INEIGHT U
POWER USER GUIDE

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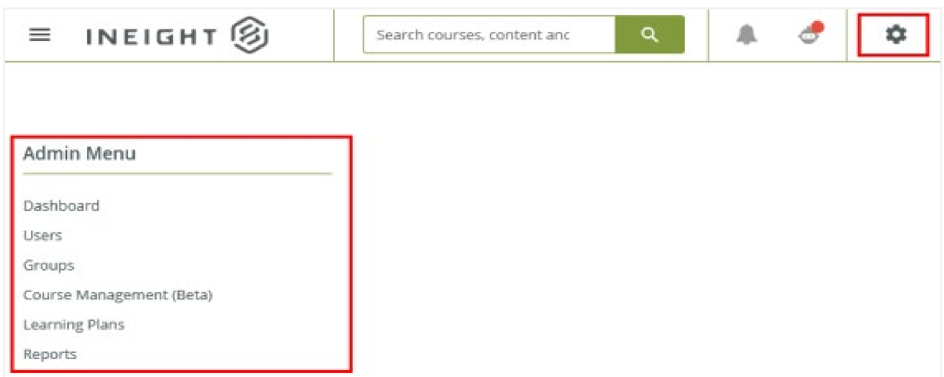
CHAPTER 1

ADMIN MENU

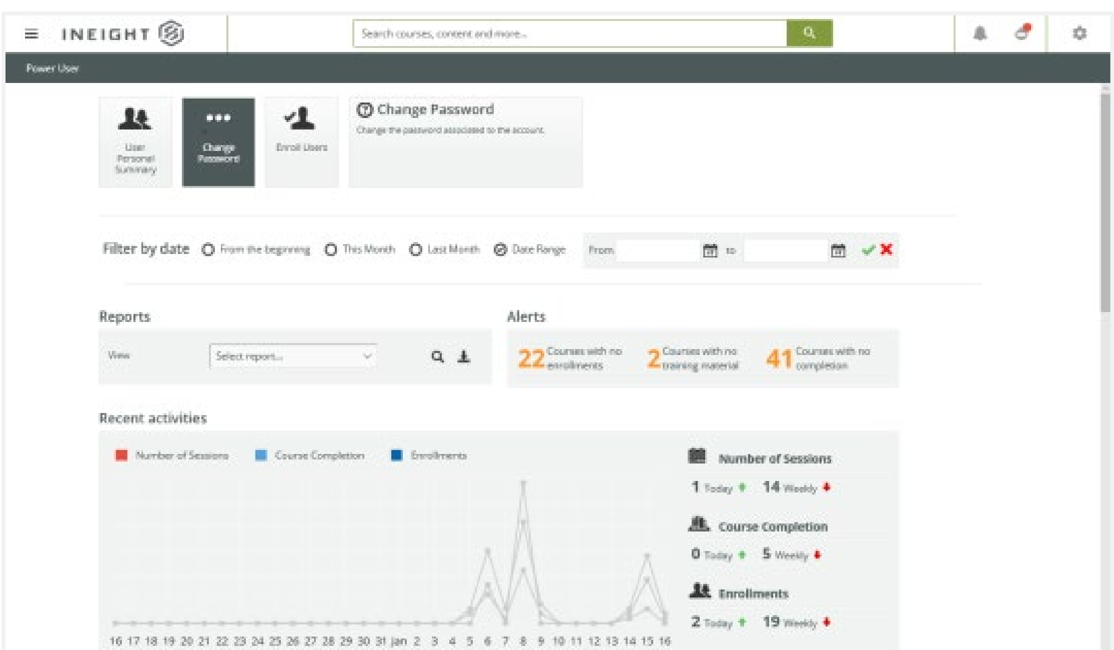
This short guide covers how you can quickly get started using InEight University as a Power User. Before viewing this guide, please complete the InEight U Power User Essentials Course, which is a prerequisite to being made a Power User.

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 , which can be opened by clicking the in the top right corner of the screen.



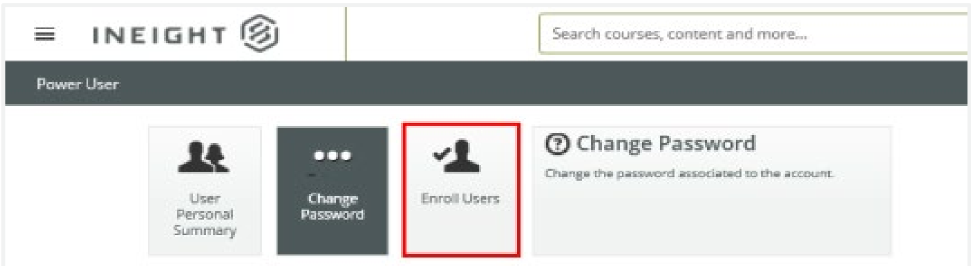
1.1 DASHBOARD

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

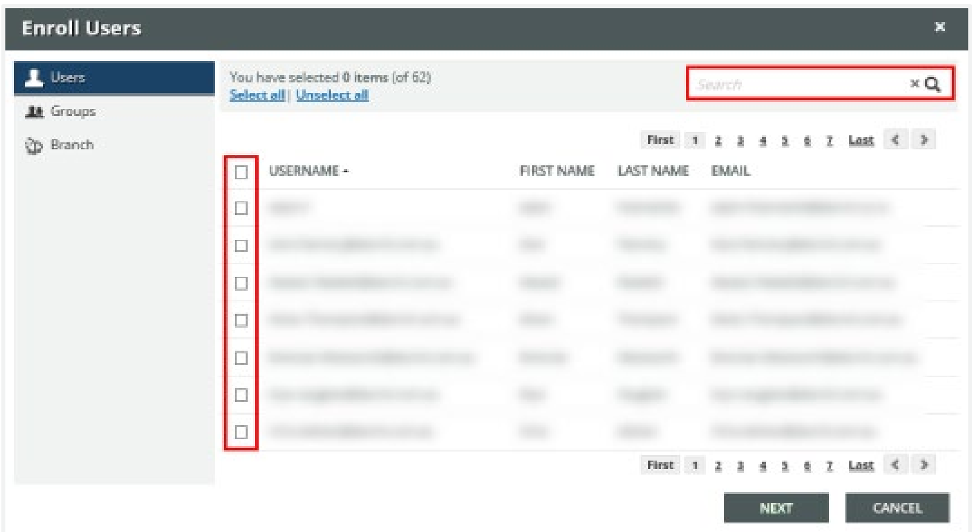


1.1.1 ENROLLING USERS INTO A COURSE

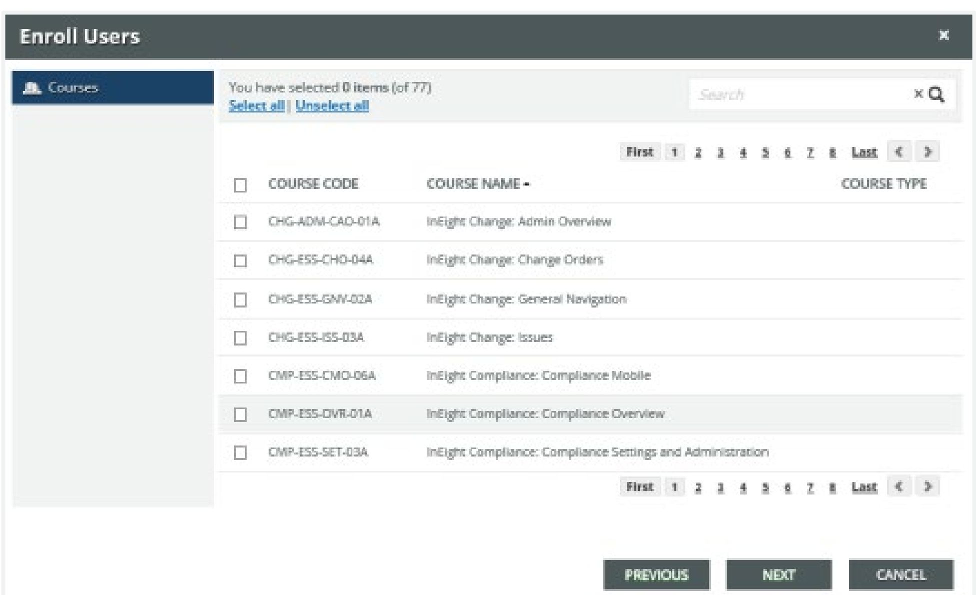
To add users into one or multiple courses, click the button.



