

# INEIGHT U

## POWER USER GUIDE



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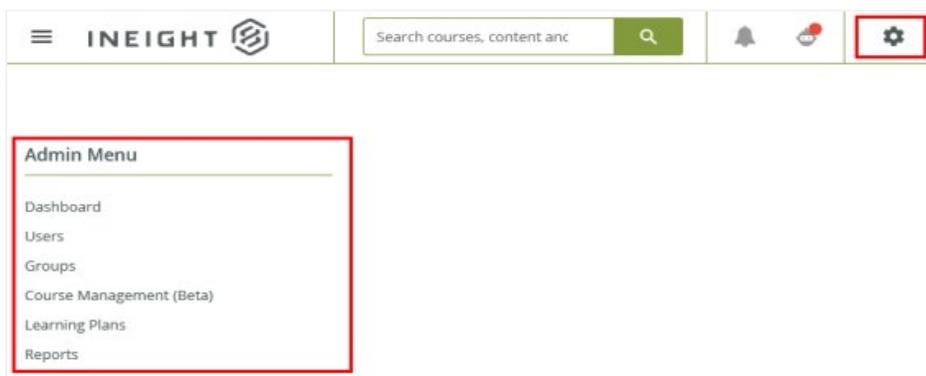
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# CHAPTER 1

## ADMIN MENU

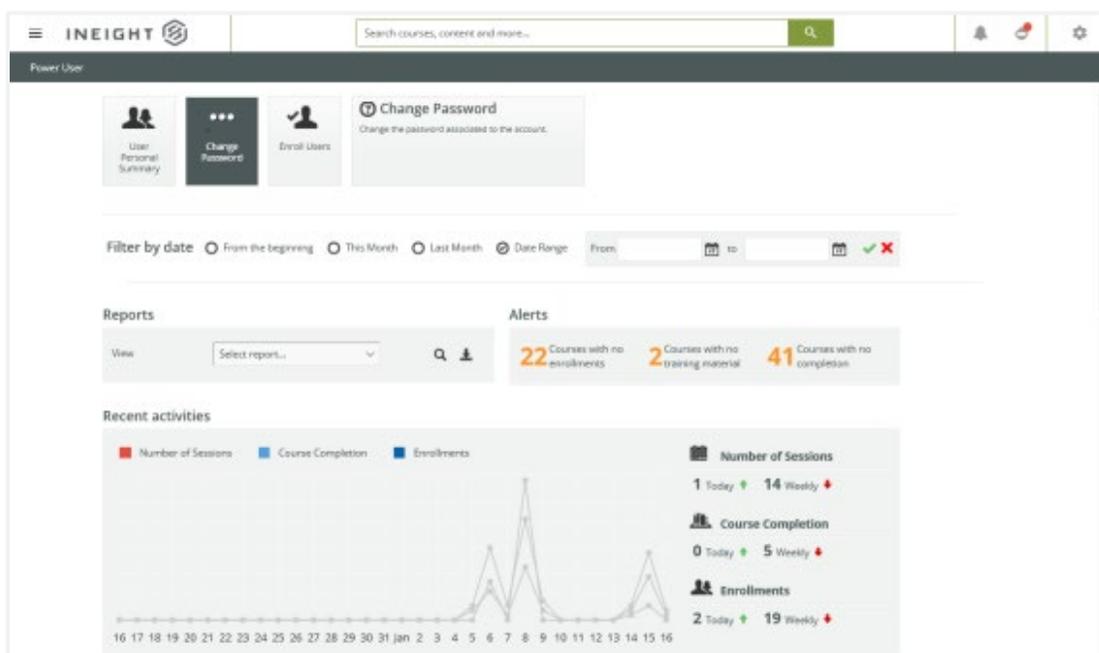
This short guide covers how you can quickly get started using InEight University as a Power User. Before viewing this guide, please complete the [InEight U Power User Essentials Course](#), which is a prerequisite to being made a Power User.

Power Users gain access to a number of additional administrative functions and have greater autonomy than normal users. As a Power User, you will gain access to the [Admin Menu](#), which can be opened by clicking the [Settings icon](#) in the top right corner of the screen.



