BSC Health & Safety e-Learning Platform
The Company Manager Role

Introduction
The *Company Manager* role is given to any user with responsibility for resolving the issues raised in self-assessments of the users assigned to them, ensuring that these users also comply with the organisation's health & safety training requirements. This could be a health & safety coordinator, line manager, department head, etc.

When a person with the *company manager* role logs in they will see any courses that they are enrolled on and information regarding the employees that have been assigned to them.

Along with their own training Managers can see:
- Course completion Overview – This is a breakdown of how many users are enrolled onto the course and how many have completed and how many still need to complete.
- Issues overview – This is an overview of the number of issues have been raised in the DSE Self-assessment and how many still need attention.
- Administration block – A Manager has reduced administration rights, they can view users and completion data along with any Self-Assessment issues raised.

Shown below is an example of a Manager that is enrolled onto the Fire Safety training and has employees assigned to them on the Display Screen Equipment and Fire Safety training:

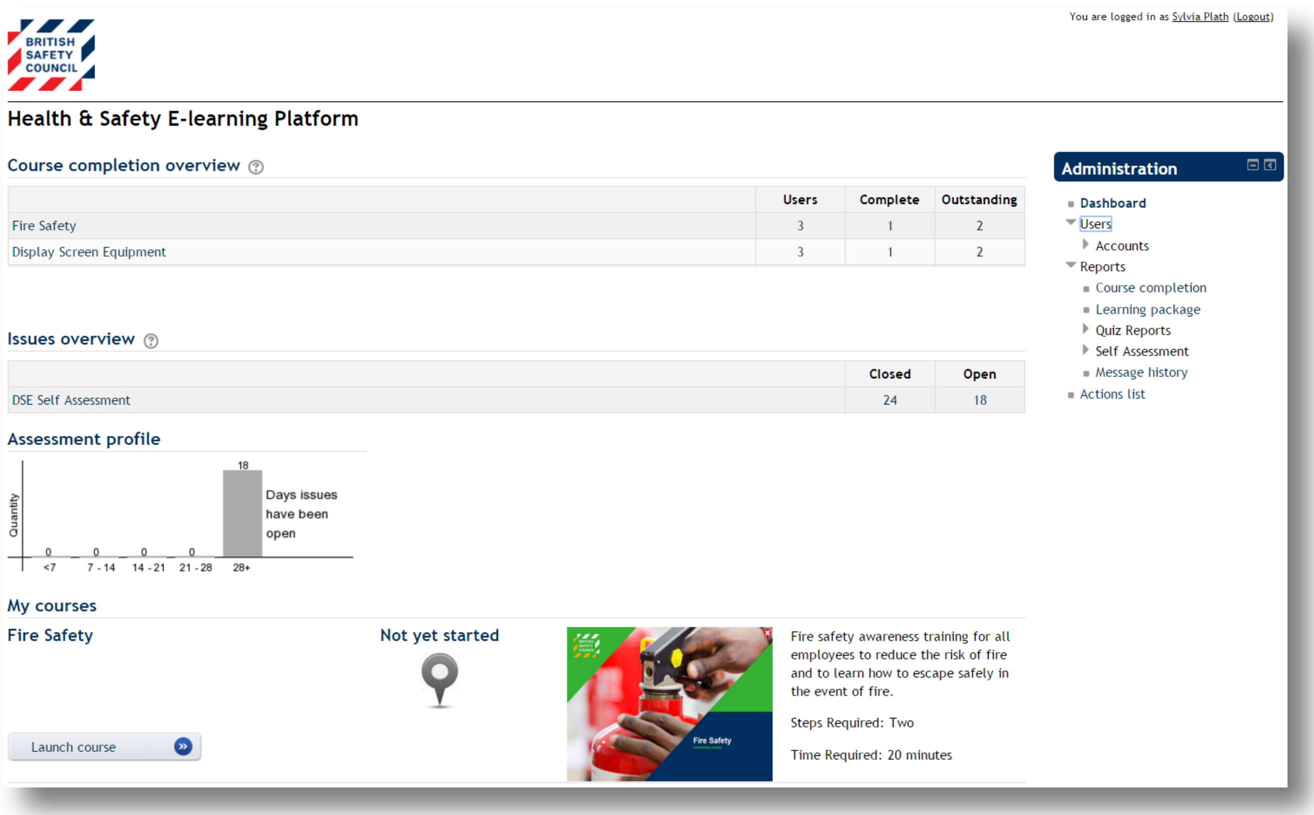

Figure 1 - The Manager's View

Assigning the Role and Selecting Managed Users

There are two methods of assigning the *Company Manager* role and linking managers to users:

1. Individually on the platform
2. In bulk via a CSV file upload

Both methods assume that accounts already exist on the platform for the manager and the users who need to be linked to him/her.

Method One – Assigning the Company Manager Role on the Platform
Assigning the Company Manager role on the platform is a two-step process:

Step One: Assigning the role

Step Two: Assigning users to the manager

Assigning the Role
To assign the *Company Manager* role to a user:

1. Click on **Administration** > **Users** > **Permissions** > **Assign roles**
2. Click on the '**Company Manager**' link
3. Use the search box to find the person who needs the role
4. Select the user in the list
5. Click on the **Add** button

This person will now have the *Company Manager* role but will not yet be able to see any user data. To enable this, we need to tell the platform which users report to them.

Linking Users to the Manager
To link a user to the manager, follow these instructions:

1. Go to **Administration** > **Users** > **Accounts** > **Browse list**
2. Use the filters to search for the user whose data needs to be available to the manager
3. Click on **Edit** adjacent to that user
