

USER GUIDE

BUSINESS ACCOUNT – ADMIN PANEL

LOGGING IN

If the account was created by your eLearning provider, you will need to create a password for the account before logging in. The welcome email includes the account username and a link to a page to where a password can be created. If the account was created when purchasing courses via the payment system, a password was created by the account owner upon registration.

To login to the business admin panel, use the username and password in the login form. Please note:

- The login page for the admin panel is different to the login page for candidates
- The username of the account is generated by the eLearning system using the business name and is **not** an email address.

If you forget the password it can be reset using the link below the login form.

REGISTERING CANDIDATE ACCOUNTS

To create a new account, click 'Create Account' in the sidebar menu. Add the candidate's details to the form, select the course(s) you would like to assign and press the submit button at the bottom of the form.

To add courses to an existing account, navigate to the account's profile page by clicking the account name on the 'Candidates' page (or use the search page in the sidebar), select the course(s) and submit the form. Unused courses can be removed from an account by unchecking a course and submitting the form.

When a candidate account has been created, they will receive a welcome email with their username and a link to create a password.

RETAKEING A COURSE

New course licences can be added to a candidate account that has completed or failed a course previously. To do this, navigate to the candidate's profile page and click the 'Add New' button in the course history section.

LABELS

Labels can be created from this page and assigned to candidates that work in different departments or offices and can help to group them. A maximum of 99 labels can be created. Use the text box at top of the page to create a label. Only alphanumeric characters can be used in a label name.

Labels that you create will appear below the form and the numeric values in the 'Assigned Candidates' column can be clicked to see all candidates with the label. The edit button can be clicked to update the label name, delete the label or bulk assign the label to candidates.

ACCOUNT INFORMATION

Candidate account information can be viewed and updated from their profile. From there you can:

- Update the email address associated with the account
- Add a note
- Send the candidate their login details (Email Login Details button)
- Download course certificates
- Delete the account (if unused)
- Disable or re-enable the account
- Reset failed modules

DISABLING ACCOUNTS

A candidate account can be disabled to prevent it from being accessed. If the candidate has completed a course, their certificate will be invalidated. The

account can also be re-enabled again at any point from the candidate's profile page.

REPORTS

A report can be downloaded using the 'Get Report' option in the sidebar. The report is in [CSV](#) format and will contain a list of candidate accounts with course licences and various details regarding the status of the course.

EXPIRED CERTIFICATES

Candidates with expired certificates will be listed here, with the most recent certificates that have expired first. It is recommended that the candidates re-take the training.

YOUR DETAILS

The company name, email address, telephone number and email reminder preference can be updated using the form on the 'Your Details' page, accessible from the sidebar. The admin panel password can also be changed on this page.

PURCHASING COURSES

Standard business accounts can purchase course licences from the purchase page using the option in the sidebar or contacting the eLearning provider directly. Credit or Subscription accounts should contact their eLearning provider to purchase additional credit or change the subscription tier.