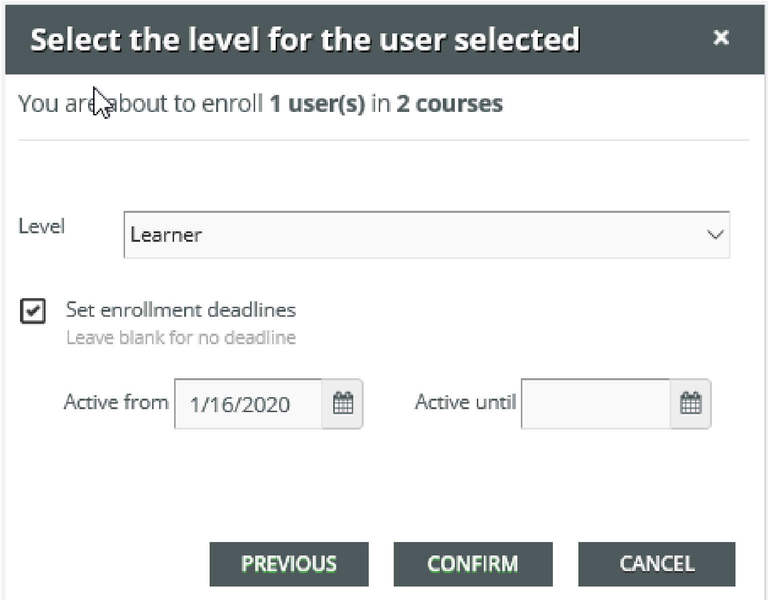
Select the users you want to enroll. You can also search for users if required.



Select the required courses to enroll the users into.

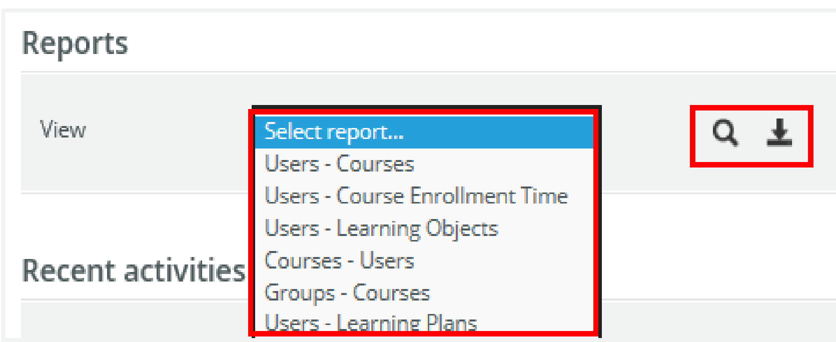


Select the level as and set enrollment deadlines if required.



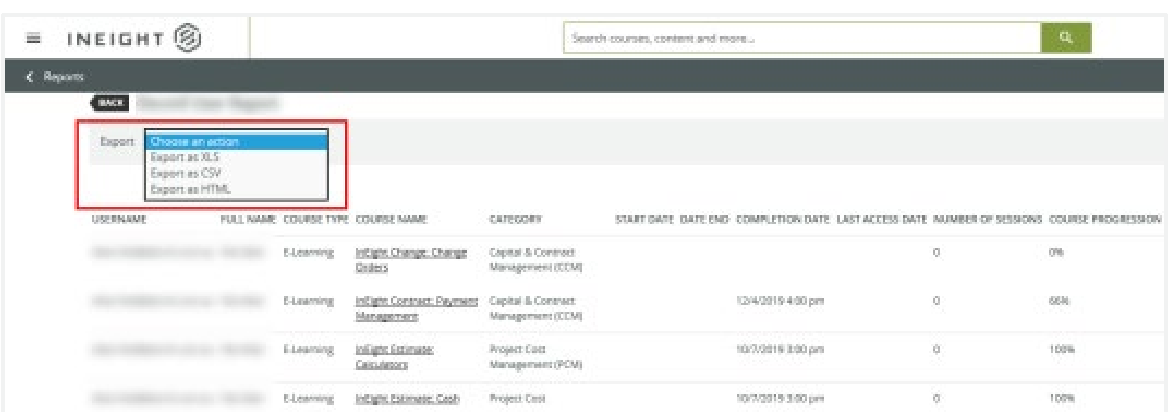
1.1.2 VIEWING REPORTS

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



Click the to view the report.

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



CHAPTER 2

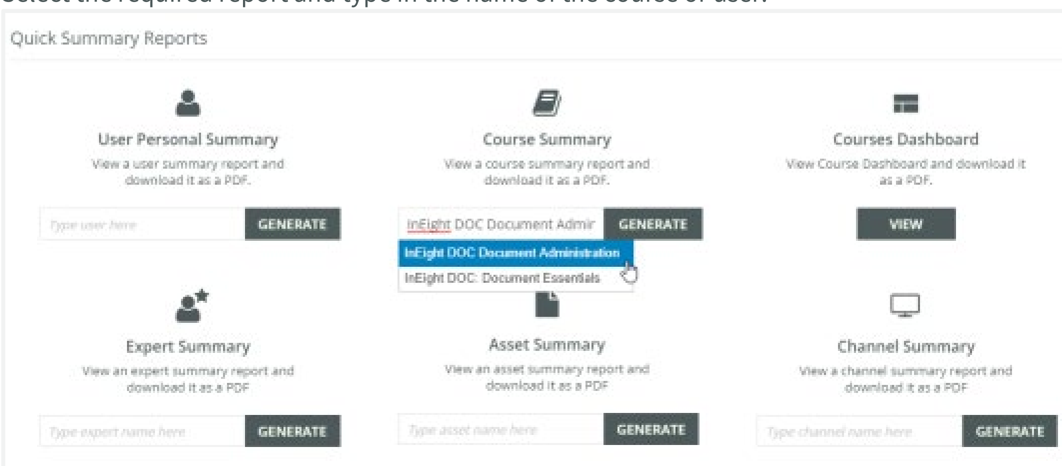
CUSTOM AND SUMMARY REPORTS

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.

