is not relevant to the learning objective
System or server name	Use: [System Name] or Internal System A — not the actual name of your platform or server
Location or address	Use: 123 Main Street, Anytown or [Branch Location]

TIP: Build a placeholder style guide for your team. Agree on a consistent set of fake names, numbers, and formats so all knowledge documents follow the same pattern. This makes content easier to review and audit.

Additional Security Guidelines

- Assign one person to review and approve knowledge base content before it is published. Do not let every team member upload content without a review step.
- Audit your knowledge base documents periodically. Remove outdated content, especially anything that may have contained sensitive data at the time it was written.
- When a course or policy changes, update the knowledge base immediately. Outdated information in the bot is a security and accuracy risk.
- Do not use real learner responses or chat logs to build knowledge base content. Even anonymized data can carry identifying details.
- If your organization has a data classification policy, apply it to knowledge base content. Only use content that is approved for learner-facing distribution.
- When in doubt, leave it out. If you are not certain a piece of content is safe to include, do not include it.

SECURITY If you accidentally publish a bot with sensitive information in the knowledge base, unpublish the bot immediately, remove the content from the knowledge document, rebuild the bot, and report the incident to your IT or security team according to your organization's data breach protocol.

Quick Reference

Topic	Learning Assistant	Smart Job Aid
File type required	Zip (Storyline or Rise)	PDF only
Knowledge source	Knowledge documents	FAQ list
AI Powered available	Yes	Yes
Keyword Matching available	Yes	Yes
Output	Zip file for LMS	Zip file for LMS
Credits used	1 per bot build	1 per bot build
Refunds	No refunds	No refunds

Template Limits

Creating prompts and knowledge base documents does not use credits. However, each plan has a limit on how many templates can be saved.

Field	What to Enter
Free / Starter	1 saved template
Pro	3 saved templates
Enterprise / Business	20 saved templates

NOTE If you reach your plan's limit, you will need to delete an existing template before saving a new one, or upgrade your plan.

Key Reminders

- Test before publishing. Credits are not refunded.
- A comprehensive knowledge base reduces AI hallucinations.
- Never put confidential, personal, or sensitive data in the knowledge base.
- Use placeholders for any examples that require realistic-looking data.
- Set your bot constraints to ***only*** answer from course content and **admit** when unsure.
- Update the knowledge base whenever course content changes, and rebuild the bot.