4. Click on the **Manager** link to expand that area of the user's profile
5. Select the desired manager from the drop-down list
6. Click on the **Update profile** button
7. Repeat steps 2 to 6 as needed to assign more users to the manager

The selected manager will now be able to view data for each user assigned to them as well as receive email notifications about their training and self-assessment progress (if email notifications have been enabled).

Method Two – Assigning the Company Manager Role via a CSV File Upload
Using this method you can assign the manager role to individuals and assign users to managers in bulk.

The first thing we need to do is prepare a CSV file which contains the data needed. The best starting point for this is to download existing data from your platform. You can then edit this data as needed to create your file.

To download user data:

1. Go to **Administration** > **Users** > **Accounts** > **Download list**
2. (optional) Use the filter to select a subset of users
3. Click on the **Add all** button (the content of the left column should then be copied to the right)
4. Click on the **Download list** button

A CSV file will then be downloaded to your computer. You can open this file in any spreadsheet program (including Excel).

The CSV file needs to be edited before it can be used. The following columns need to be removed:

- 'id' (usually column A)
- 'firstaccess' (usually column H)

Locate a user who needs to be assigned to the new manager and enter the new manager's email address in the 'profile_field_manager' cell. When uploaded, this will give the person whose email address you entered the *Company Manager* role and link them as a manager for that user. You can repeat this for each person who needs to be linked to that manager.

In the example below Emma Jones would be given the *Company Manager* role and linked to Jane Smith as her manager.

	A	B	C	D	E	F	G	H	I
1	auth	username	email	firstname	lastname	country	custom_department	custom_citytown	profile_field_manager
2	active	jane.smith	jane.smith@fakemail.com	Jane	Smith	GB	Finance	London	emma.jones@fakemail.com

Figure 2 - A CSV File

Once prepared, the file needs to be uploaded to the platform. To do this:

1. Go to **Administration** > **Users** > **Accounts** > **Upload users**
2. Drag and drop the file into the box with the blue arrow or use the **Choose a file button** to select it
3. Click on the **Upload users** button
4. In the Settings area beneath the file preview change the following options:
    a. Change **Upload type** to "Update existing users only"
    b. Change **Existing user details** to "Override with file"
5. Click on the **Upload users** button