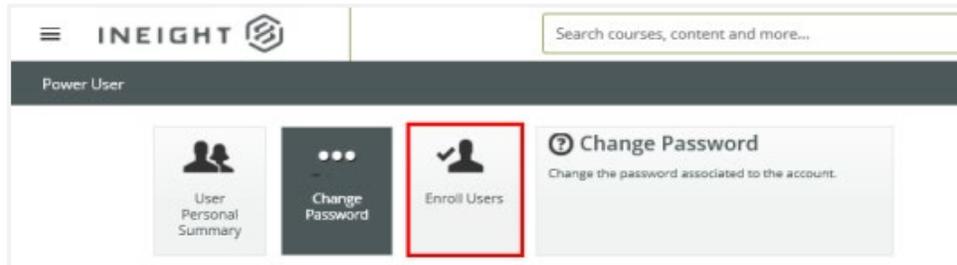
### 1.1 DASHBOARD

The dashboard provides you with user statistics and provides access to some of the platform's most common actions. To access it, select [Dashboard](#) in the Admin Menu.

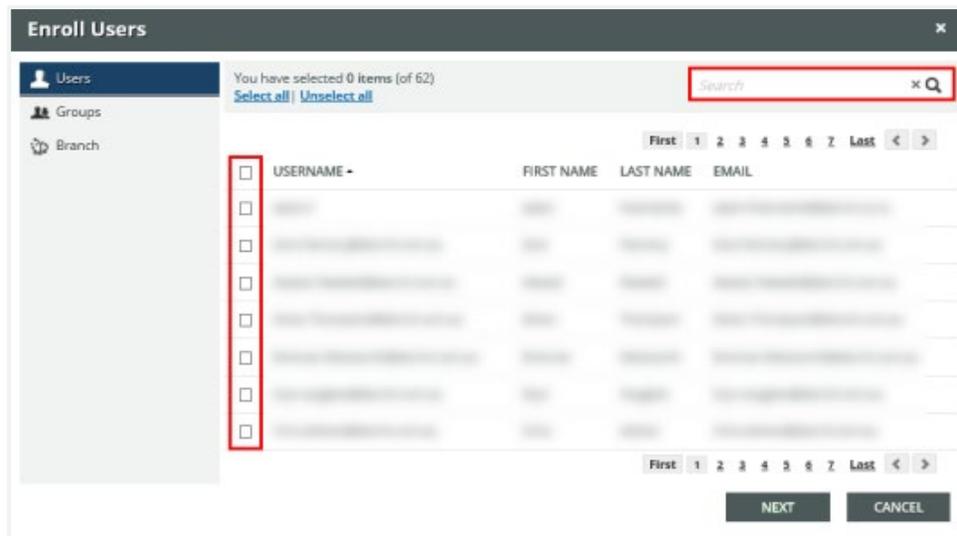


## 1.1.1 ENROLLING USERS INTO A COURSE

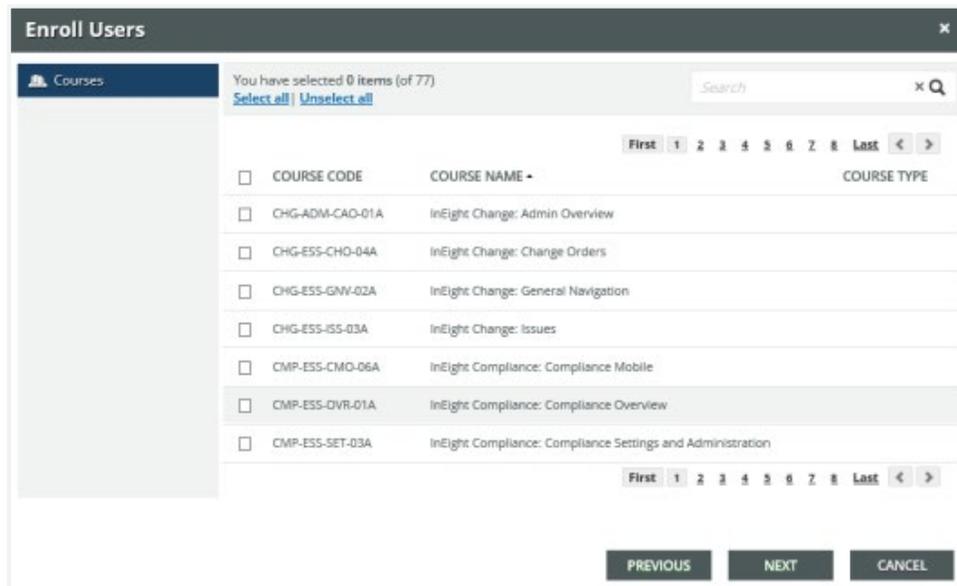
To add users into one or multiple courses, click the **Enroll Users** button.