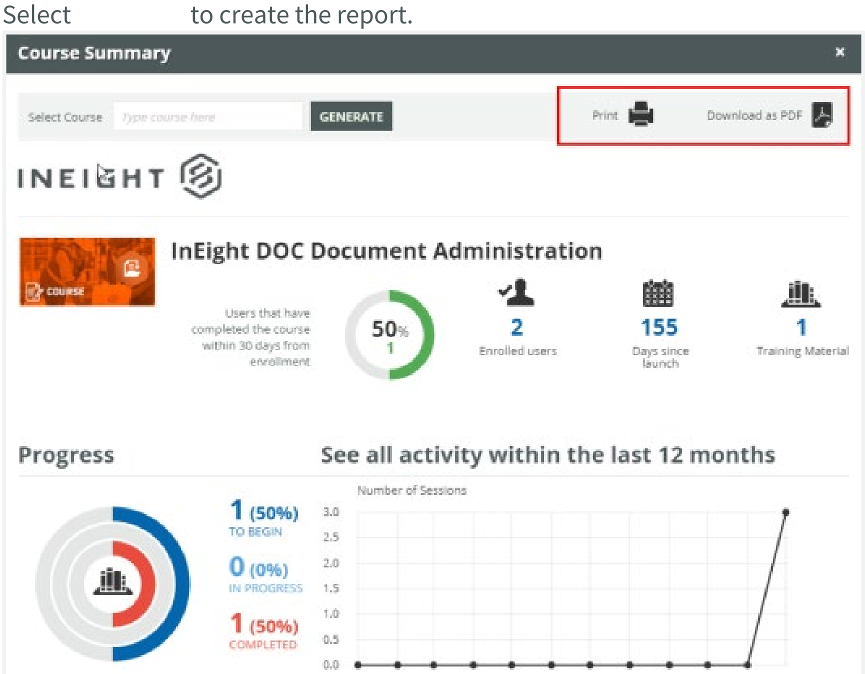
2.1 QUICK SUMMARY REPORTS

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.

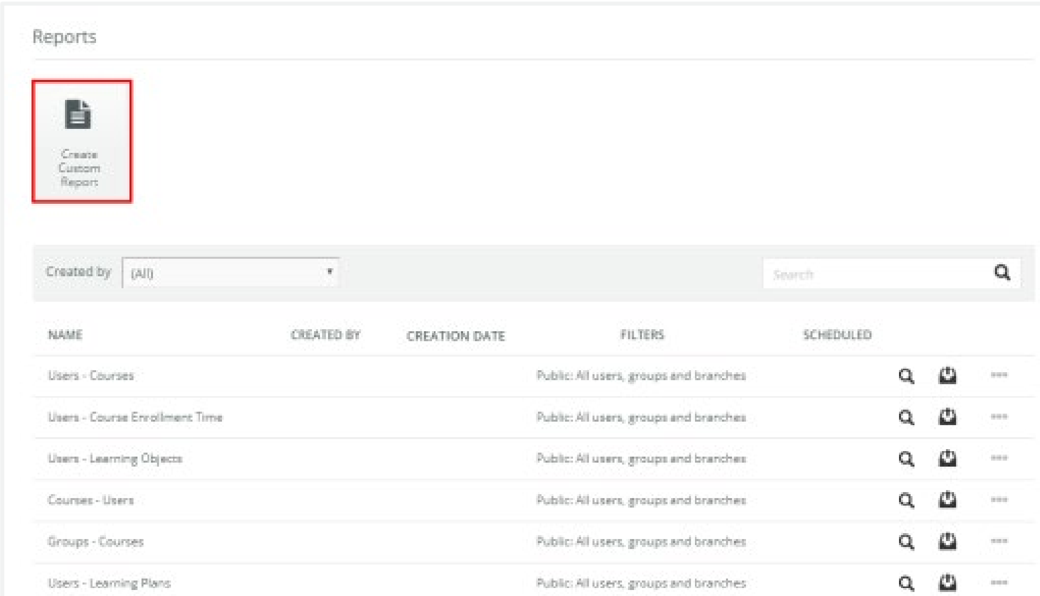


You can also or if required.

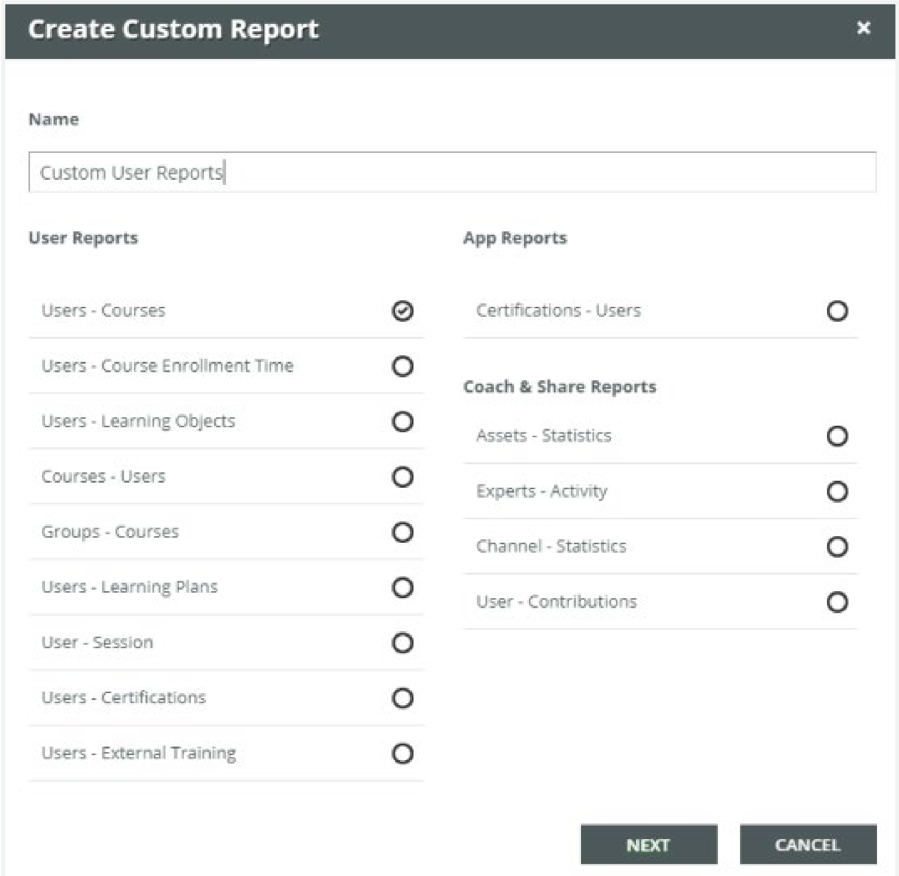
2.2 CREATING CUSTOM REPORTS

To generate a custom report, click the and select .

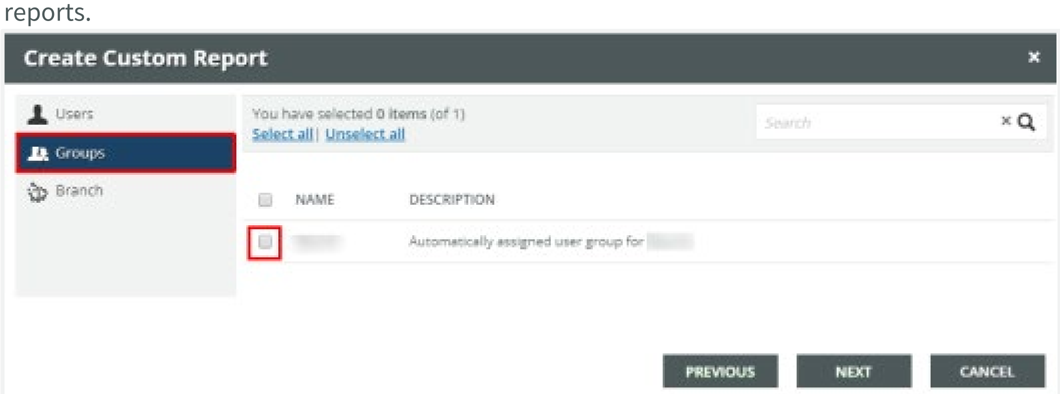
Select .



