Admin guide for your Enterprise Health and Safety platform

Enterprise Health & Safety e-Learning Platform.

The Enterprise platform is used by organisations to carry out and manage the results of the Health & Safety courses and self-assessments completed by their staff. As a Company Administrator on your platform you are able to perform user management, access control and system configuration. This handbook serves as a reference and user guide. You will find examples and step-by-step guides to the functions of the site.

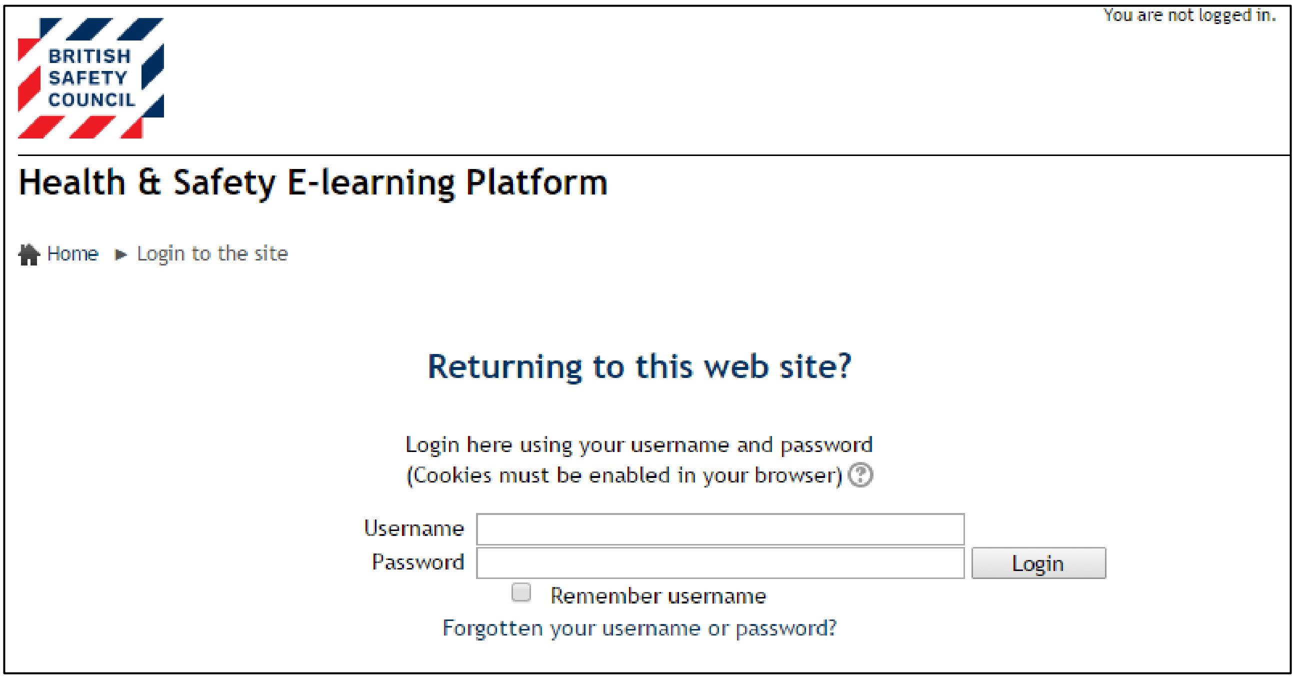
Contents

How to login:

This will show you how to login to your enterprise LMS platform.

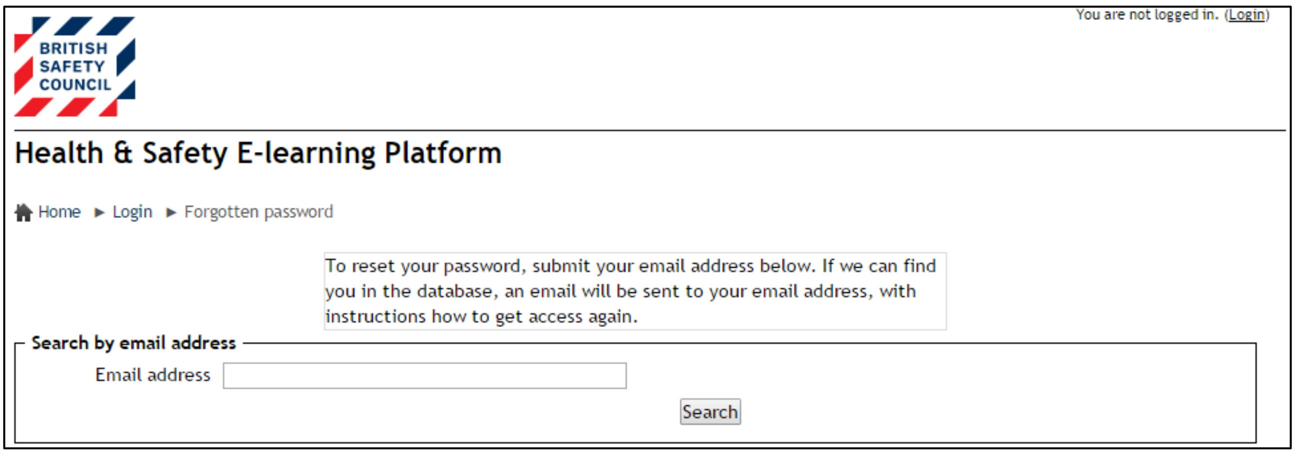
Logging in:

- Firstly, you will need to navigate to your company's website, this will be: (Company id).britsafelearning.com – example.britsafelearning.com
- Once on your company's site you will see a screen similar to the one shown below, possibly with your company's logo on the top left of the page in place of the British Safety logo shown below.
- You then need to input your Username and password, this will have been previously communicated to you.



Requesting a new Username or Password:

- Should you need to request your username or password you can do so by clicking the "Forgotten Username or Password" link underneath the login section of the screen.
- This will then take you to a separate page, where you can input your email address and an email will be sent to your inbox with your login details.



Roles

Roles Defined:
There are a number of different Roles used on the Enterprise platform, they have different uses and levels of permissions.

Employee: The Employee is a user that is only on the platform to undertake training, they have no access to any reporting or administrative applications.

Manager: This 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.

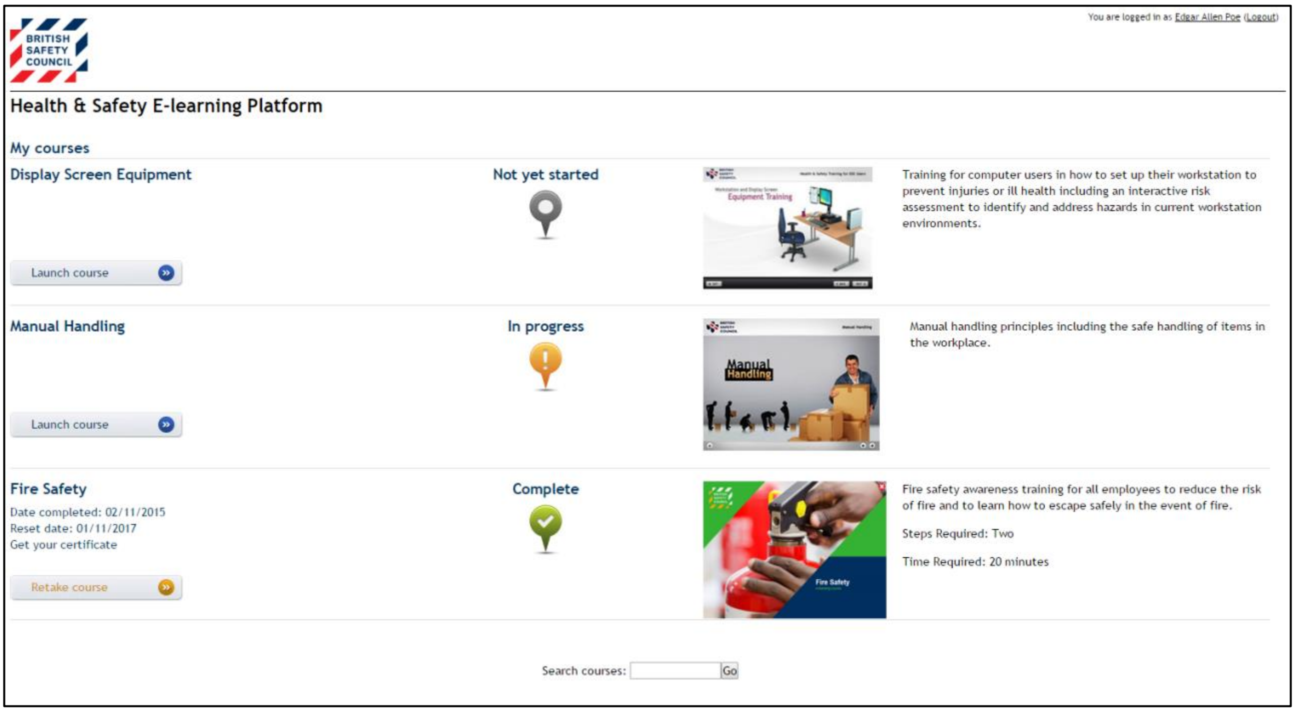
Company admin: This role is given to any user who should be able to add, edit, activate or deactivate users; enrol or revoke course enrolments; assign roles to other users; manage repeat training and self-assessment settings; manage e-mail notifications; run reports; and resolve the issues raised in self-assessments. A Company Administrator can assign roles to other staff members.

Roles explained
This is a brief overview of what each role can do and see when logged into the Enterprise platform.