Select the users you want to enroll. You can also search for users if required.



Select the required courses to enroll the users into.



Select the level as  and set enrollment deadlines if required.

**Select the level for the user selected**
✕

You are about to enroll **1 user(s)** in **2 courses**

---

Level

Set enrollment deadlines  
Leave blank for no deadline

Active from

Active until

PREVIOUS
CONFIRM
CANCEL

### 1.1.2 VIEWING REPORTS

To view a report, select the required report from the drop-down menu.

#### Reports

View

Select report...

- Users - Courses
- Users - Course Enrollment Time
- Users - Learning Objects
- Courses - Users
- Groups - Courses
- Users - Learning Plans

#### Recent activities

Click the  to view the report.

To export the report, select the required format from the drop-down menu.

**INEIGHT**

Search courses, content and more...

← Reports

Export

- Choose an action
- Export as XLS
- Export as CSV
- Export as HTML

← BACK

USERNAME	FULL NAME	COURSE TYPE	COURSE NAME	CATEGORY	START DATE	DATE END	COMPLETION DATE	LAST ACCESS DATE	NUMBER OF SESSIONS	COURSE PROGRESSION
...	...	E-Learning	<b>Intight Change Charge Orders</b>	Capital & Contract Management (CCM)					0	0%
...	...	E-Learning	<b>Intight Contract Payments Management</b>	Capital & Contract Management (CCM)			12/4/2019 4:00 pm		0	66%
...	...	E-Learning	<b>Intight Estimate Calculators</b>	Project Cost Management (PCM)			10/7/2019 3:00 pm		0	100%
...	...	E-Learning	<b>Intight Estimate Cost</b>	Project Cost			10/7/2019 3:00 pm		0	100%

## CHAPTER 2

# CUSTOM AND SUMMARY REPORTS

As a Power User, it is possible to create custom and summary reports to view and analyze specific information about a user, course or learning asset.

### 2.1 QUICK SUMMARY REPORTS

To generate a summary report, click the and select . Select the required report and type in the name of the course or user.

Select to create the report.

Metric	Value
Users that have completed the course within 30 days from enrollment	50%
Enrolled users	2
Days since launch	155
Training Material	1

Status	Count	Percentage
TO BEGIN	1	50%
IN PROGRESS	0	0%
COMPLETED	1	50%

You can also or if required.

## 2.2 CREATING CUSTOM REPORTS

To generate a custom report, click the and select  
Select

The screenshot shows a 'Reports' interface. At the top left, there is a button with a document icon and the text 'Create Custom Report', which is highlighted with a red rectangular box. Below this button is a search bar with a dropdown menu set to '(All)' and a search input field with a magnifying glass icon. Below the search bar is a table with the following columns: NAME, CREATED BY, CREATION DATE, FILTERS, and SCHEDULED. The table contains six rows of report data.

NAME	CREATED BY	CREATION DATE	FILTERS	SCHEDULED
Users - Courses			Public: All users, groups and branches	🔍 📄 ⋮
Users - Course Enrollment Time			Public: All users, groups and branches	🔍 📄 ⋮
Users - Learning Objects			Public: All users, groups and branches	🔍 📄 ⋮
Courses - Users			Public: All users, groups and branches	🔍 📄 ⋮
Groups - Courses			Public: All users, groups and branches	🔍 📄 ⋮
Users - Learning Plans			Public: All users, groups and branches	🔍 📄 ⋮

Select the type of custom report that you want to create and click

**Create Custom Report**
✕

**Name**

**User Reports**

- Users - Courses
- Users - Course Enrollment Time
- Users - Learning Objects
- Courses - Users
- Groups - Courses
- Users - Learning Plans
- User - Session
- Users - Certifications
- Users - External Training

**App Reports**

- Certifications - Users

**Coach & Share Reports**

- Assets - Statistics
- Experts - Activity
- Channel - Statistics
- User - Contributions

NEXT
CANCEL

Select the users that you want to appear in the report. The easiest way of doing this is by clicking and then selecting your company name. This will ensure that new user data will automatically appear in future reports.

**Create Custom Report**
✕

- Users
- Groups
- Branch

You have selected 0 Items (of 1)

[Select all](#) | [Unselect all](#)

<input type="checkbox"/>	NAME	DESCRIPTION
<input checked="" type="checkbox"/>		Automatically assigned user group for

PREVIOUS
NEXT
CANCEL

Select the courses for the report and click .