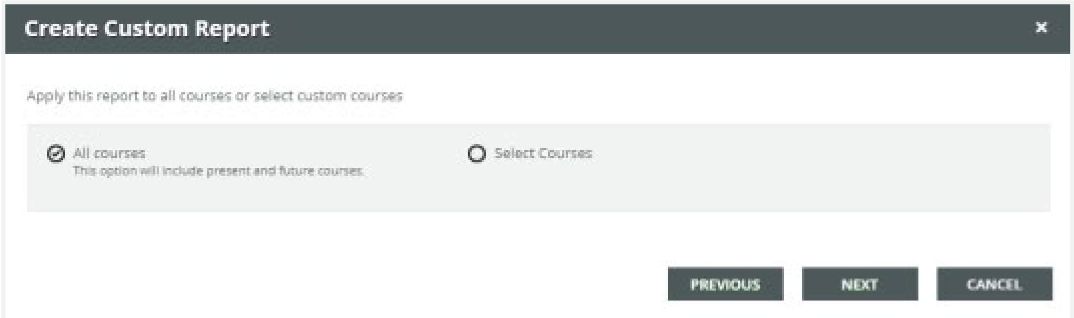
Select the type of custom report that you want to create and click .



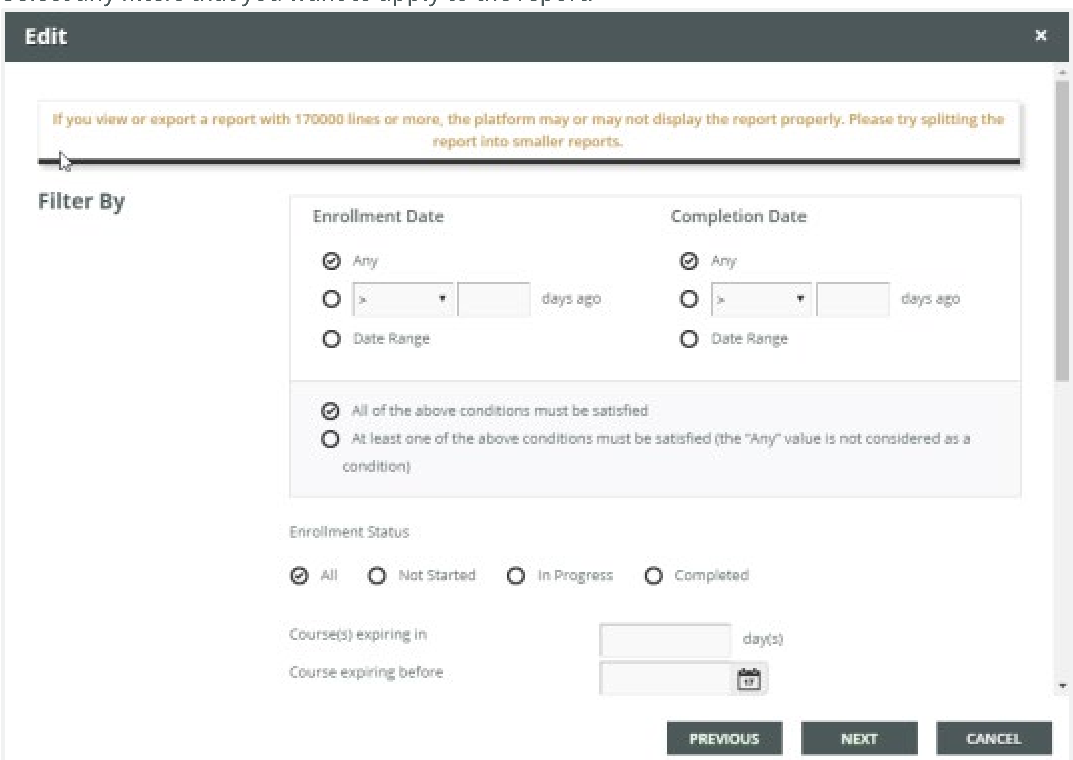
Select the users that you want to appear in the report. The easiest way of doing this is by clicking and then selecting your company name. This will ensure that new user data will automatically appear in future reports.



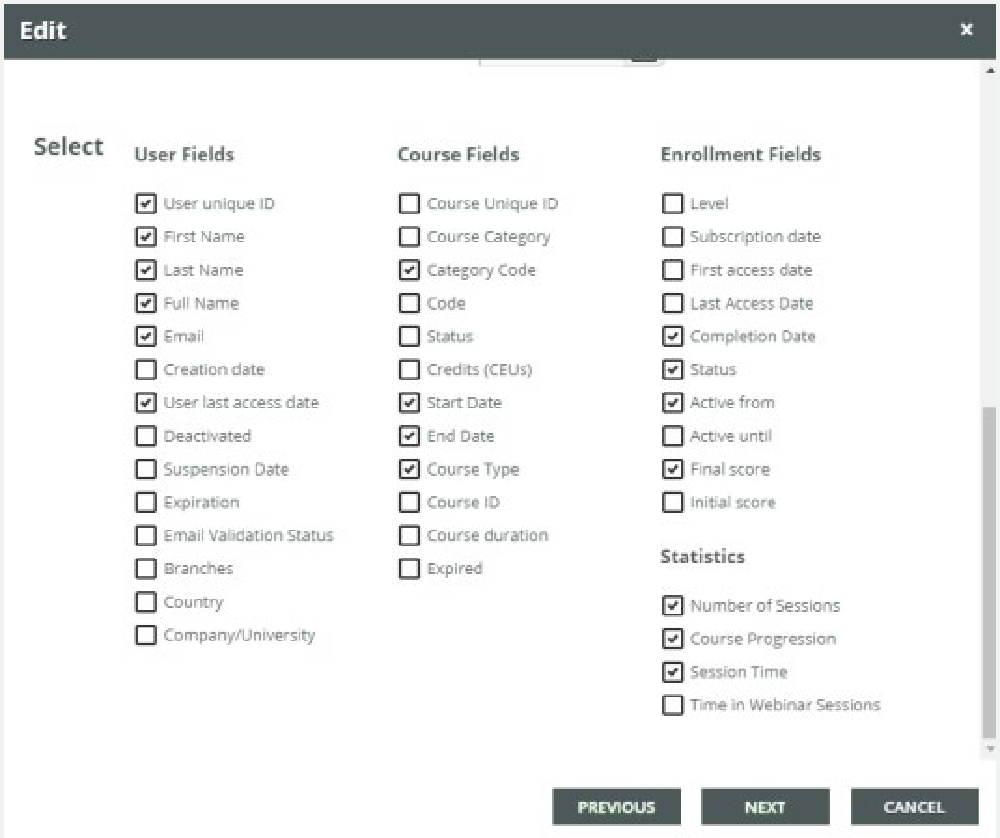
Select the courses for the report and click .