Capability	Employee	Company Manager	Company Administrator
Undertake training and assessment	Yes	Yes	Yes
View own training progress	Yes	Yes	Yes
View training progress of others	No	Only for staff they are responsible for	Yes
View own self-assessment records	Yes	Yes	Yes
View self-assessment record of others	No	Only for staff they are responsible for	Yes
Resolve own self-assessment issues	Yes	Yes	Yes
Resolve self-assessment issues of others	No	Only for staff they are responsible for	Yes
Manage user status	No	No	Yes
Manage user roles	No	No	Yes
Manage user enrolment	No	No	Yes
Manage user records	No	No	Yes
Manage global platform settings	No	No	Yes
Undertake training and assessment	Yes	Yes	Yes

Employee

An employee can login and undertake training, they have no admin rights and will only be able to see the training that they have been enrolled onto by a company administrator. Shown below is an example of an employee that is enrolled onto the Display Screen Equipment, Manual Handling and Fire Safety training:

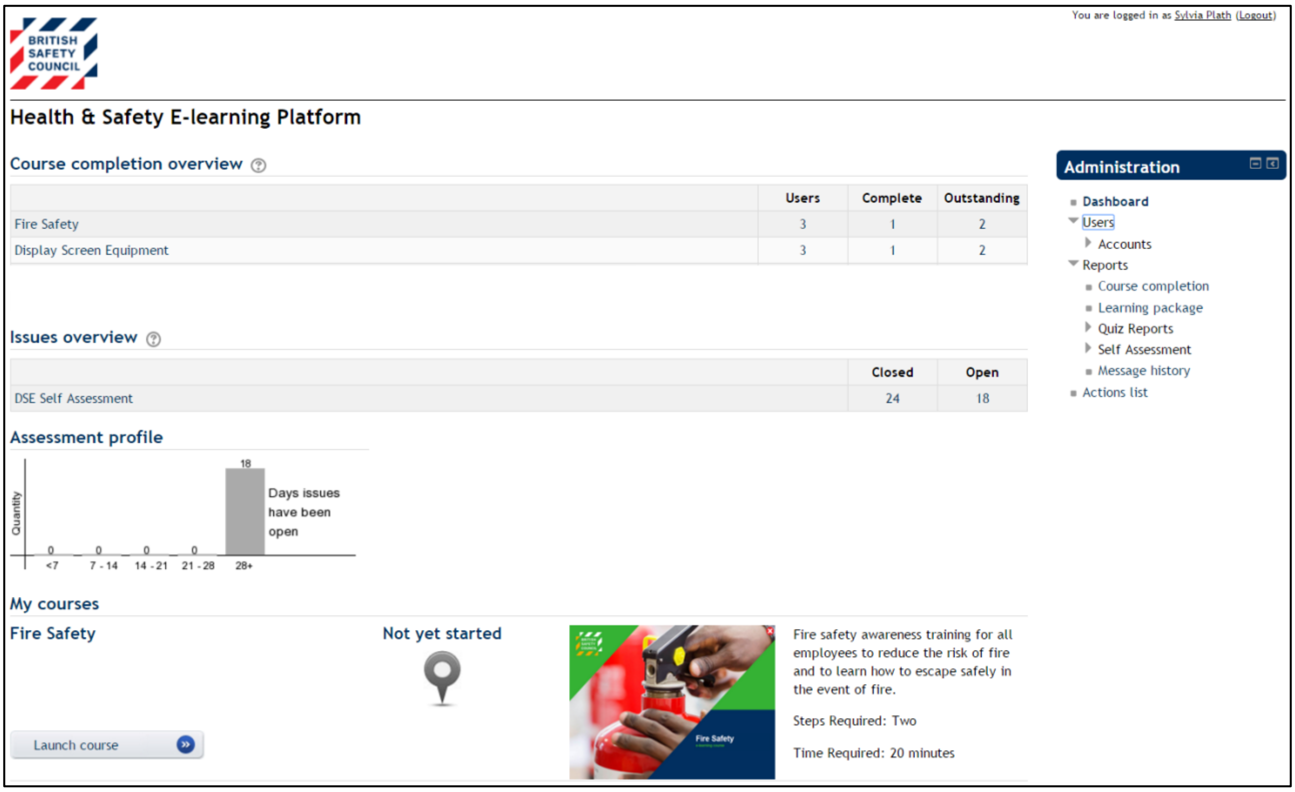


Manager

As a Manager when you login you will see any courses that you are enrolled on but also you will see some information regarding the employees that have been assigned to you.
Along with their own training Managers can also 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 also has employees assigned to them on the Display Screen Equipment and Fire Safety training:

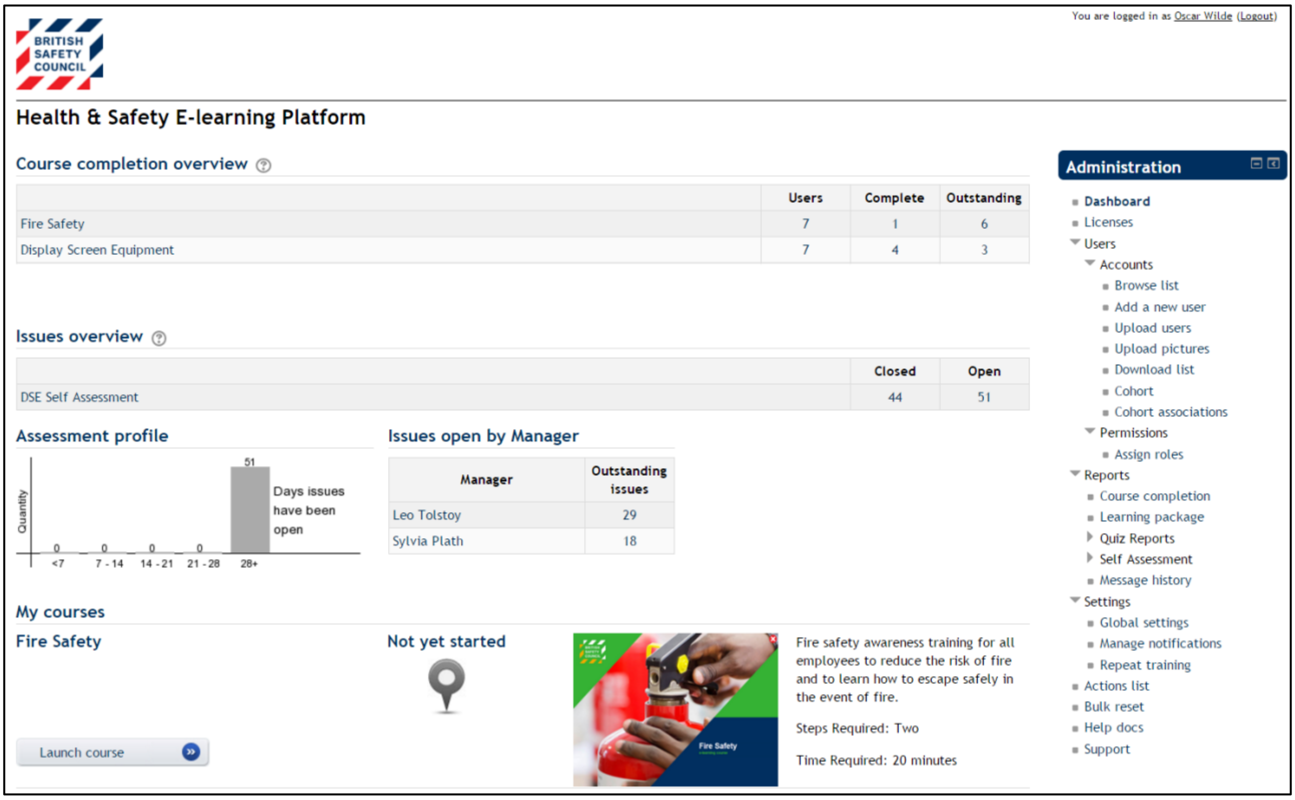


Administrator

Administrator will see any courses that they are enrolled on and will also see information regarding all the employees that have been uploaded to the platform.
Along with their own training Administrators can also see:

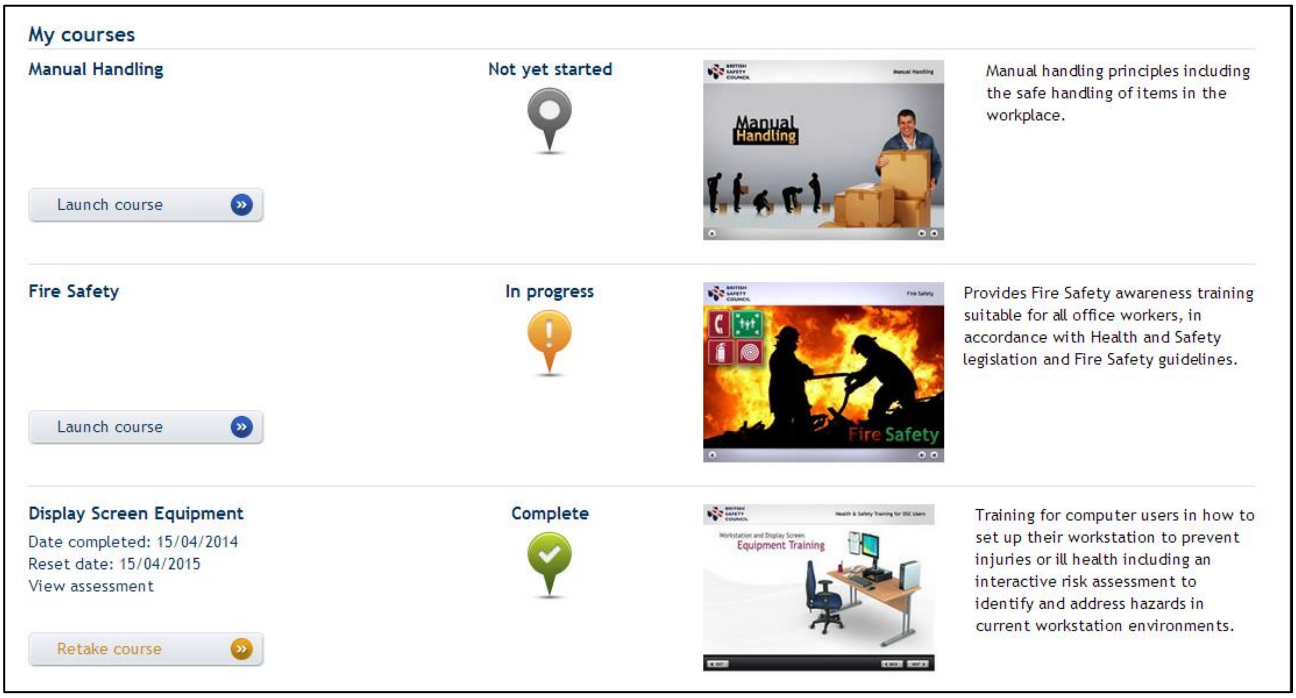
- **Course completion Overview** – This is a breakdown of how many users are enrolled onto the course and how many have completed and how many still need to complete.
- **Issues overview** – This is an overview of the number of issues have been raised in the DSE Self-assessment and how many still need attention.
- **Issues open by Manager** – This is an overview of each manager and how many Issues are assigned to each and how many are still un-resolved.
- **Administration block** – An Administrator has full administration rights, they can view and edit user's information, they can upload new users, report on various information and control the notifications and repeat training settings.