### Create Custom Report

Apply this report to all courses or select custom courses

All courses  
This option will include present and future courses.

Select Courses

PREVIOUS NEXT CANCEL

Select any filters that you want to apply to the report.

### Edit

If you view or export a report with 170000 lines or more, the platform may or may not display the report properly. Please try splitting the report into smaller reports.

**Filter By**

<p><b>Enrollment Date</b></p> <p><input checked="" type="radio"/> Any</p> <p><input type="radio"/> &gt; <input type="text"/> days ago</p> <p><input type="radio"/> Date Range</p>	<p><b>Completion Date</b></p> <p><input checked="" type="radio"/> Any</p> <p><input type="radio"/> &gt; <input type="text"/> days ago</p> <p><input type="radio"/> Date Range</p>
---	---

All of the above conditions must be satisfied

At least one of the above conditions must be satisfied (the "Any" value is not considered as a condition)

**Enrollment Status**

All  Not Started  In Progress  Completed

Course(s) expiring in  day(s)

Course expiring before

PREVIOUS NEXT CANCEL

Scroll down and select the fields that you would like to include in the custom report and click

**Edit**
✕

**Select**

<p><b>User Fields</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> User unique ID</li> <li><input checked="" type="checkbox"/> First Name</li> <li><input checked="" type="checkbox"/> Last Name</li> <li><input checked="" type="checkbox"/> Full Name</li> <li><input checked="" type="checkbox"/> Email</li> <li><input type="checkbox"/> Creation date</li> <li><input checked="" type="checkbox"/> User last access date</li> <li><input type="checkbox"/> Deactivated</li> <li><input type="checkbox"/> Suspension Date</li> <li><input type="checkbox"/> Expiration</li> <li><input type="checkbox"/> Email Validation Status</li> <li><input type="checkbox"/> Branches</li> <li><input type="checkbox"/> Country</li> <li><input type="checkbox"/> Company/University</li> </ul>	<p><b>Course Fields</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Course Unique ID</li> <li><input type="checkbox"/> Course Category</li> <li><input checked="" type="checkbox"/> Category Code</li> <li><input type="checkbox"/> Code</li> <li><input type="checkbox"/> Status</li> <li><input type="checkbox"/> Credits (CEUs)</li> <li><input checked="" type="checkbox"/> Start Date</li> <li><input checked="" type="checkbox"/> End Date</li> <li><input checked="" type="checkbox"/> Course Type</li> <li><input type="checkbox"/> Course ID</li> <li><input type="checkbox"/> Course duration</li> <li><input type="checkbox"/> Expired</li> </ul>	<p><b>Enrollment Fields</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Level</li> <li><input type="checkbox"/> Subscription date</li> <li><input type="checkbox"/> First access date</li> <li><input type="checkbox"/> Last Access Date</li> <li><input checked="" type="checkbox"/> Completion Date</li> <li><input checked="" type="checkbox"/> Status</li> <li><input checked="" type="checkbox"/> Active from</li> <li><input type="checkbox"/> Active until</li> <li><input checked="" type="checkbox"/> Final score</li> <li><input type="checkbox"/> Initial score</li> </ul> <p><b>Statistics</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Number of Sessions</li> <li><input checked="" type="checkbox"/> Course Progression</li> <li><input checked="" type="checkbox"/> Session Time</li> <li><input type="checkbox"/> Time in Webinar Sessions</li> </ul>
---	--	--

PREVIOUS
NEXT
CANCEL

Use the drop-down menu to select how the custom report will be ordered.

**Edit**
✕

If your report exceeds 2000 rows, the sort order will be ignored.