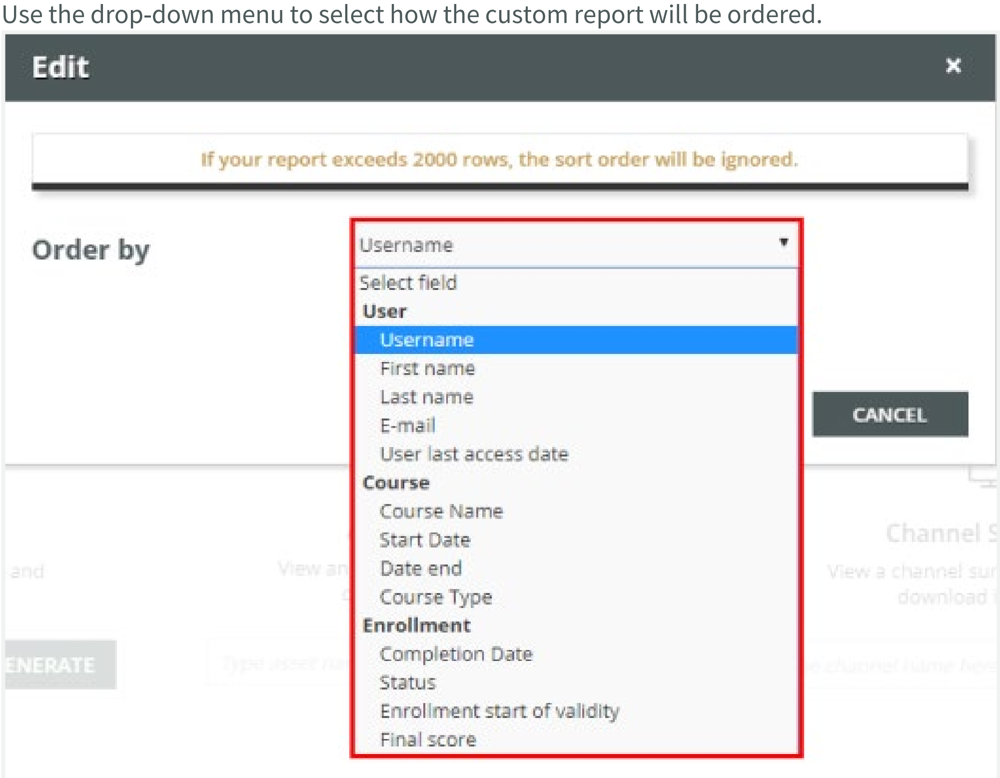
Select any filters that you want to apply to the report.



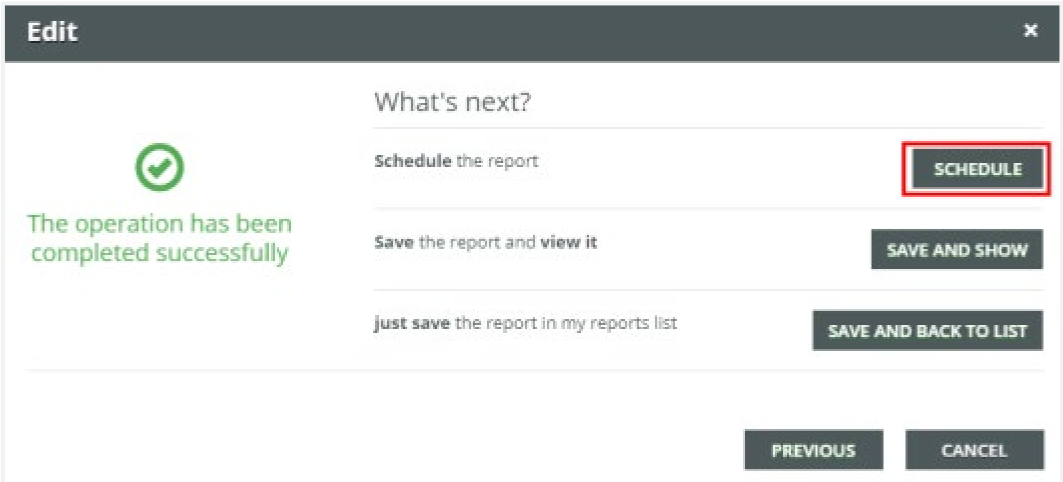
Scroll down and select the fields that you would like to include in the custom report and click .



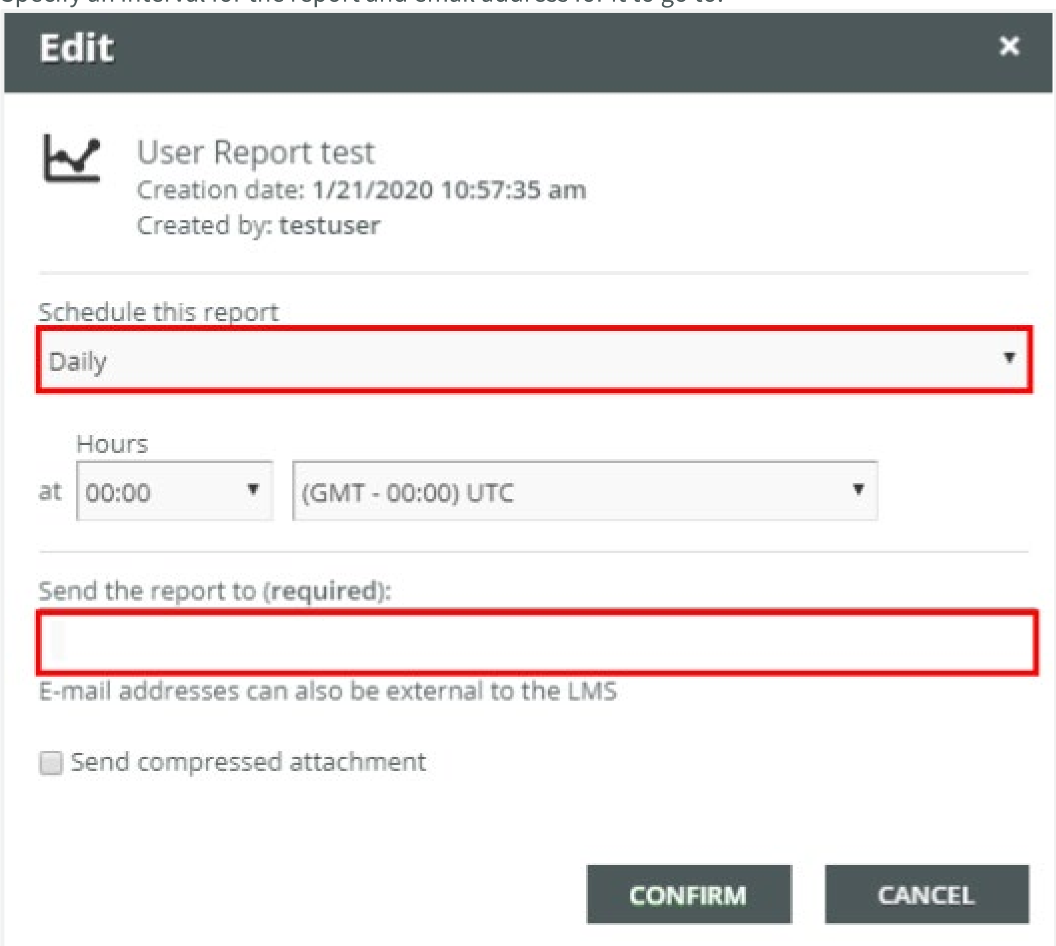
Use the drop-down menu to select how the custom report will be ordered.