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



My Courses

My Courses will display a list of courses that a user has been added to. It provides information about your personal course completion and allows access to training.

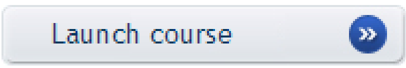


My Courses List consists of three elements:

- The Launch course or Retake course button
- The course progress indicator
- A description of the course

The Launch and Retake course buttons

The **Launch** course button will take you into the selected course.



The **Retake course** button will only appear when a course has been configured for repeat training. The **Retake course** button will reset the course and begin a new attempt. When this button is clicked a confirmation dialogue will appear warning the user that continuing will reset their progress on that course.

Course progression indicators

The course progress indicators prove at-a-glance information on the user’s personal course progression. They can be in one of three states:

	**Not yet started**	The user has not completed any steps in the course.
	**In progress**	The user has completed at least one step in the course
	**Complete**	The user has completed the course.

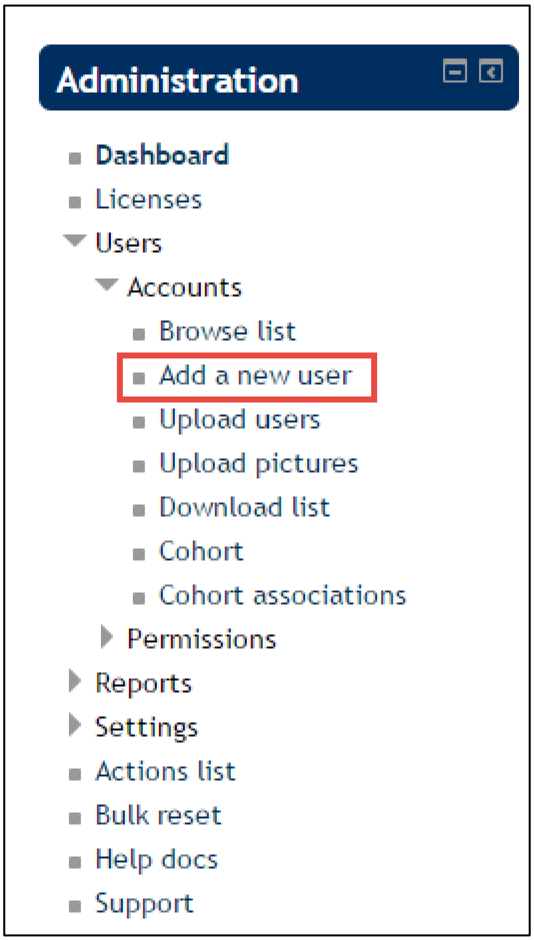
Manually adding users

This section explains how to add users, it is useful if you wish to add a single user or a small number of users. Otherwise, we would recommend uploading users instead.

Please be aware that this task has **two** stages: first you must add the user, then enrol the user on a course(s). Both of these stages are outlined below. If you do not complete the second stage, then the user will not be enrolled on any courses.

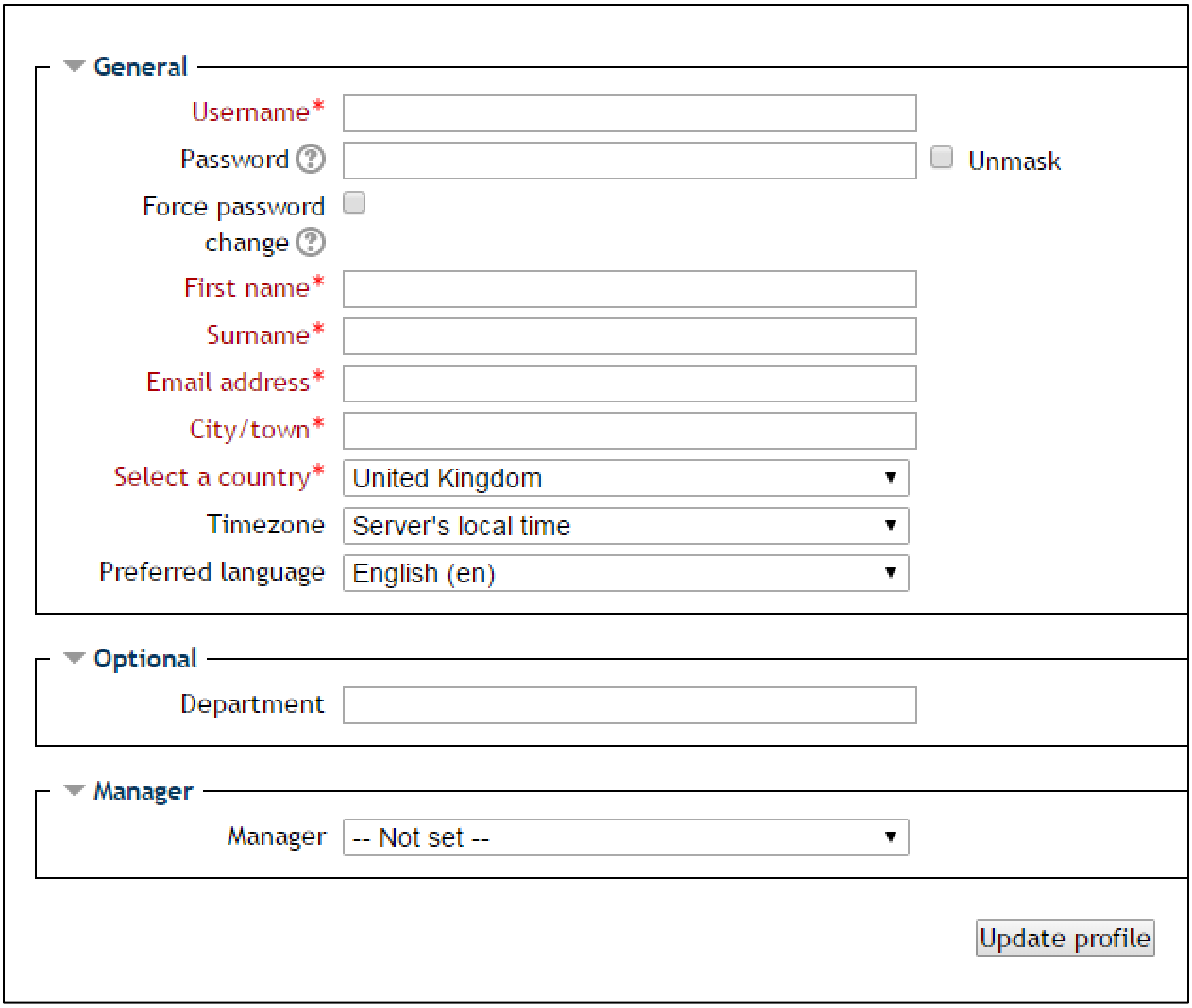
Adding a user requires an administrator's role.

- Once an administrator is logged in, navigate **Administration > Users > Accounts > Add a new user**.



Add a new user screen.

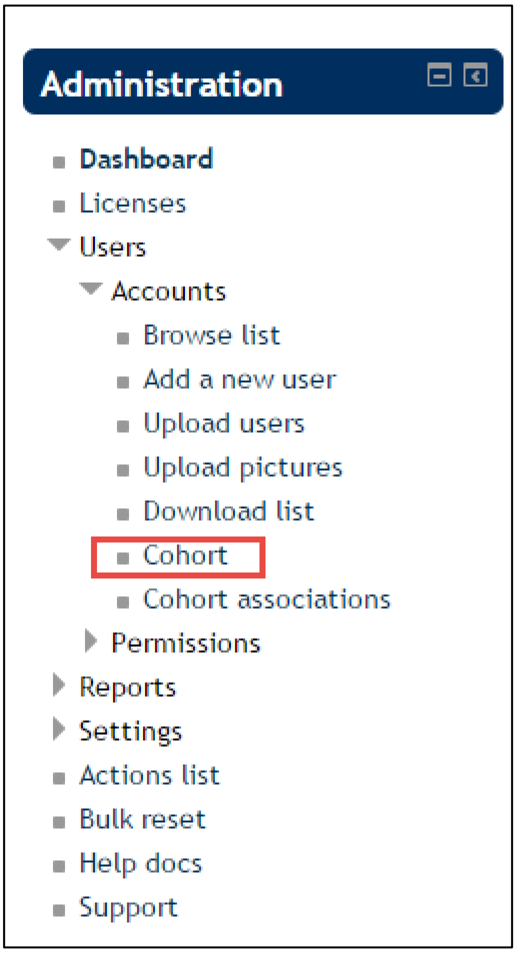
Here, add the new user's details. Fields in red with asterisks are compulsory.



- Tick "Force password change" to ensure that the platform requires new users to change their password when they log in for the first time. This is not compulsory, but we recommend that you tick this box, for the benefit of users' security.
- The platform will accept any email address in the following format: xxxxxxx@xxxxx.xxx. Therefore, please ensure that you double-check the email address, as the platform will not recognise if it not a valid address.
- You can click on **Optional** to expand to view the Department field, or any other customised fields you may have on your platform.
- To assign this user to one of the managers on your platform, click on **Manager** to view a drop-down list of managers.
- Once the details are completed, click **Update profile**.

Once you click on Update profile, you will see a list of users, now including the new user**.** This new user is now able to log in to the system, but is not yet enrolled on any courses.