**Order by**

Username
▼

Select field

**User**

- Username
- First name
- Last name
- E-mail
- User last access date

**Course**

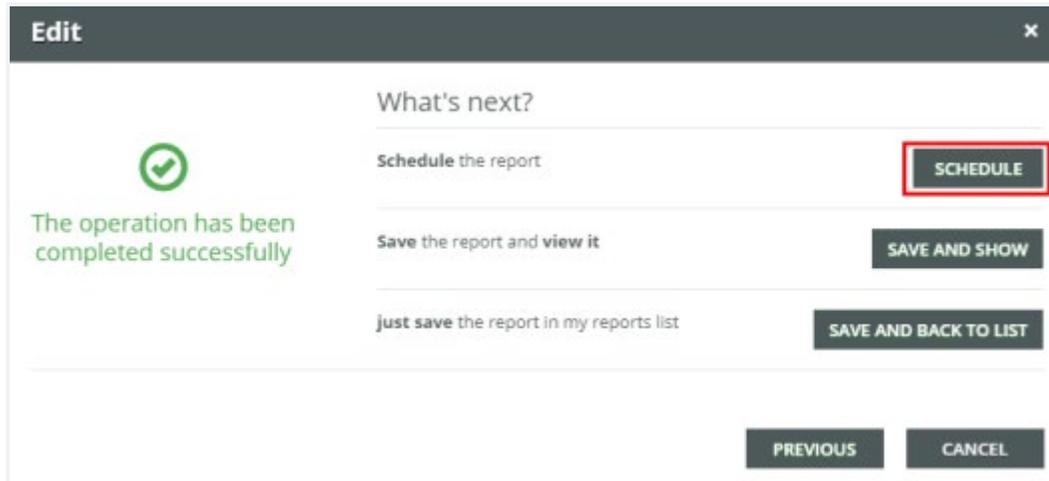
- Course Name
- Start Date
- Date end
- Course Type

**Enrollment**

- Completion Date
- Status
- Enrollment start of validity
- Final score

CANCEL

Use the report function to automatically generate the report at routine intervals and receive it via email.



**Edit** [X]

 The operation has been completed successfully

What's next?

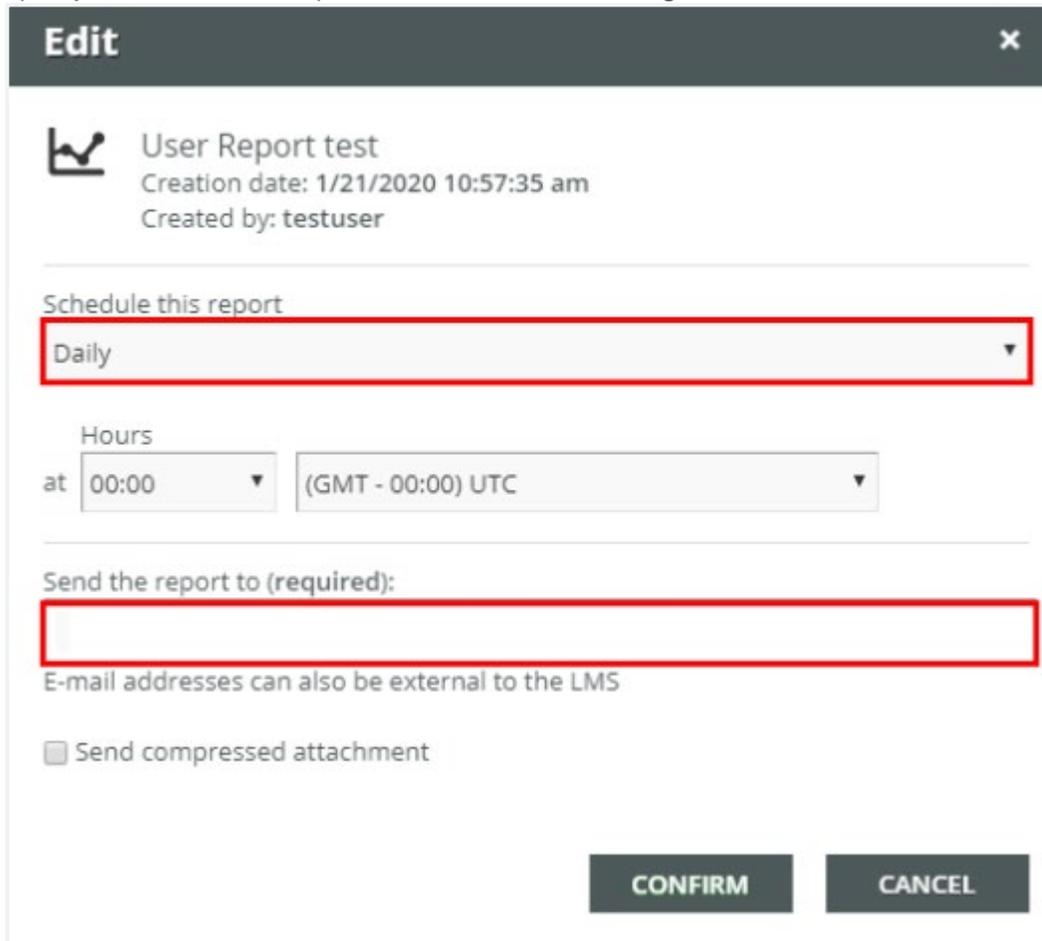
Schedule the report **SCHEDULE**

Save the report and view it **SAVE AND SHOW**

just save the report in my reports list **SAVE AND BACK TO LIST**

**PREVIOUS** **CANCEL**

Specify an interval for the report and email address for it to go to.