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



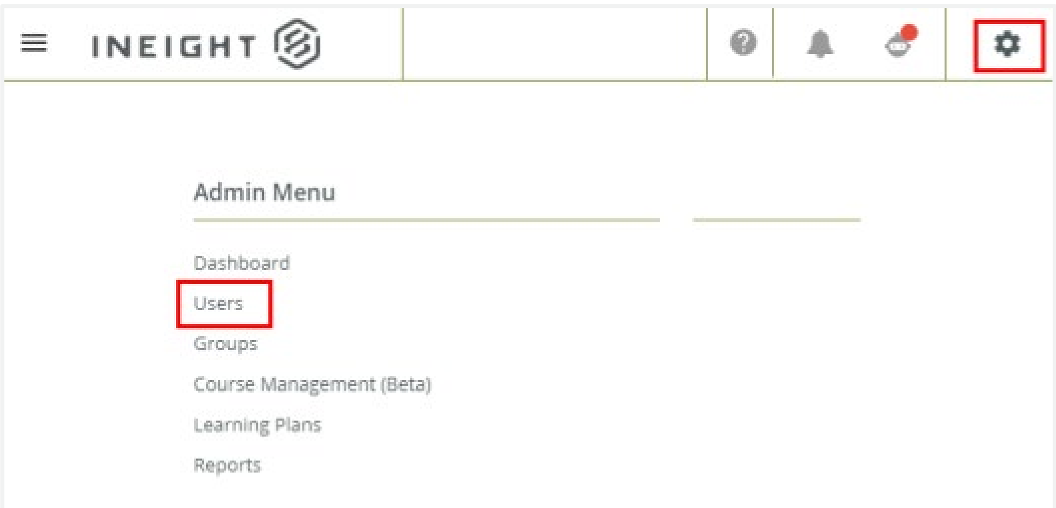
Specify an interval for the report and email address for it to go to.



CHAPTER 3
USER MANAGEMENT

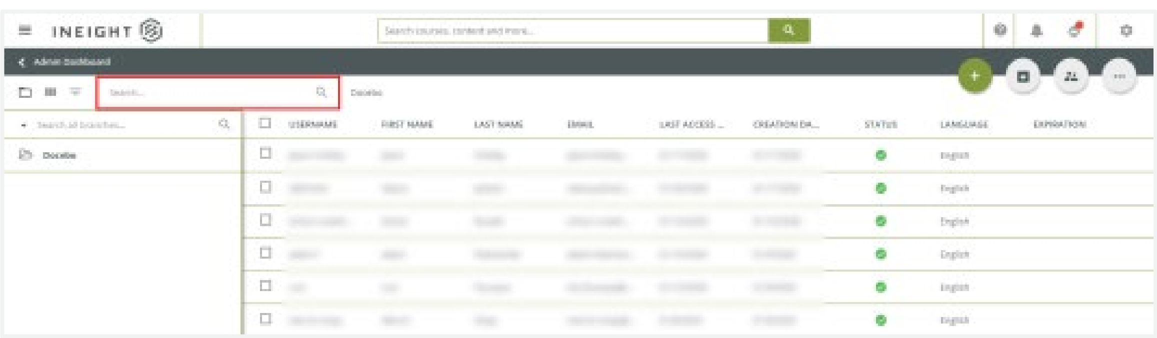
3.1 CREATING A USER

To create a new user, log in as a power user and open the by clicking the



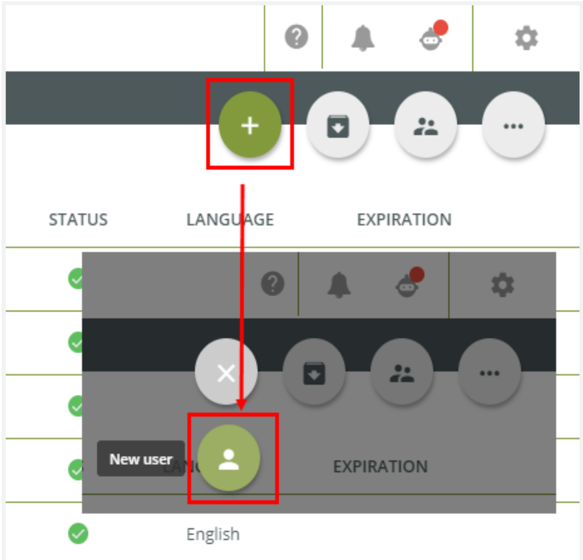
Select from the Admin Menu.

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

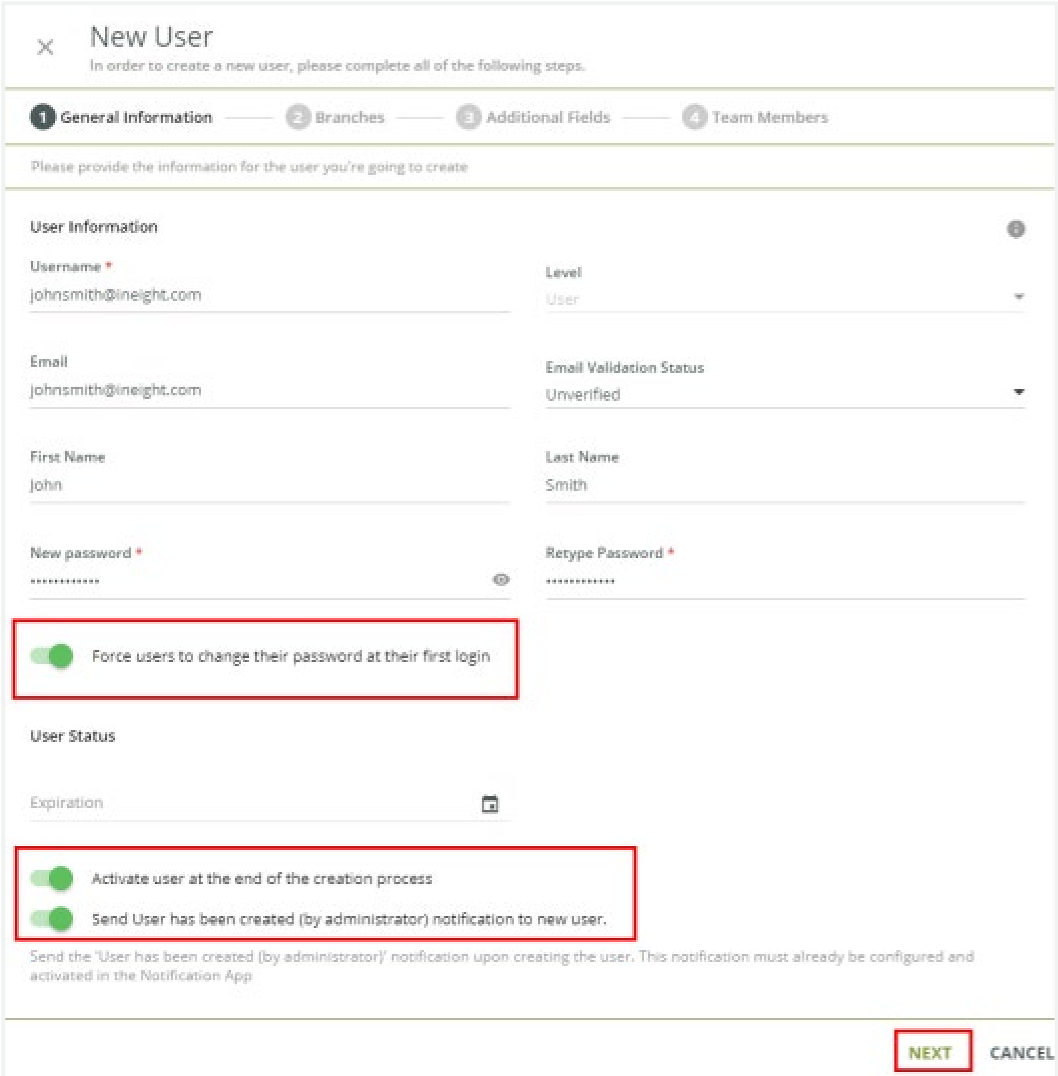


If there is no existing account, select from the admin menu to create one.

Select the and select .