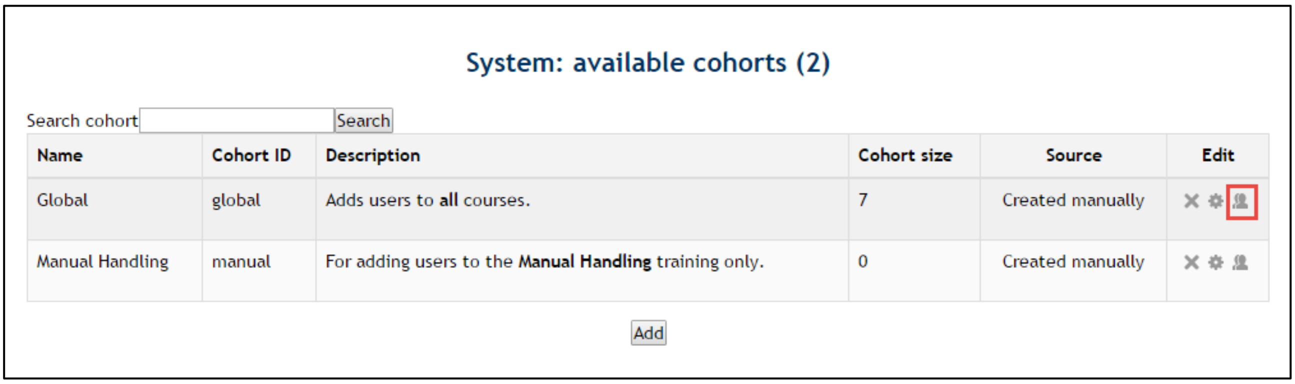
To enrol users on courses, select Administration > Users > Accounts > Cohort



On this screen you will see all available cohorts. You can add users to one or multiple cohorts, depending which courses you wish them to have access to.

To add users to cohorts, follow the process outlined below:

- For each cohort that you wish to add your user to, select the small icon which looks like two people's heads and shoulders.



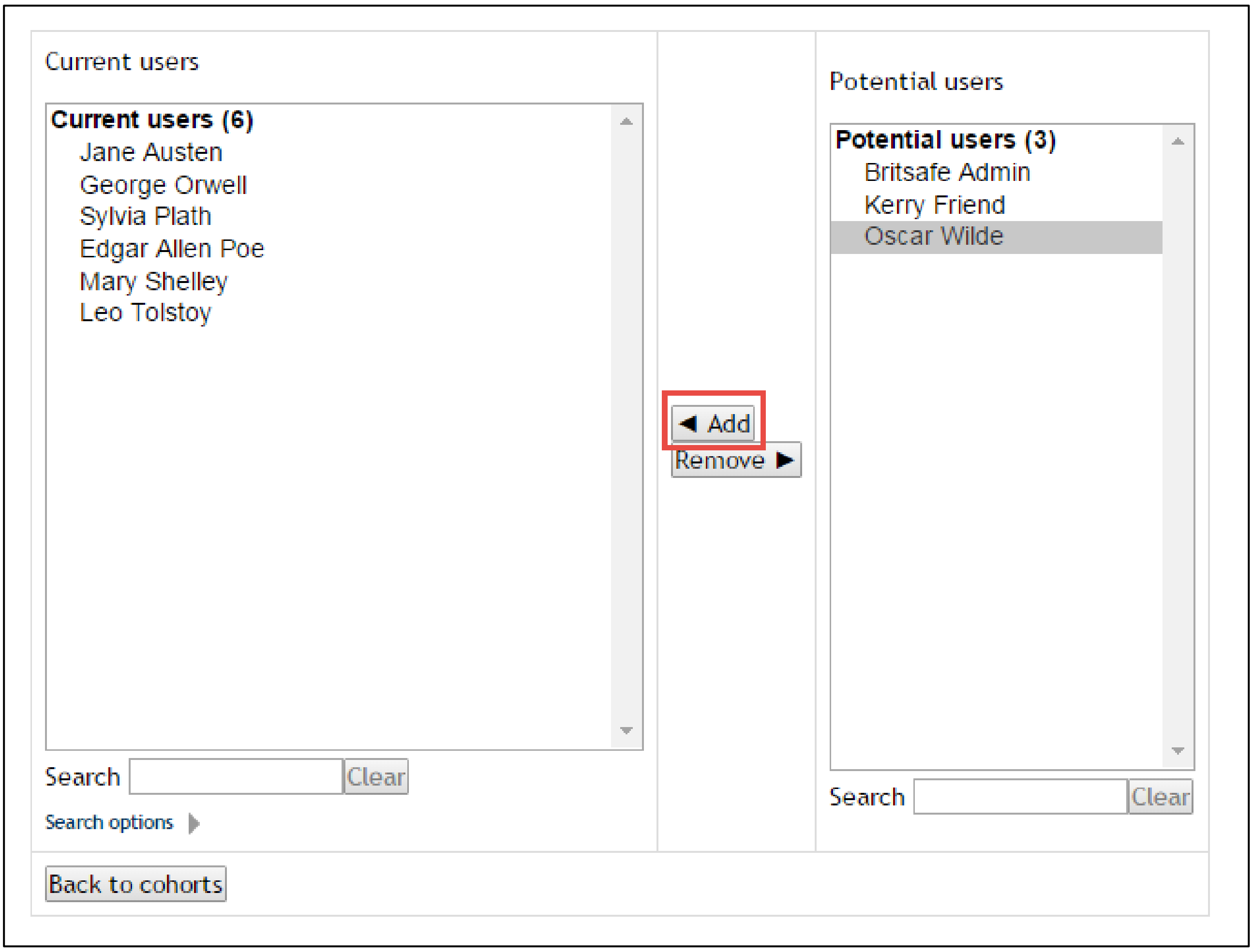
System: available cohorts (2)

Search cohort [ ] Search

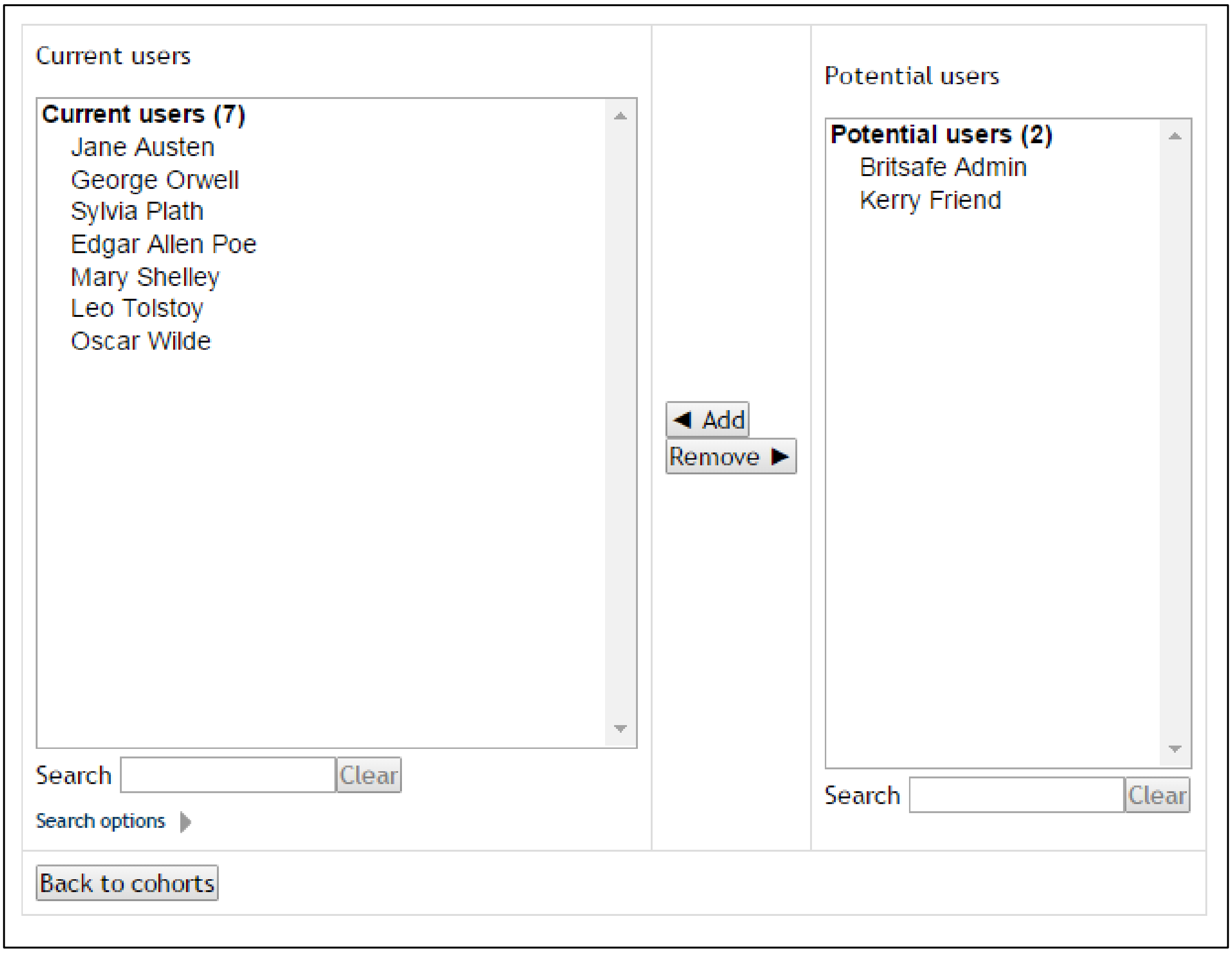
Name	Cohort ID	Description	Cohort size	Source	Edit
Global	global	Adds users to **all** courses.	7	Created manually	
Manual Handling	manual	For adding users to the **Manual Handling** training only.	0	Created manually	

Add

- On the next screen, on the left you can see a list of current users in this cohort, and on the right you can see a list of potential users, including the user you have just added.
- On this occasion we are going to add Oscar Wilde to a cohort.
- To do this, select Oscar's name, then click **Add** to move him from the right to the left.



- Below you can see that Oscar has been added to the current users of the cohort.