**Edit** [X]

 **User Report test**  
Creation date: 1/21/2020 10:57:35 am  
Created by: testuser

Schedule this report

Daily

Hours  
at 00:00 (GMT - 00:00) UTC

Send the report to (required):

E-mail addresses can also be external to the LMS

Send compressed attachment

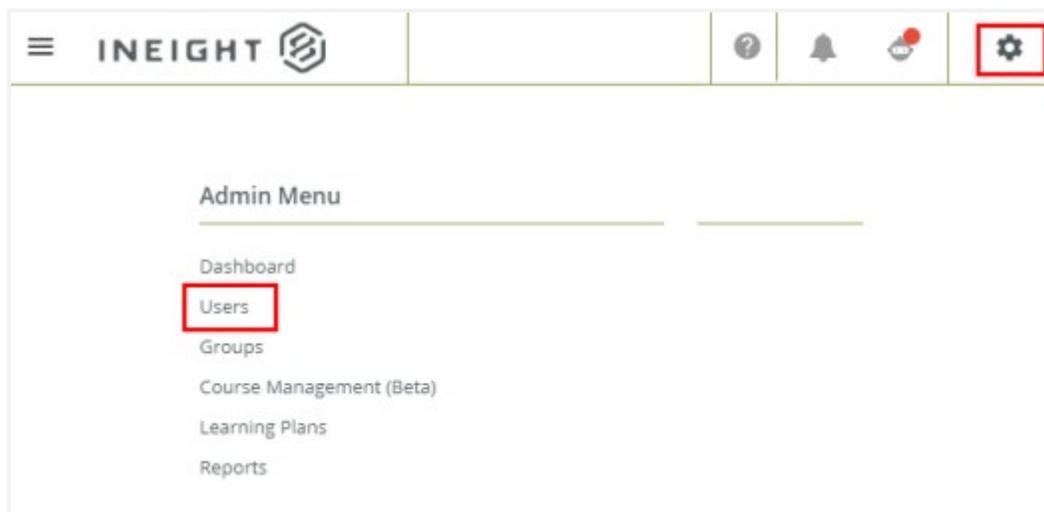
**CONFIRM** **CANCEL**

# CHAPTER 3

## USER MANAGEMENT

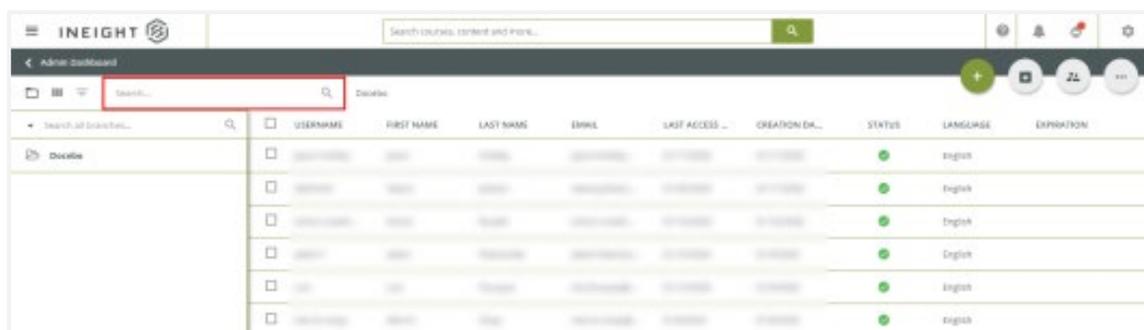
### 3.1 CREATING A USER

To create a new user, log in as a power user and open the [Admin Menu](#) by clicking the [gear icon](#)

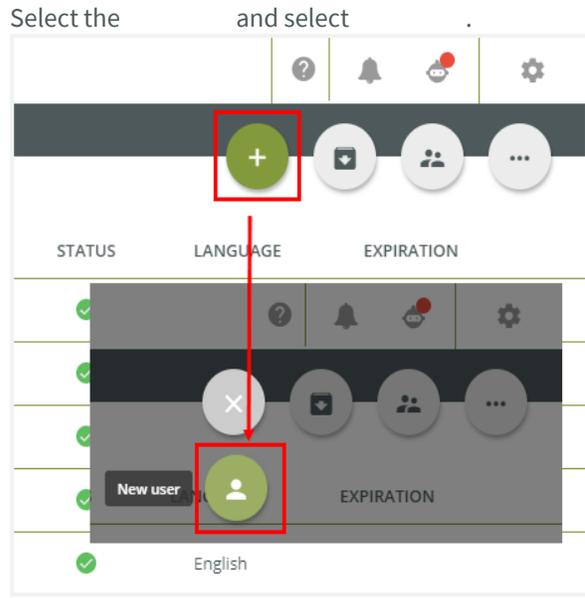


Select [Users](#) from the Admin Menu.