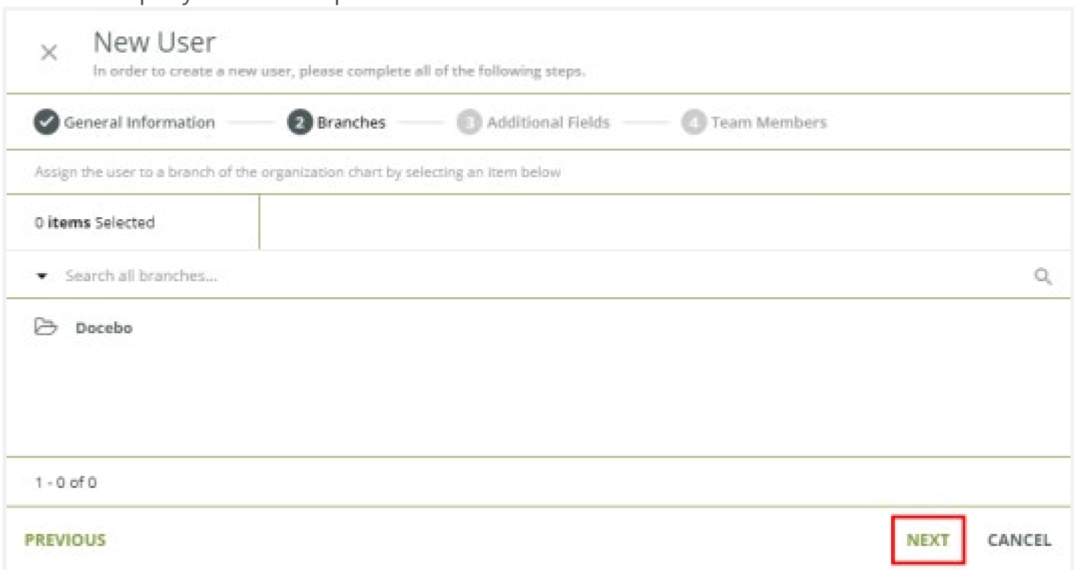


In the slide out panel, enter in the user information. Required fields will be marked with an asterisk (*).

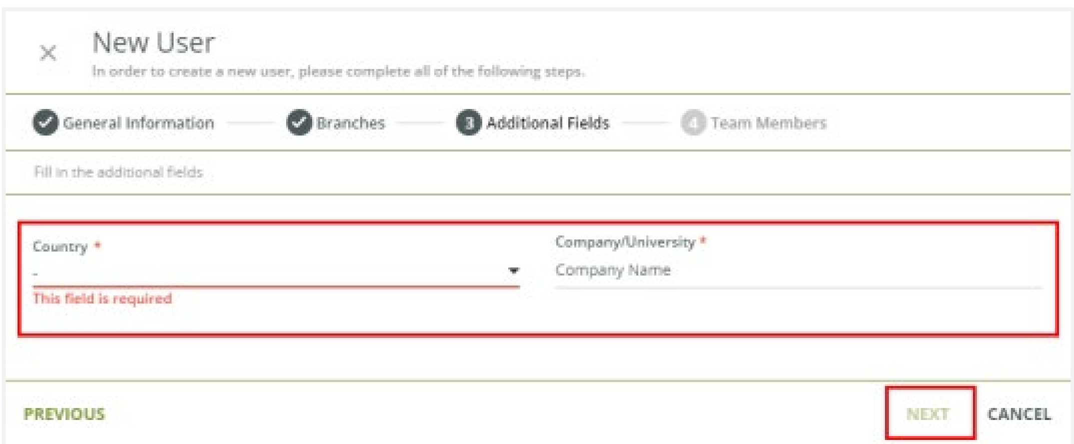


Ensure all 3 options on the bottom of the user creation screen are selected and click .

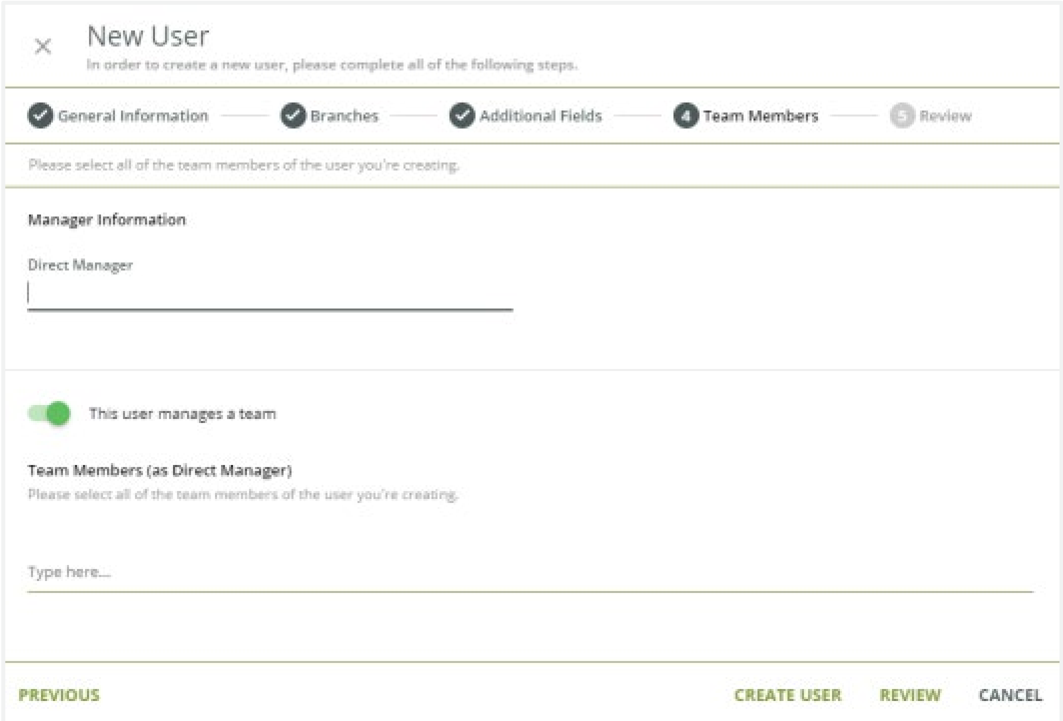
Select a company branch if required and then click .



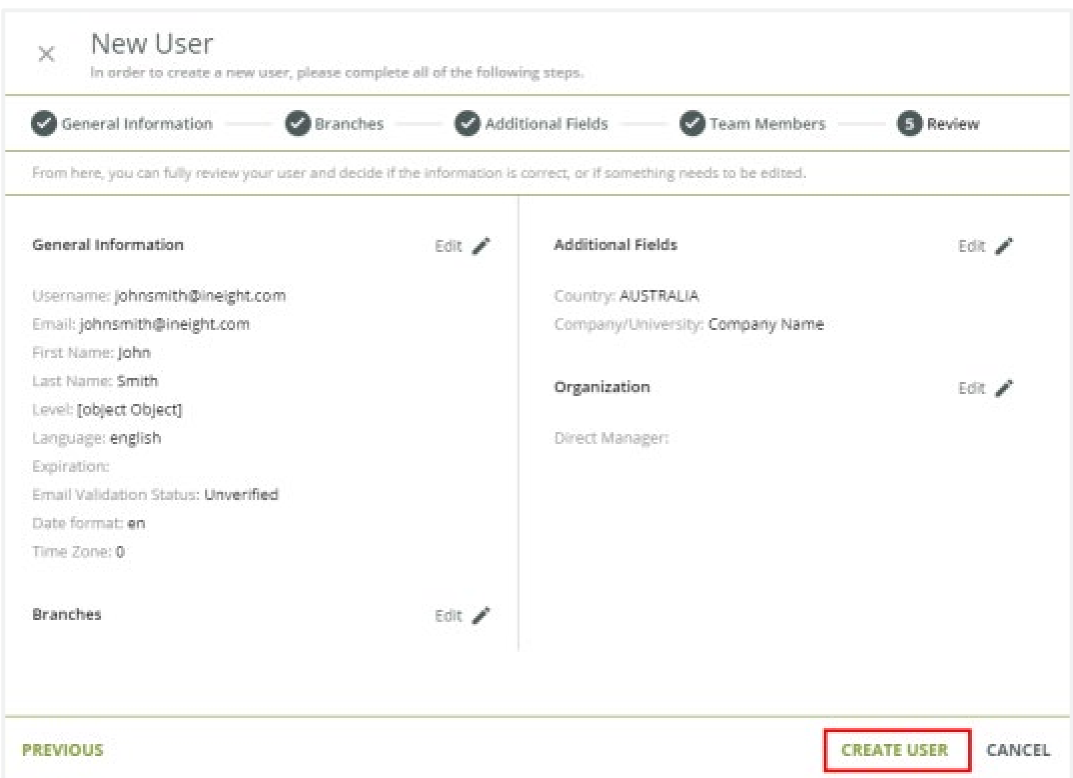
These fields should be pre-populated with your company's details. If not, enter in the and and click It is important to enter in the correct company name for reporting purposes.