- If you wish to remove users from a cohort, you can follow the exact same process, but from left to right, by clicking “remove”.
- If you wish to manipulate multiple users, use the shift or control buttons on your keyboard to highlights multiple names before you click **Add** or **Remove**.
- Once the user has been added the appropriate cohort(s), they are ready to begin undertaking courses.

Uploading multiple users

By uploading a list of users, you can create or update existing users, place them in cohorts and assign or reassign Company Managers, all at the same time.

Formatting the file

The user upload feature requires a CSV file, i.e. with its fields separated by a comma (or other delimiter). The first line contains the valid field names. The rest of the lines (records) contain information about each user. Fields have a character size limit of 255 characters and special characters, such as quotation marks or commas, should not be included in field information. A list of all the field names and examples can be found on the following page

TIP: Test a file with only one record before a large upload.

Example of CSV file displayed in Microsoft Excel:

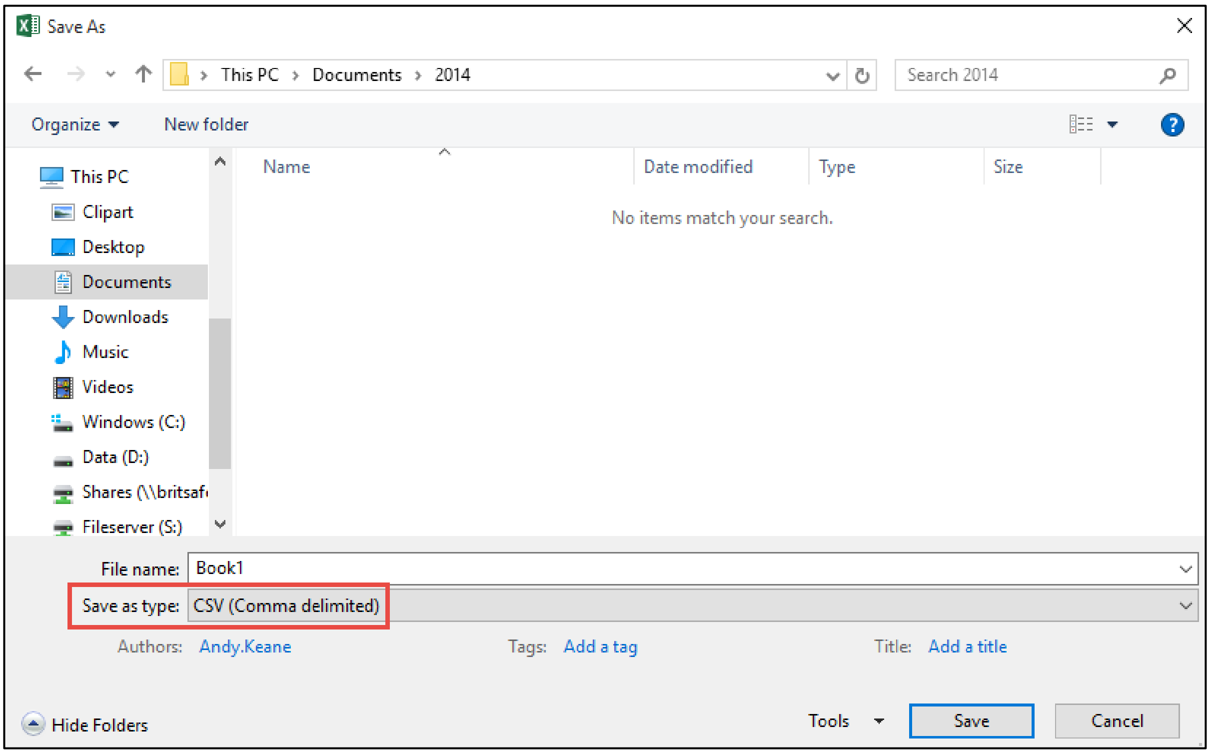
	A	B	C	D	E	F	G	H	I	J
1	username	firstname	lastname	email	password	department	city	profile_field_manager	cohort1	cohort2
2	joebloggs	Joe	Bloggs	joe.bloggs@email.com	password123	IT	London	manager@email.com	dse	gehs
3										

Example of CSV file displayed in Notepad:

```
username,firstname,lastname,email,password,department,city,profile_field_manager,cohort1,cohort2
joebloggs,Joe,Bloggs,joe.bloggs@email.com,password123,IT,London,manager@email.com,dse,gehs
```

How to save a CSV file

Once you have the required information in an Excel spreadsheet you need to save the document, go to **File** and **Save as**. This will open up a dialog box where you can choose the file type as **CSV (Comma delimited).**



Field names and usage

Field name (case-sensitive)	Usage	When required
username	The user will use this and their password to log on to the site. It must be unique for each user but may be changed to something else at any time. A username can only contain alphabetical letters in lowercase, numbers, hyphen '-', underscore '_', period '.', or the '@' character.	Always
firstname	This is the user's first name. It is displayed along with their surname in messages, participants list, reports, and anywhere else something about the user is displayed.	Always when adding new users (optional otherwise)
lastname	This is the user's surname. It is displayed along with their first name in messages, participants list, reports, and anywhere else something about the user is displayed.	Always when adding new users (optional otherwise)
email	Course completion requests, password reset notices, and other e-mail messages are sent to this email address	Always when adding new users (optional otherwise)
password	The user will use this and their username to log on to the site. If this field is left blank, a password will be randomly generated for the user.	Optional when adding or updating users
department	The department in which the user is located	Optional when adding or updating users
city	The city or town in which the user is located	Optional when adding or updating users
country	The country in which the user is located. NOTE: The country values must be the ISO 3166-1-alpha-2 code as listed here: http://www.iso.org/iso/country_names_and_code_elements. For example, if the user is in the "United Kingdom", the value in the CSV file must be "GB".	Optional when adding or updating users
profile_field_manager	The e-mail address of the 'Company manager' with responsibility for managing issues identified in self-assessments and ensuring a particular member of staff complies with the organisation's health & safety training requirements. NOTE: A 'Company manager' must also have a user account on the site.	Optional when adding or updating users
cohort1	The ID of the cohort in which to place the user. To place the user in multiple cohorts, create a sequential list of field names for each cohort ID, e.g. cohort1, cohort2, cohort3, ...	Optional when adding or updating users
auth	This field is used to activate or deactivate user accounts. Accepted values are: • active • inactive	Optional when adding or updating users
oldusername	This field is used to change user names. Specify the existing username for particular accounts here and they will be changed to the value specified in the corresponding 'username' field.	Optional when updating users
deleted	This field is used to delete users. Specify a value of 1 for every user account to be deleted. WARNING: When a user account is deleted, all their associated training and risk assessment history are also irrecoverably deleted.	Optional when updating users

NOTE: The profile fields in this documentation are the standard fields and may have been customised to suit your particular needs. However, the same principles apply.

How-to

Prepare a CSV file with the list of users (and the IDs of the cohorts in which they should be placed to enrol them in courses). Save the file to a location on your PC, e.g. the desktop.

1. In the Administration panel navigate to the **Upload users** link. You should be taken to the 'Upload users' screen.
2. You can click the **Choose a file ...** button to launch the File Picker or simply drag and drop the file into the box on screen.
3. Once you have the required document click the **Upload users** button. You can ignore the options in the dropdown fields below the upload box, these are pre-set and are correct.

4. Once you have clicked the **Upload users** button, you will be taken to the 'Upload users preview' screen.
5. A sample of the records in the CSV file is displayed. Check that this is a satisfactory representation of the data, then review and/or adjust the upload settings to achieve the desired outcome (see **Settings** on the following page for more information). Otherwise, prepare an updated CSV file and restart the procedure.
6. Click the 'Upload users' button. You should be taken to the 'Upload users results' screen.
7. The results of the upload, including any exceptions, are displayed for each user record in the CSV file.

Settings

Upload type
- ‘Add new only, skip existing users’ – to only add new users from the CSV file. Existing user accounts will not be updated.
- ‘Add new and update existing users’ – to add new users and update existing user accounts at the same time
- ‘Update existing users only’ – to only update existing user accounts with the CSV file. New user accounts will not be created.

New user password
If a password was included in the CSV file for every new user and you want to ensure that only these passwords are used, select ‘Field required in file’. Otherwise, select ‘Create password if needed’ to allow the system to generate a random password for every user without a password in the CSV file.

Existing user details
This is relevant when existing user accounts will be updated with the CSV file.
- ‘Override with file’ – existing user account data will be changed to that in the CSV file, if different
- ‘Override with file and defaults’ – existing user account data will be changed to that in the CSV file or default values, if different.
- ‘Fill in missing from file and defaults’ – existing user account data that is missing will be filled in with the information in the CSV file and default settings.

Existing user password
Select ‘update’ if you want to reset the password of all existing users that appear in the CSV file. Otherwise, set this to ‘No changes’.

Prevent email address duplicates
Select ‘Yes’ to ensure multiple users do not have the same e-mail address.

Standardise user names
Select ‘Yes’ to ensure users with non-standard usernames (e.g. uppercase characters, etc.) are not skipped. Instead, the system will ‘standardise’ their user names before creating their user accounts.

Select for bulk operations
Select ‘No’. The other options are not relevant to this task.

Default values
Leave these values unchanged.

When satisfied that the information you wish to upload and the setting are correct click the **Upload users** button at the bottom of the page and you will then be taken to a new page that will inform you of all the changes and any errors that occur. If for any reason you receive errors that stop any changes you may need to review the data that you are trying to upload. You should review the file using the information in this document to find why the file is not working, it may be a problem with the formatting of the text in the fields.