Here you will see a list of existing users from your company on the system. Use the [Search](#) field to search for the user's full name to check if they already have a registered account.



If there is no existing account, select [Add User](#) from the admin menu to create one.



In the slide out panel, enter in the user information. Required fields will be marked with an asterisk (\*).

### New User

In order to create a new user, please complete all of the following steps.

1 General Information — 2 Branches — 3 Additional Fields — 4 Team Members

Please provide the information for the user you're going to create

**User Information**

<b>Username *</b> johnsmith@ineight.com	<b>Level</b> User
<b>Email</b> johnsmith@ineight.com	<b>Email Validation Status</b> Unverified
<b>First Name</b> John	<b>Last Name</b> Smith
<b>New password *</b> .....	<b>Retype Password *</b> .....

Force users to change their password at their first login

**User Status**

Expiration 

Activate user at the end of the creation process

Send User has been created (by administrator) notification to new user.

Send the 'User has been created (by administrator)' notification upon creating the user. This notification must already be configured and activated in the Notification App

**NEXT** **CANCEL**

Ensure all 3 options on the bottom of the user creation screen are selected and click .

Select a company branch if required and then click **Next**.

×

## New User

In order to create a new user, please complete all of the following steps.

✓ General Information
2 Branches
3 Additional Fields
4 Team Members

Assign the user to a branch of the organization chart by selecting an item below

0 items Selected

▼ Search all branches... 🔍

📁 Docebo

1 - 0 of 0

PREVIOUS

NEXT

CANCEL

These fields should be pre-populated with your company's details. If not, enter in the **Country** and **Company/University** and click **Next**. It is important to enter in the correct company name for reporting purposes.

×

## New User

In order to create a new user, please complete all of the following steps.

✓ General Information
✓ Branches
3 Additional Fields
4 Team Members

Fill in the additional fields:

Country \*

-

This field is required

Company/University \*

Company Name

PREVIOUS

NEXT

CANCEL



If required, specify the user's  or  that they manage by checking the  option and then click . This section can be skipped completely.

### New User

In order to create a new user, please complete all of the following steps.

General Information —  Branches —  Additional Fields — **4** Team Members —  Review

Please select all of the team members of the user you're creating.

**Manager Information**

Direct Manager

This user manages a team

**Team Members (as Direct Manager)**

Please select all of the team members of the user you're creating.

Type here...

[PREVIOUS](#) [CREATE USER](#) [REVIEW](#) [CANCEL](#)

To complete user creation, click . You can also select  to double check the user details you have entered.

### New User

In order to create a new user, please complete all of the following steps.

General Information —  Branches —  Additional Fields —  Team Members — **5** Review

From here, you can fully review your user and decide if the information is correct, or if something needs to be edited.

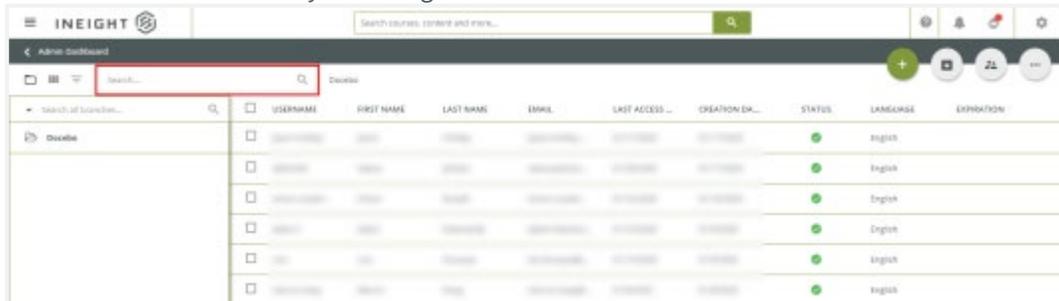
<b>General Information</b> <a href="#">Edit</a>	<b>Additional Fields</b> <a href="#">Edit</a>
Username: johnsmith@ineight.com Email: johnsmith@ineight.com First Name: John Last Name: Smith Level: [object Object] Language: english Expiration: Email Validation Status: Unverified Date format: en Time Zone: 0	Country: AUSTRALIA Company/University: Company Name
<b>Branches</b> <a href="#">Edit</a>	<b>Organization</b> <a href="#">Edit</a>
	Direct Manager:

[PREVIOUS](#) [CREATE USER](#) [CANCEL](#)

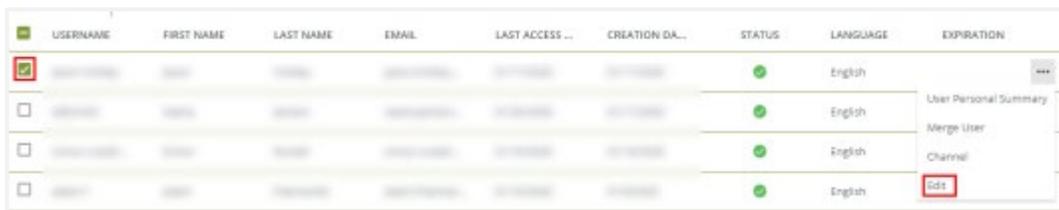
### 3.2 EDITING A USER

To edit an existing user's account, select **Users** from the Admin Menu.

Locate the user's account by searching for their name.



click the **checkbox** next to the user and click the **More** icon at the end of the user's row and select



Update the user's information as required and when done, click



### Edit User

In order to create a new user, please complete all of the following steps.

1 General Information — 2 Branches — 3 Additional Fields — 4 Team Members

Please provide the information for the user you're going to create

**User Information**

Username \*  Level

Email  Email Validation Status

First Name  Last Name

New password  Retype Password

Force users to change their password at their first login

**User Status**

Expiration

**User Preferences**

Use this area to configure user preferences

Language  Date format

**UPDATE** **NEXT** **CANCEL**



## CHAPTER 4

# FREQUENTLY ASKED QUESTIONS

### CAN INEIGHT CREATE OR ENROLL USERS FOR OUR COMPANY?

No, we encourage all users to create their own account and self-enroll. If required, a company Power User can be set up (after completing mandatory online training) with the ability to create and/or enroll users into courses.

### WHAT IF A USER ENTERS THE WRONG DETAILS WHEN REGISTERING THEIR ACCOUNT?

Users can update their account details after creating and signing into their account. To update account details, select the [Account Settings](#) link in the top right corner and then the [Profile](#) tab.



If you are unable to log into your account to do this, the primary Power User from your company may be able to help, or contact [InEightU@InEight.com](mailto:InEightU@InEight.com)

### HOW WILL OUR USERS KNOW WHICH COURSES TO ENROLL IN?

We recommend sending your users an email with links to any certifications they should enroll in. This will allow the user to click on the course links and self-enroll. Users also have the ability to self-enroll into courses by using the top search bar. For more information or to request an email template with a list of course links, contact [InEightU@InEight.com](mailto:InEightU@InEight.com).

### HOW CAN I MONITOR THE COURSE PROGRESS OF OUR USERS?

It is possible to monitor the progress of your users by running custom reports. Custom reports allow you to filter by:

- Enrollment date
- Completion date
- Enrollment status
- Course expiration date



### **HOW MANY POWER USERS CAN BE ALLOCATED TO US?**

Generally a single Power User can be allocated per company. If you require additional Power Users please contact your InEight representative with a case outlining why you need multiple Power User accounts.

### **WE WORK WITH A NUMBER OF SUBCONTRACTORS AND HAVE MULTIPLE COMPANY NAMES. HOW WILL THIS SHOW UP WHEN OUR POWER USER RUNS REPORTS?**

We recommend Power Users set up internal users, using a company name that contains a unique code that external users can also add to their company field when self-enrolling, so that Power Users can still have visibility of those users. Contact [InEightU@InEight.com](mailto:InEightU@InEight.com) for more information.

### **CAN WE INTEGRATE OUR LMS WITH INEIGHT U?**

No. We do not allow 3rd party integrations at this time for security and access policy reasons.



## **CHAPTER 5**

# **SUPPORT**

**HAVE A QUESTION THAT'S NOT COVERED IN THE GUIDE OR FAQ?**

Contact InEight U support - [ineightu@ineight.com](mailto:ineightu@ineight.com)