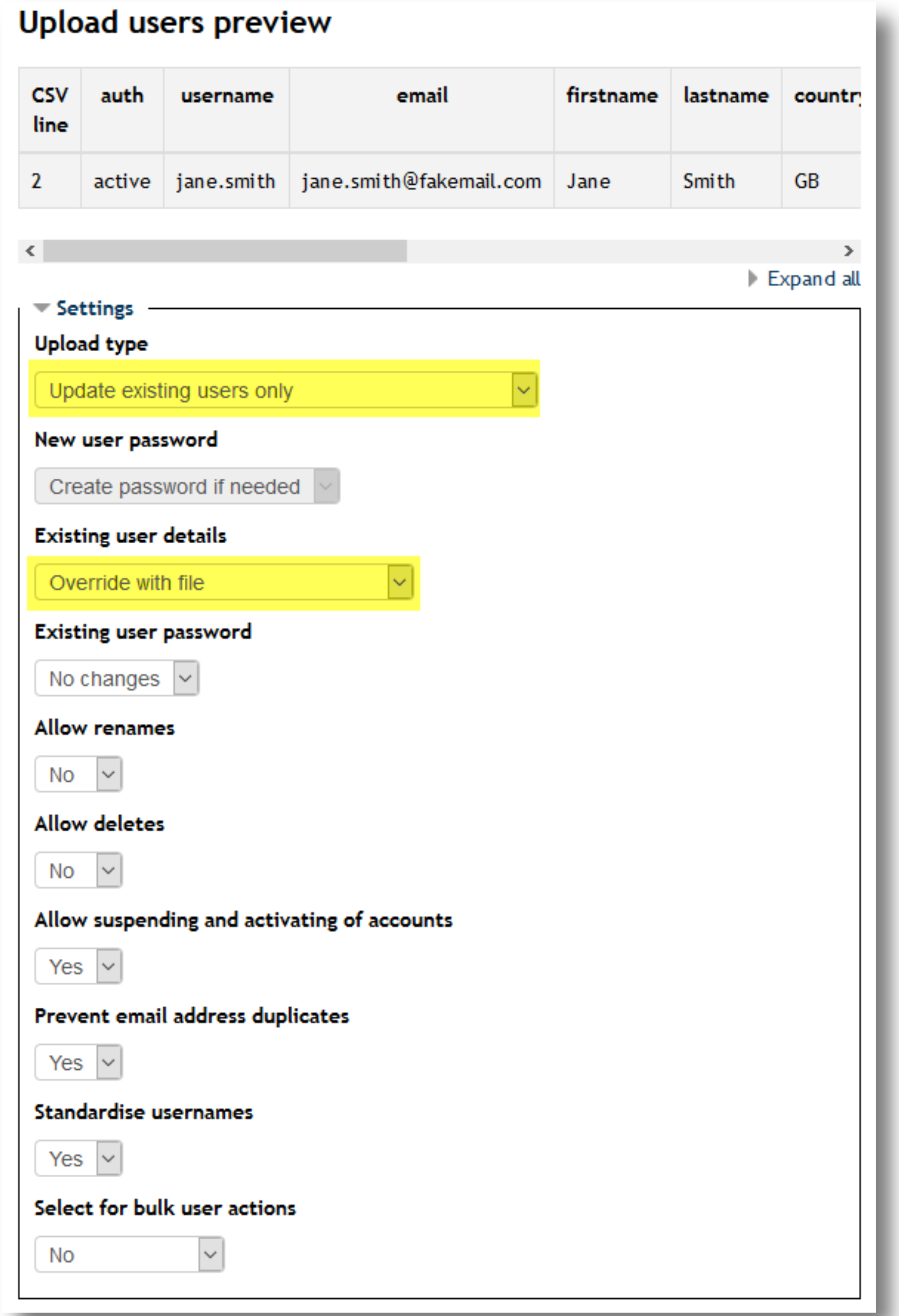

Figure 3 - Upload Settings

Next you will now be presented with a progress screen that will list each row in the spreadsheet as the accounts are updated. Once complete, your new manager/s will be given the Company Manager role and linked to the relevant users.