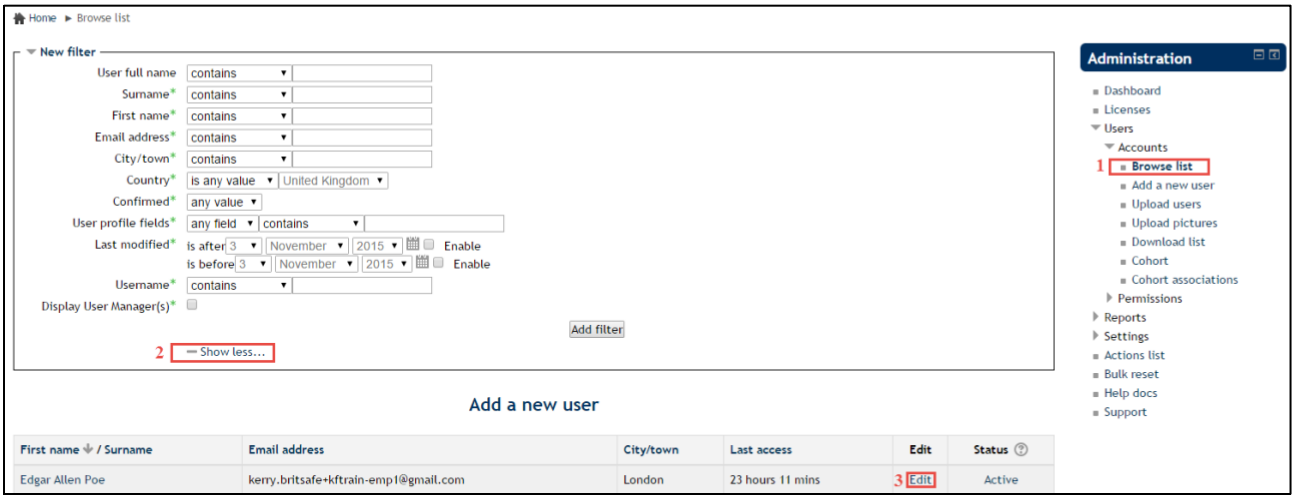
Editing users manually

An existing user account may be updated at any time to reflect changes in their circumstances, e.g. change of location, new e-mail address, name change, etc.

NOTE: Multiple users may be updated at the same time using a CSV file.

How-to

1. In the Administration panel navigate to the **Browse List** link under Users
2. You can filter the information by clicking **Show More** and entering in any required field. Once expanded the **-Show More** link will change to **-Show Less.**
3. Click the 'Edit' link across from the user. The user's current details are displayed.



Enter new information as required and click the **Update profile** button. Repeat the procedure for each user account to be updated.

Required fields

- Username: The user will use this and their password to log on to the site. It must be unique for each user but may be changed to something else at any time. A username can only contain alphabetical letters in lowercase, numbers, hyphen '-', underscore '_', period '.', or the '@' character.
- First Name: This is the user's first name. It is displayed along with their surname in messages, participants list, reports, and anywhere else something about the user is displayed.
- Surname: This is the user's surname. It is displayed along with their first name in messages, participants list, reports, and anywhere else something about the user is displayed.
- Email address: Course completion requests, password reset notices, and other messages are sent to this email address from the site.
- City/town: The city or town in which the user is located
- Country: The country in which the user is located

Optional fields

- Password: The user will use this and their username to log on to the site. Leave this field blank for the password to remain unchanged or enter a new password for this user.
- Time zone: This setting is used to adjust the times of messages and assignment/quiz due dates to match the user's local time
- Preferred language: This will cause the site's interface to be displayed in the specified language. Note: Content will not be translated automatically, but if multi- language content is available in the preferred language, it will be displayed.
- Department: The department in which the user is located
- Manager: This is a list of all users who have the Company Manager permissions that allow them to run reports and resolve self-assessment concerns of the users assigned to them. Select a 'Manager' from the drop down menu to assign this user to them.

Notes

- The profile fields in this documentation are the standard fields and may have been customised to suit your particular needs. However, the same principles apply.
- A 'Company Manager' does not necessarily have to be a user's actual line manager. This can be any user with responsibility for managing issues identified in self-assessments and ensuring members of staff comply with the organisation's health & safety training requiremens.

Creating cohorts

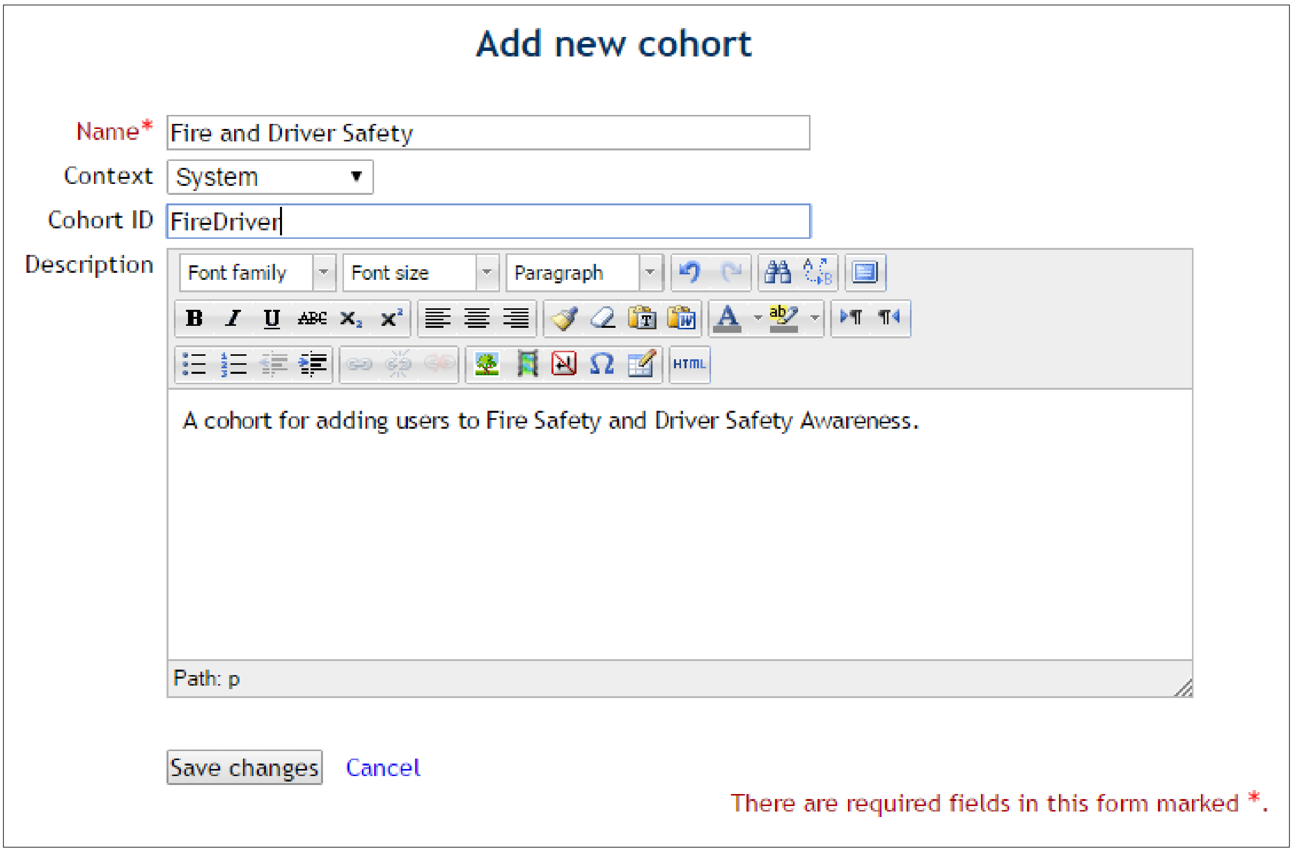
You will have a selection of cohorts on your platform but you may find you need to create another. For example, you may be continually adding users to both Fire Safety and Driver Safety Awareness training and wish to create a cohort for only those two courses. Creating a new cohort involves two stages:

1. Creating the cohort
2. Associating the cohort with the course/s

Stage 1: Creating the cohort

In order to create the cohort we would follow the steps below:

1. Access the cohort screen via **Administration** > **Users** > **Accounts** > **Cohort**
2. Once the list of cohorts appears, click on the **Add** button
3. Enter a name for the cohort. In this example I have used ‘Fire and Driver Safety’
4. Enter a cohort ID. The Cohort ID will be used to identify the cohort when we are adding users via a CSV file upload. The Cohort ID cannot contain spaces. In this example I have used ‘FireDriver’.
5. Enter a description. This can be used to act as a reminder and to advise other administrators of the purpose of the cohort. In this example I have entered ‘A cohort for adding users to Fire Safety and Driver Safety Awareness.’
6. Click on the **Save changes** button



System: available cohorts (3)

Search cohort [Search]

Name	Cohort ID	Description	Cohort size	Source	Edit
Fire and Driver Safety	FireDriver	A cohort for adding users to Fire Safety and Driver Safety Awareness.	0	Created manually	
Global	global	Adds users to **all** courses.	7	Created manually	
Manual Handling	manual	For adding users to the **Manual Handling** training only.	0	Created manually	

[Add]

Stage 2: Creating a cohort association

We have now created the cohort. However, the platform does not yet know which course or courses we would like users in this cohort to be added to. We need to create an association between the cohort and the course/s. We can achieve this through the following steps:

1. Access the Cohort Association screen via **Administration** > **Users** > **Accounts** > **Cohort associations**
2. We now see a four column table

Cohort associations

Add

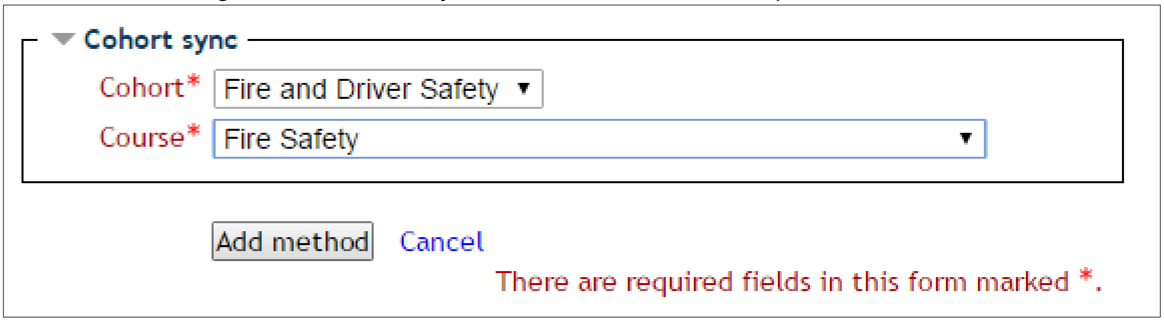
Course	Name	Users	Edit
Display Screen Equipment	Cohort sync (Global - Employee)	7	
Fire Safety	Cohort sync (Global - Employee)	7	
Manual Handling	Cohort sync (Global - Employee)	7	
Manual Handling	Cohort sync (Manual Handling - Employee)	0	
Policy Hub	Cohort sync (Global - Employee)	7	