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



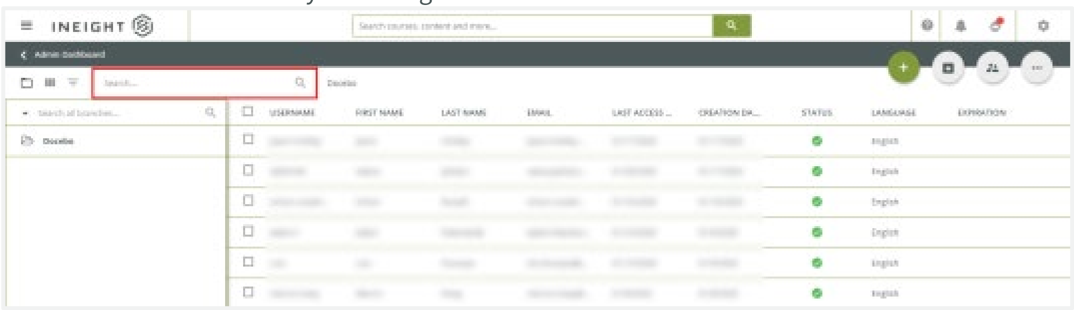
To complete user creation, click . You can also select to double check the user details you have entered.



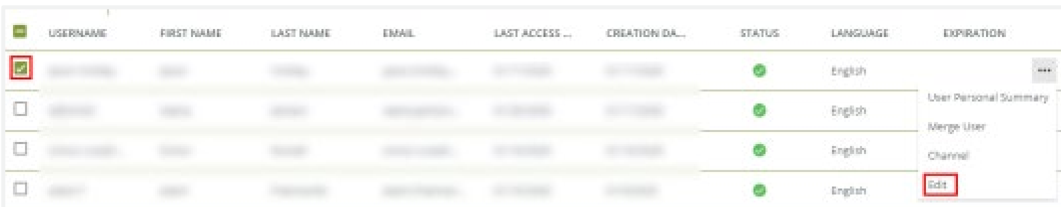
3.2 EDITING A USER

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

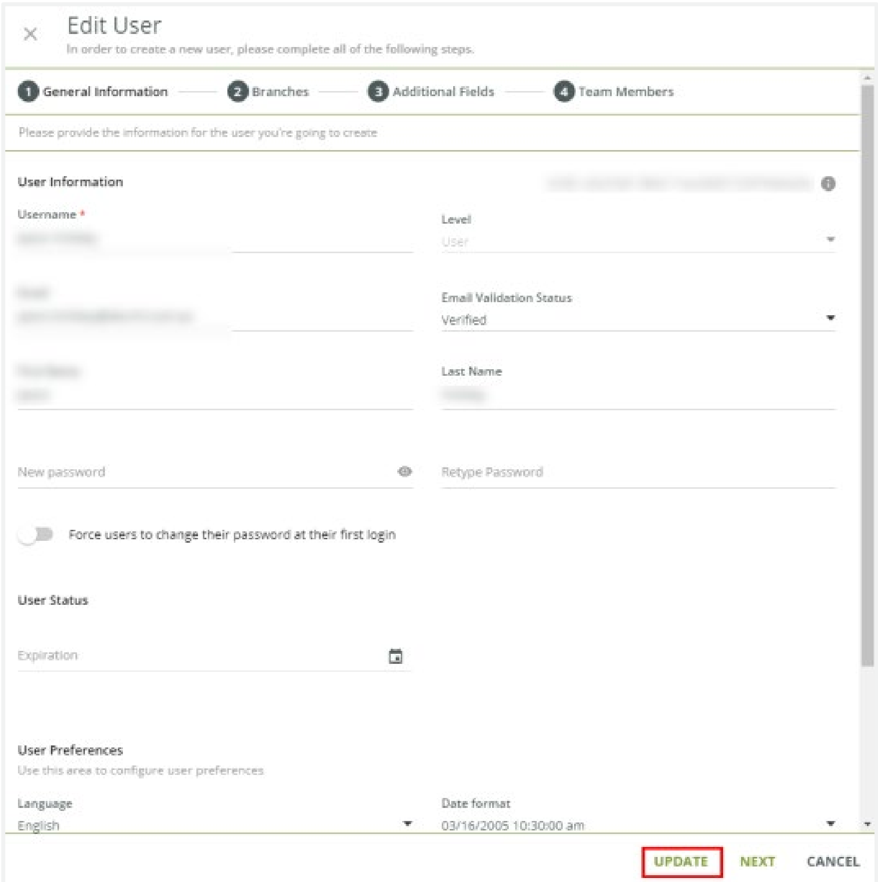
Locate the user's account by searching for their name.



next to the user and click the 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
User
Email Validation Status
Verified
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
English
Date format
03/16/2005 10:30:00 am
UPDATE
NEXT
CANCEL

CHAPTER 4

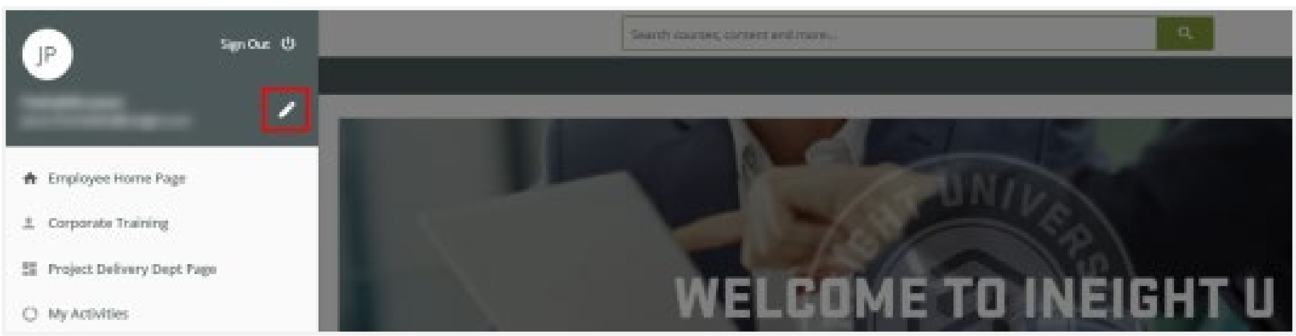
FREQUENTLY ASKED QUESTIONS

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 and then the .



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

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.

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 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