The Cohort association screen consists of **Course**, **Name**, **Users** and **Edit**

- Course – The course that users will be added to
- Name – The name of the cohort associated with that course
- Users – The number of users in that cohort
- Edit – Tools to delete or hide the association (both of which will remove the users in that cohort from the course)

3. Click on the **Add** link at the top of the table
4. In the **Cohort** drop-down, select the name of the cohort we would like to associate the course with. In this example we will use ‘Fire and Driver Safety’

5. In the Course drop-down select the course we would like to associate the cohort with. In this example we have chosen ‘Fire Safety’
6. Click on the **Add method** button
7. In this example, as we would like members of the ‘Fire and Driver Safety’ cohort to have access to both the Fire Safety and Driver Safety Awareness training we would need to repeat steps 3 to 6 choosing the ‘Driver Safety Awareness’ course at step 5



Add

Course	Name	Users	Edit
Display Screen Equipment	Cohort sync (Global - Employee)	7	
Driver Safety Awareness	Cohort sync (Fire and Driver Safety - Employee)	0	
Fire Safety	Cohort sync (Global - Employee)	7	
Fire Safety	Cohort sync (Fire and Driver Safety - Employee)	0	
Manual Handling	Cohort sync (Global - Employee)	7	
Manual Handling	Cohort sync (Manual Handling - Employee)	0	
Policy Hub	Cohort sync (Global - Employee)	7	

The new associations are now listed on the Cohort associations screen and users that are added to the ‘Fire and Driver Safety’ cohort will be enrolled on the ‘Fire Safety’ and ‘Driver Safety Awareness’ courses.

Managing licenses

You have purchased a certain number of licenses to enroll user on courses on the Enterprise platform.

If you exceed the allotted number of licenses, you will need to pay to enroll more users on courses.

However, you can reduce the number of licenses used by making users inactive when they leave your company, without losing data about the courses they've completed.

The instructions below will let you know how to manage your licenses effectively so that you get the best possible value from the platform.

- To view your license usage, select **Licenses** on the administration block to view the following information (figure 1):

Licenses

Course	Used	To use
Display Screen Equipment	7	50
Fire Safety	7	50
Manual Handling	7	50

- In this example, the organisation has paid for 50 licenses for each of three courses. They have used seven of each, so have 43 remaining for each course.
- Looking at this screen you can easily keep track of license usage – but remember that the number on the right does not automatically go down as you use licenses. You'll need to subtract the number of "Used" licenses from the number "To use" in order to determine how many you have left.
- Each user can only take up one license for each course. Even if they re-take the course multiple times, they will only use one license.

Active and inactive users

- Active users can log on to the platform, take courses and receive email notifications. Active users also use one license for each of the courses onto which they are enrolled.
- Inactive users cannot log onto the platform, take courses or receive email notifications.
- Inactive users' data is retained, but they do not use licenses. So, if someone leaves your organization, you can free up a license, but retain all the data relating to their courses. This could be useful if you need to refer to their course completion or self-assessment data in the event of an enquiry, or possible legal issue.

Making a user inactive

- To make a user inactive, go to **Administration > Users > Browse List** and search for their name.
- Click on **Active** and the user will immediately be made inactive, and no longer use licenses for any courses on which they are enrolled. (See figure 2).

First name / Surname	Email address	City/town	Last access	Edit	Status
Edgar Allen Poe	kerry.britsafe+kftrain-emp1@gmail.com	London	1 day 5 hours	Edit	Active
George Orwell	kerry.britsafe+kftrain-emp2@gmail.com	London	1 day 5 hours	Edit	Active
Jane Austen	kerry.britsafe+kftrain-emp3@gmail.com	Edinburgh	15 days 2 hours	Edit	Active
Leo Tolstoy	kerry.britsafe+kftrain-mng2@gmail.com	Edinburgh	126 days 6 hours	Edit	Active
Mary Shelley	kerry.britsafe+kftrain-emp4@gmail.com	Edinburgh	113 days 3 hours	Edit	Active
Oscar Wilde	kerry.britsafe+kftrain-admin1@gmail.com	Dublin	now	Edit	Active
Sylvia Plath	kerry.britsafe+kftrain-mng1@gmail.com	London	11 days 6 hours	Edit	Active

- If you make a user inactive in error, don’t worry! Just click again on **Inactive** and they will immediately become active again – all their data will be unaffected.

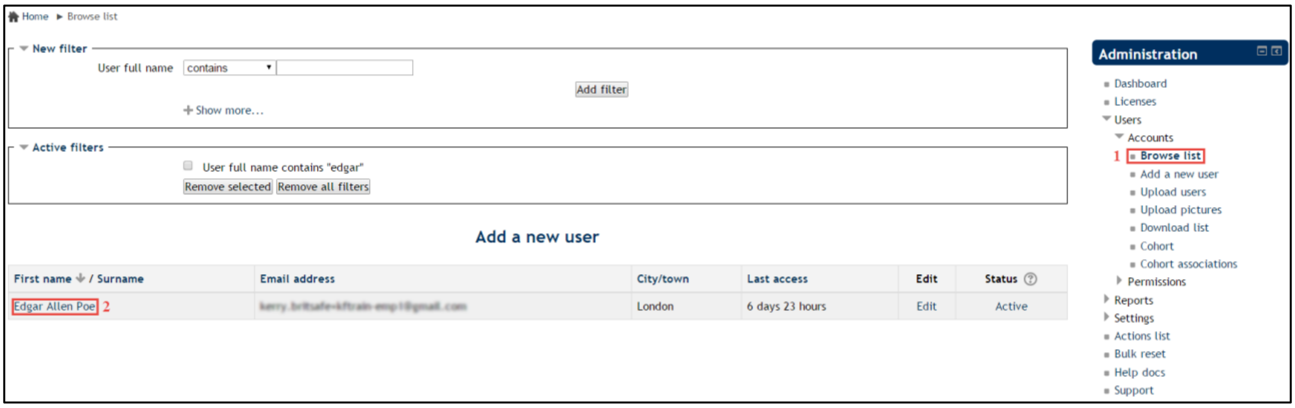
If you think you are going to run out of licences and need to purchase more, please contact your British Safety Council account manager.

Login as another user

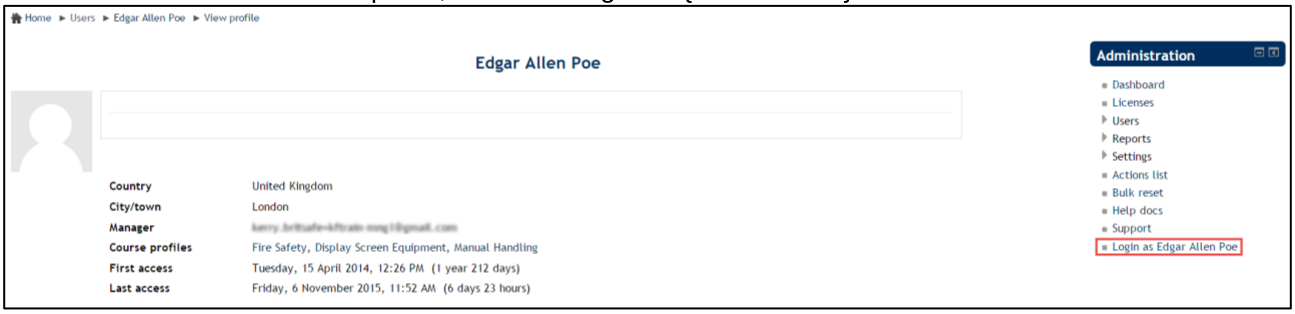
When a user asks for assistance or reports a problem with the site, it may help to view and interact with the site from that user's perspective. It is therefore possible for users with the 'Company admin' role to log in as another user (without knowing that user's logon credentials).

How-to

1. In the 'Administration' panel Navigate to the **Browse List** section under **Users** Click the **+Show more** button (if all options are not shown), select/input the required filters and click the **Add filter** button to find a specific user's record.
2. Click the user's name to view their profile.



3. In the 'Administration' panel, click the 'Login as {user's name}' link



4. Click the 'Continue' button. You will be taken to the user's dashboard and every interaction with the site thereafter will be from the user's perspective.
5. To return to your own view, click your name in the top-right corner (or the 'logout' link) to log out, then log in again.

Reports

Reports are used to monitor compliance and access self-assessment resolution tools. They are available on the dashboard and in the ‘Administration’ panel of a user with the ‘Company admin’ or ‘Company manager’ role. By default, reports are automatically restricted to the records of users assigned to the logged-in user with the ‘Company manager’ role, while users with the ‘Company admin’ role can run reports against the records of all users. Reports can be further filtered to drill down to specific data that may be reviewed on screen or exported to a CSV file.

There are two types of reports: Quick reports & Standard reports

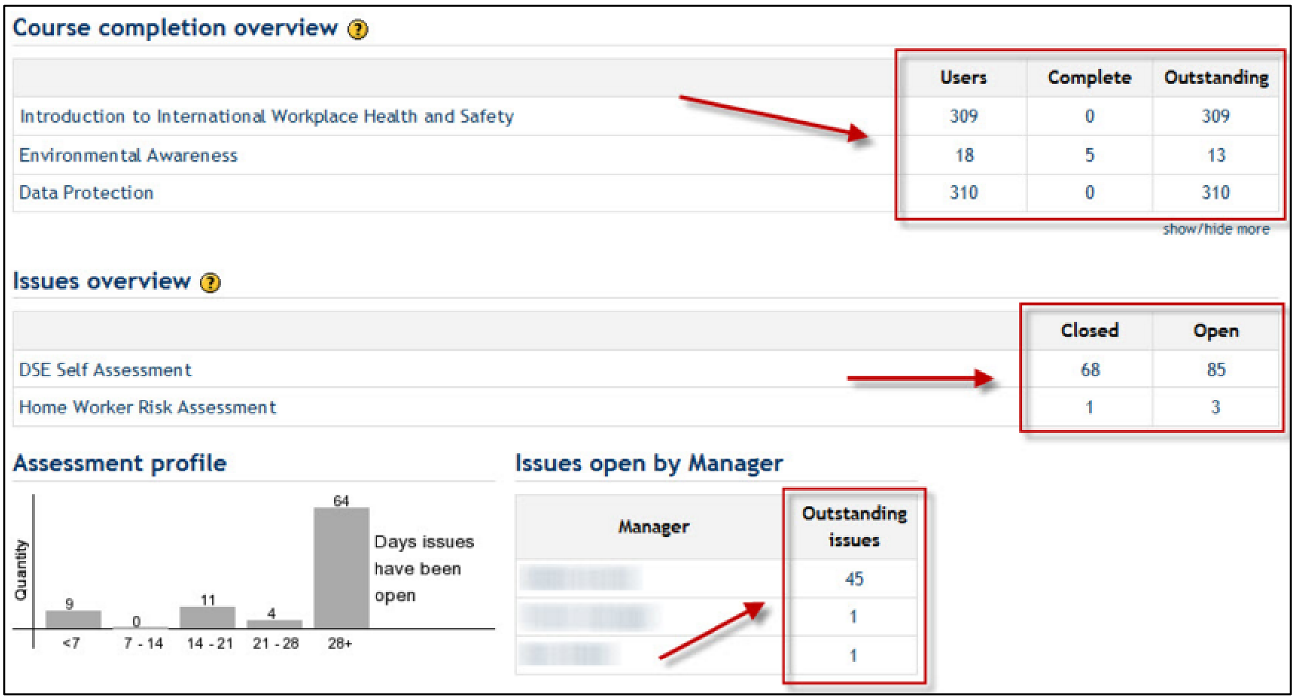
Quick reports

‘Quick reports’ are a collection of reports already pre-set with the most popular filters:

- Users enrolled in a particular course
- Users who have completed a particular course
- Users who have not completed a particular course
- The number of open and closed issues in a particular self-assessment
- The number of open self-assessments by manager (users with ‘Company Admin’ role only)
-

To run a ‘quick report’, go to the 'user dashboard' and click the respective link.

NOTE: A ‘quick report’ runs a standard report but with the most popular filters already applied. These filters may be adjusted within the report to expand or narrow results.



Standard reports

These reports are available in the 'Administration' panel.

How to run a report:

1. In the ‘Administration’ panel click ‘Reports’
2. Click the name of a report
3. Click the 'Show more' button (if all options are not shown) and select/input filters to narrow down the result as required
4. Click the ‘Submit’ button to display the report on screen or the ‘Export’ button to download the report data to a CSV file

Available reports:

Course completion: A list of users and their completion status of the selected courses.

Learning package: A list of users and their completion status of the training activity of the selected courses. A score of 1 indicates that the user has completed the training activity. A score of 0 indicates that the user has started but not yet completed the training activity.

Quiz grades: A list of users, their completed quiz attempts and associated grades achieved in the quiz activity of the selected courses.

Quiz breakdown: A list of users, the questions asked in the quiz activity of the selected course and the responses given by each user.

Self-assessment – overview: A list of users, the questions asked in the self-assessment activity of the selected courses, if the responses given generated risks and the status of those risks.

Self-assessment – attempt: A list of users, their completed attempts of the self-assessment activity in the selected courses, their level of compliance and risk resolution status.

Self-assessment – grid: A grid of users, the questions asked in the self-assessment activity of the selected course, and if the responses given generated risks. NOTE: This report immediately downloads to a CSV file.

Self-assessment – comments: A list of users, the risks they raised in the self-assessment activity of the selected courses, and the respective resolution comments.

Self-assessment – status: A list of users, and their enrolment and completion status of the self-assessment activity of the selected courses.

Policy status: A list of users, the documents they are required to view and if they have done so.

Message history: A list of users and the system messages sent to them.

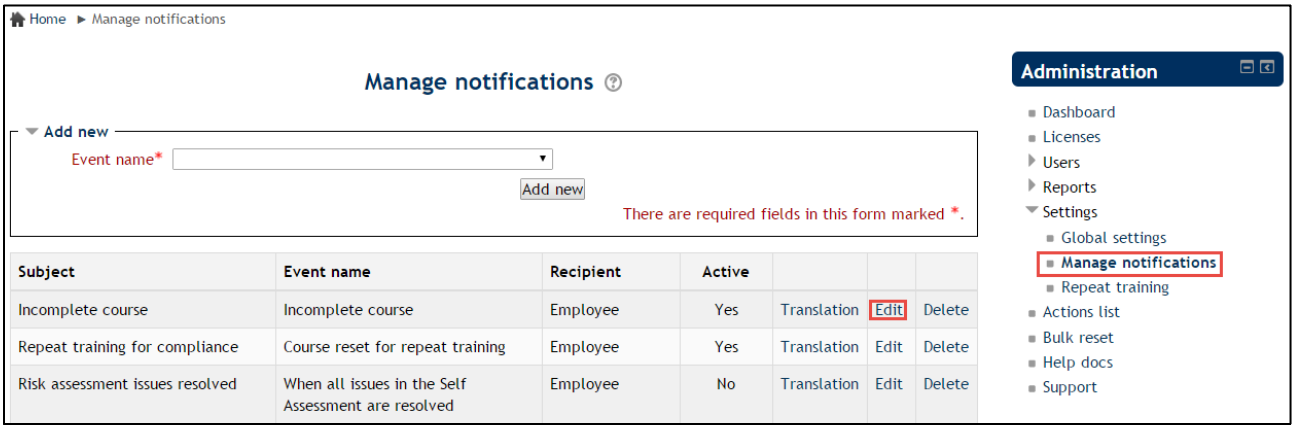
Managing Notifications

The built-in notification system sends e-mail messages to users when certain events occur, e.g. a user is required to complete a course; users have not completed a particular course within a specified time frame; etc.

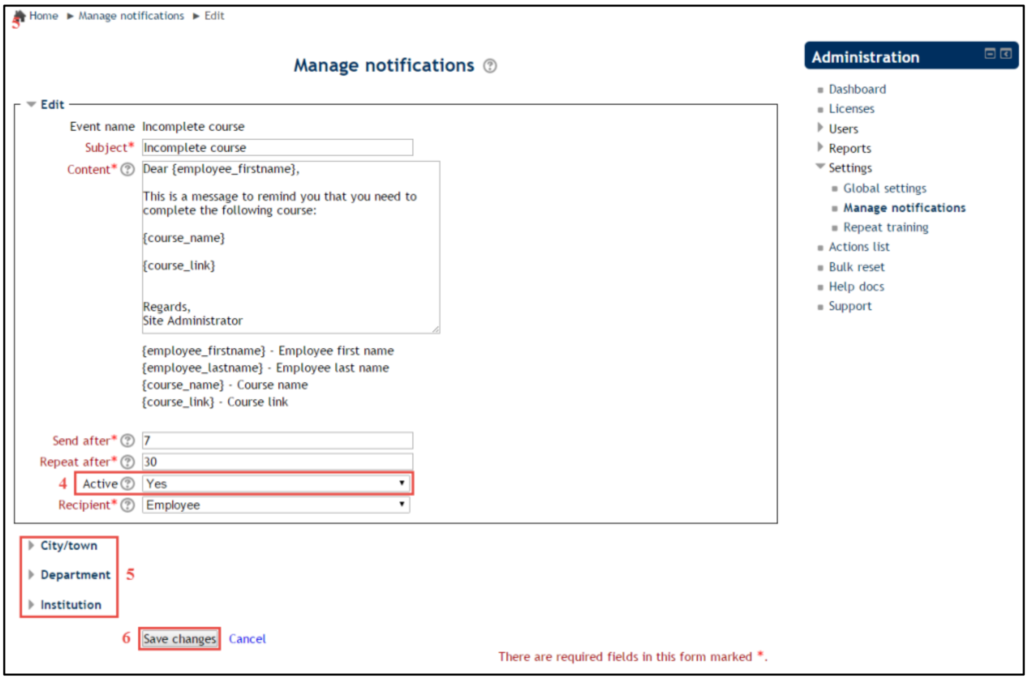
NOTE: A notification must be active in order to run.

How-to

1. In the ‘Administration’ panel navigate to the **Manage notifications** link, this page will show you which notifications you have set up on your platform and which are active or not.
2. Click the ‘Edit’ link across from the notification to edit any existing notifications that you wish to change.



3. Customise the notification as required
4. Select ‘Yes’ from the ‘Active’ field drop down menu to activate the notification, or ‘No’ to deactivate the notification
5. You can also select to send different notifications to users in different places, departments and Institutions by expanding the field and selecting the required instances.



6. Click the **Save changes** button

Notification Settings

Each notification has a combination of the following settings.

- **Subject**: This text will appear in the subject of the recipient's e-mail message. Use information that is descriptive but concise.
- **Content**: This text will appear in the body of the recipient's e-mail message and can have content placeholders that are automatically replaced by information specific to the recipient when the message is generated by the system.
- **Send after**: Set this to the number of days that the first message should be sent after a user is enrolled to complete the course.
- **Repeat after**: Set this to the number of days that should pass before the message is re-sent and thereafter repeated until the user has completed the course in which they are enrolled.
- **When to send**: Set this to the day of the week that the notification should run.
- **Days overdue**: Set this to the number of days that a course completion is overdue after a user is enrolled to complete the course.
- **Active**: 'Yes' indicates that the notification is active and will run. 'No' indicates that the notification will not run.
- **Recipient**: This setting is the type of user that should be targeted.

Additional support

The British Safety Council is committed to providing an excellent level of customer service. For additional help and support, administrative users of the Health & Safety e-Learning platform may contact our Technical Support team by logging a ticket at https://support.britsafe.org/ Please ensure that you include the url of your platform, this will help our support officers to more quickly resolve your issues.